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**Representing and regulating the foreign resident: a socio-psychological approach to the struggles over the meaning of citizenship and mobility**

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PhD in Psychology

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December, 2021



CIÊNCIAS SOCIAIS  
E HUMANAS

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Department of Social and Organizational Psychology

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*Aos meus pais*





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## Resumo

Esta dissertação apresenta uma abordagem psicossocial para explorar como é que os direitos dos residentes estrangeiros são moldados pela relação de interdependência entre enquadramentos legais/institucionais (esfera reificada) e da criação de significado no quotidiano (esfera consensual). Com base na teoria das representações sociais e na psicologia social da cidadania, propomos explorar como é que a esfera reificada das leis incorpora os vencedores provisórios das ‘batalhas de ideias’ que estão envolvidas nos significados da cidadania; e como as leis são incorporadas e debatidas em diferentes âmbitos sociais. Este trabalho explora estas dinâmicas em relação à lei de residência de estrangeiros em Portugal, com foco numa inovação legal neoliberal –a autorização de residência para atividade de investimento - e em relação ao maior grupo de beneficiários: residentes chineses. Empiricamente, analisámos os significados de cidadania no texto das leis e na perspectiva de especialistas legais (Estudo 1). Depois, analisámos como é que os residentes chineses são apresentados/discutidos na imprensa (Estudo 2), como é que os residentes por investimento chineses e outros informadores-chave discutem questões de cidadania em entrevistas (Estudo 3) e como é que a sociedade de acolhimento Portuguesa vê a imigração chinesa num estudo por questionário (Estudo 4). Este trabalho mostra como a lei é legitimada por uma racionalidade neoliberal que ajuda à despolitização das tensões associadas aos direitos dos residentes estrangeiros. Os resultados mostram diferentes estratégias na forma como o significado da lei é apresentado como ‘inevitável’, ocultando a sua contribuição para a complexidade da cidadania e as suas desigualdades.

*Palavras-chave:* representações sociais, psicologia social da cidadania, imigração chinesa, residência por investimento, racionalidade neoliberal

### **Categorias de classificação e códigos PsycINFO:**

**2900** Processos Sociais & Questões Sociais

**3000** Psicologia Social

**3020** Processos Grupais & Interpessoais



## Abstract

This dissertation presents a social-psychological approach to explore how the rights of foreign residents are shaped by the interrelated dynamics between the legal/institutional frameworks (the reified sphere) and everyday meaning-making (the consensual sphere). Drawing from the theory of social representations and the social psychology of citizenship, we propose to explore how the reified sphere of laws is incorporating provisional winners of ‘battles of ideas’ involved in the - multiple and contested - meanings of citizenship, and how the meanings of these laws are being incorporated/debated in different social arenas of the everyday. We focus on these dynamics in context of the Portuguese foreign residency law, regarding a neoliberal legal innovation – Residence Permit for Investment Purposes – and its largest group of beneficiaries: Chinese residents. Empirically, we analyse the meanings of citizenship in the text of law and in the perspectives of legal experts (Study 1). Then, we analyse how Chinese residents by investment are presented/discussed in the press (Study 2), how Chinese residents by investment and other key-informants discuss issues of citizenship in interviews (Study 3) and how the Portuguese host society understands Chinese migration in a survey study (Study 4). We explore how this law is being legitimized by a neoliberal rationality that helps to depoliticise tensions related to foreign residency and mobility rights. The findings highlight different strategies in which these legal meanings are being presented as ‘inevitable’, making less visible the ways in which this law contributes to complexifying citizenship and its inequalities.

*Keywords:* social representations, social psychology of citizenship, Chinese migration, residency-by-investment, neoliberal rationality

### **PsycINFO Classification Categories and Codes:**

**2900** Social Processes & Social Issues

**3000** Social Psychology

**3020** Group & Interpersonal Processes



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# General Introduction

## 1. Introduction

This dissertation seeks to understand how citizenship and its meanings are shaped in the interaction between legal/institutional frameworks and everyday meaning-making. It aims to explore how social representations of citizenship are constructed and transformed by integrating two interdependent levels of analysis: laws and institutions that regulate citizenship - as a legal status of rights and duties - in interaction with citizenship as everyday acts, claims, norms, and social representations (Bloemraad, 2018; Bloemraad & Sheares, 2017). This question will be explored drawing from the theory of social representations (Moscovici, 1961/1976, 1988) and the recent social psychology of citizenship (Andreouli, 2019; Stevenson et al., 2015). They will be applied to the case of the newly implemented residency permit for investment purposes and their Chinese beneficiaries in Portugal.

Some of social psychology's key concepts, such as national identity, collective action, pro-social behaviour and solidarity, are at the core of citizenship concerns (Condor, 2011). However, only very recently did social psychology start to contribute to - and also incorporate from - citizenship studies and advances in general. Simultaneously, various topics of research, such as migration, one of the most popular topics in the discipline of social psychology (Jetten & Esses, 2018; Verkuyten, 2018), would benefit from a citizenship lens. This is because approaches to citizenship integrates the institutional and the everyday (Andreouli, 2019; Andreouli & Howarth, 2013) making it possible to explore the struggles that shape inclusion – or contrarily exclusion and marginalization of migrants - in society (Stevenson et al., 2015). The dynamics through which the legal status of the 'foreigner' is contemplated in the law and later re-integrated in everyday lives both through institutions and everyday claims-making, reflect the power dynamics involved in the construction of citizenship (Bloemraad, 2018). This is a situated framework supporting a 'social' social psychology that has long been neglected in the discipline, expanding the individual perspectives that explain socio-psychological phenomena with an in-depth analysis of social and political contexts in which they unfold (Elcheroth et al., 2011; Langhout & Fernández, 2018; Scuzzarello, 2012).

Citizenship is then at the heart of everyday meaning-making struggles, – particularly salient within the topics of mobility and migration – suggesting the integration of the study of how foreigners are granted rights and how they can claim their residency rights in different countries

and contexts (Bosniak, 2006; Soysal, 1994). The proposed framework also contends that what it means to be a *citizen* is in constant change (Susen, 2010), i.e., who is perceived and understood to have the right to claim rights is subject to constant debate (Isin, 2017; Isin & Turner, 2007).

This is also reflected in laws. Legal analyses show how laws have been changing to accommodate different meanings and understandings of who can claim rights (Bosniak, 2000, 2006; Gil, 2017). For example, the implementation in 1882 and repeal (in 1943) of the Chinese Exclusion Act in the USA – not allowing Chinese labourers the right of entry and permanence, neither the possibility to naturalize as American citizens - illustrates how laws and institutions are transforming and affecting mobility in response to social and political struggles and tensions (Kil, 2012; Shimpi & Zirkel, 2012). Still, nowadays, laws and institutions are responsible for creating criteria for how foreigners are entitled of entry and residency. The establishment of the status of the asylum seeker by the Geneva Convention of 1951, in the aftermath of the Second World War, is an example that shows how a category of people is bureaucratically created to allow for certain rights for residency to be granted (Erdal & Oeppen, 2018; Mahendran et al., 2019; Torkinton & Ribeiro, 2019).

Today, in times of increasing mobility, more diverse categories of foreigners exist (Cresswell, 2010) both formalized in institutional frameworks or, informally, in everyday understandings of migration such as the asylum seeker/refugee (Mahendran et al., 2019), the (economic) ‘migrant’ (Torkinton & Ribeiro, 2019), the frequent traveller (Calhoun, 2002), or lifestyle migrant (Scuzarello, 2020; Torkinton, 2012). The ways in which some these categories are institutionally conferred allows for different migration/permanence claims and rights (Andreouli & Howarth, 2013). When formalized, these categories are the result of a collective agreements made *legitimate* through institutions and other actors in society (Scuzarello, 2012). These legal meanings can nevertheless be incorporated in everyday meaning-making with an array of responses to it: from acceptance, contestation, or ambiguity (e.g. Castro & Mouro, 2011; Mouro & Castro, 2012). These can also be reflected in institutional cultures and in the interaction between services conferring such meanings, and the public (Renedo & Jovchelovitch, 2007; Stevenson, et al., 2014) i.e., in mediating systems (Castro & Batel, 2008).

The context of the legal system in Portugal for foreign residency provides an opportunity to explore some of these dynamics. Particularly, it allows to explore how laws and institutions reflect the citizenship struggles in the creation of categories of migrants with different conditions for entry and inclusion. First established in 2007 (*Law 23/2007, July 4<sup>th</sup>*), the foreign residency law has suffered alterations to accommodate contemporary mobility trends, as stated

by official documents (SEF, 2013). The most notable example has been of the implementation of residence permits for investment purposes, popularly called ‘golden visas’ in the Portuguese public sphere (Amante & Rodrigues, 2020; Gaspar & Ampudia de Haro, 2019). This is a citizenship-by-investment programme that offers full residency rights for the people who invest, exempting them from any long-term permanence (Tanasoca, 2016). Other European countries, such as Spain, Hungary, Greece or Bulgaria also embraced this way of attributing residency rights, some granting nationality directly, such as Malta and Cyprus (Parker, 2017; Shachar, 2017). More attention to the emergence of different categories for mobility and how they are made sense of in everyday life are necessary to explore contemporary citizenship debates and struggles (Joppke, 2019; Mavelli, 2018).

Border selection of foreigners according to an ‘earned citizenship’ framework is not particularly new (Joppke, 2007). This is a framework that establishes criteria based on representations that sees some individuals and groups more worthy of entrance and permanence (Andreouli & Dashtipour, 2014; Andreouli & Howarth, 2013). For example, in Western European countries there is a facilitated entrance to skilled labour with a ‘Western’ background, (e.g., US, Australia, New Zealand) than unskilled labour from other national backgrounds (Joppke, 2007). The residency by investment scheme, however, makes this discrepancy more obvious by emphasizing economic capacity instead, following the logics of the global market (Ampudia de Haro & Gaspar, 2019; Shachar, 2017; Tanasoca, 2016) and to protect the neoliberal state (Amante & Rodrigues, 2020). The implication of such neoliberal configuration of citizenship needs to be analysed in view of what citizenship claims are being supported and promoted, especially in relation to and by Chinese residents - the largest group of beneficiaries in Portugal (Amante & Rodrigues, 2020). Most of them aim to pursue ‘flexible citizenship’ (Ong, 1999) because of this programme’s loose regulation on mandatory permanence time (7 days in the first year and 14 days every two subsequent years).

This work will thus look at the processes involved in the creation and establishment of the category of the foreign ‘investor’ in the Portuguese legal framework (Amante & Rodrigues, 2020). In particular, it will analyse how this category contributes to everyday citizenship struggles and claims. For this, this dissertation will use a multi-method approach to explore a new basis for citizenship rights-claiming. This will include (1) an analysis of the meanings of citizenship highlighting the interaction between the institutional and the everyday spheres, drawing from a social representations approach that defines the reified and the consensual spheres and (2) an analysis of how residency-by-investment is made sense of in everyday life in relation to and by Chinese residents in Portugal. There will also be a focus on the processes

that mediate communication, made more evident in the interaction between these spheres, that can be more on the side of the reified sphere (e.g. experts) or on the side of the consensual (e.g. the press).

This work will then reply to the following research questions:

1. What are the citizenship representations supported by Portuguese laws and institutions?

Particularly:

(a) what are the tensions involved in the meanings of citizenship presented by the text of law of foreign residency and (b) by the legal experts that help apply the law?

2. How is the residency-by-investment programme being debated in everyday interactions and in relation to and by Chinese residents? Particularly:

(a) what are the processes involved in the presentation of Chinese residents and investment residency in the press;

(b) how is residency-by-investment discussed and made-sense of by Chinese residents and

(c) how does such legal definition of foreign residency contribute to processes involved in hindering or facilitating Chinese residents' everyday citizenship by the Portuguese host society?

## **2. Organization of the thesis**

This thesis is organized in three sections. **Section I** is made of **Chapter 1-5** and comprises the theoretical framework. **Section II** is the empirical section and includes four empirical studies each one corresponding to **Chapters 6-9**. The **Section III** is the final section and presents the general discussion and conclusions of the thesis.

**Chapter 1** presents an overview of the theory of social representations (Moscovici, 1961/1976, 1984, 1988), the theoretical framework adopted in this dissertation. First, this chapter shows the importance of such a framework for the study of the transformation and stabilization of meaning (Castro, 2002a, 2002b; Vala & Castro, 2013). We follow with the presentation and definition of the reified and consensual spheres and how the analysis of their interactions helps to explore the dynamics of power involved in meaning construction. The interrelated dynamics between the reified and the consensual spheres will be presented as an approach to explore how laws are created and incorporated in everyday life (Castro, 2012). In



this sense, the reified sphere is the sphere of laws and institutions, working to stabilize meaning from the diverse and plural sphere of the consensual sphere/common-sense. During the implementation of laws, the meanings there contemplated are incorporated in everyday life and common-sense, where plurality and innovation are present, allowing for different perspectives in relation to these laws possible. This is an approach particularly useful to analyse how new laws are entering societies with new values and meanings, particularly, laws that affect foreign residency, citizenship, and mobility.

**Chapter 2** reviews the literature on the social psychology of citizenship showing how it is an important framework for the study of how societies and migrants interact (Verkuyten, 2018). This overview will draw from citizenship studies to help conceptualize a framework that is supported by the dynamics of the reified and consensual spheres as discussed in the earlier Chapter, including the role of mediating systems in integrating meanings of both spheres as analysed in different interactions between foreign residents and national institutions (Andreouli & Howarth, 2013; Silka, 2018). For this, this work contends that for the study of foreign residency it is more useful to understand citizenship that is simultaneously a status and a form of everyday (discursive) practice (Bloemraad, 2018). We will also complement this perspective by including a concern over the limits of citizenship are being drawn and debated (Bosniak, 2000; Di Masso et al., 2019; Wimmer & Glick-Schiller, 2002): either in relation to nation-states, or across them, and including locational aspects of citizenship as well. By including a concern over the dynamics of these dimensions and locations of citizenship, this framework is particularly sensitive to the inequalities brought by global markets and neoliberalism in shaping citizenship configurations that make some foreign residents more worthy of rights than others (Glick-Schiller & Salazar, 2013; Mavelli, 2018).

**Chapter 3** explores how neoliberalism is shaping subjectivities and meaning-making through a process of depoliticisation that is visible in everyday discourse (Maesele, 2015; Mouffe, 2006; Wood, 2016; Wood & Flinders, 2014). Depoliticisation refers to the process in which ideas and representations are presented in dichotomous ways, stablishing definitions of what is good or bad and hiding the political, argumentative nature of meaning in everyday life. We will follow with an articulation of how the study of depoliticisation can be conceptualized using concepts of the theory of social representations (e.g. Boager & Castro, 2021; Santos et al., 2020). This chapter finishes with an overview of the ways in which meanings of citizenship and mobility are particularly affected by neoliberalism as a political rationality that considers the wealthy, skilled, hyper-global citizen, the new citizenship norm (Ong, 2006, 2007; Mitchel, 2016).

**Chapter 4** focusses on the object of our study, the Portuguese foreign residency law and, in particular, the implementation of a residency permit for investment activities, that are popularly called ‘golden visas’ in the Portuguese public sphere (Amante & Rodrigues, 2020). This chapter presents an overview of the law regulating this programme and will reflect on the consequences for representations of citizenship (Gaspar & Ampudia de Haro, 2020; Ampudia de Haro & Gaspar, 2019). This chapter also shows how this programme has served to attract new Chinese mobilities (Amante & Rodrigues, 2020; Gaspar, 2017). The implementation of this programme in Portugal, as well as in other European countries, stimulated the entrance and permanence of Chinese nationals seeking for an ‘European and flexible lifestyle’ (Nyíri & Beck, 2020).

**Chapter 5** presents the approach adopted in this dissertation and integrates the literature reviewed. This chapter also explains how the theoretical framework guides the design of the empirical studies in the upcoming Chapters.

**Section II** is the empirical section. **Chapter 6** comprises of Study 1 and includes the analysis of the Portuguese foreign residency law and how it is implemented in the everyday of institutional practices, as described by experts. In this chapter we explore the values chosen to help define who is the acceptable foreign resident. This means that the law attempts to simplify and stabilize some of the ‘battles of ideas’ surrounding citizenship. The law also keeps some everyday battles alive and open to re-signification, particularly, regarding rights to mobility in helping define belonging to a polity. The analysis will highlight how the residency by investment law, introduced in the legal text only in 2012 – added to the complexity of citizenship meanings.

Also in this chapter, we illustrate the interdependent dynamics of the reified and the consensual spheres as portrayed in the interviews with legal experts from a governmental mediating system. The analysis highlighted the ways in which laws are seen to be re-signified by different institutions, allowing, at times, a broad range of alternative interpretations of the meanings of the law. The dilemmas and tensions present in the law were understood to be amplified by institutional practices. In particular, the residency by investment legal innovation was taken in such a way that further legitimized sub-categories of citizenship privileges, by creating an exclusive platform for a hastier application. Discursively, these sub-categories were made sense through a dichotomization of the “helpless” vs. the “empowered” migrant, demonstrating how the consensual sphere provides representations that help make sense of the proposals of the reified sphere.

**Chapters 7-9** show how the legal proposals are then re-signified and enacted in everyday meaning-making. Here the focus is the residency-by-investment legal innovation and in relation to its larger group of beneficiaries, Chinese nationals. Different chapters analyse (a) social representations in the press, (b) the perspectives of Chinese residents by investment and other Chinese key-informants, and (c) the perspective of the overall host society.

**Chapter 7** explores how the residency-by-investment law was presented in the press in its first years of implementation and in relation to Chinese migration (2012-2017). This study shows a computer-generated thematic analysis and a traditional content analysis to newspaper articles to explore how Chinese mobility was being presented, particularly, Chinese residents by investment. The analysis shows how this legal innovation, as incorporating neoliberal values and while emphasizing migrants' unnecessary involvement with place, is presented outside the immigration debate and discussion to the public. The press thus obscured the consequences of this legal innovation to the citizenship debate and to the (re-)definitions of the who is deemed a foreign resident by presenting it as a – much needed - economic mechanism. Analysis points to a depoliticised discourse drawn from a neoliberal rationality, where policies to help the economy (such as residency by investment) are understood as “inevitable”.

**Chapter 8** shows how residency-by-investment is made sense of in the everyday experience of its beneficiaries and other Chinese residents as key-informants (Study 3). We performed a discourse-oriented thematic analysis to interviews with Chinese residents by investment and key-informants in Portugal. We explored how the proposals of the law support different mobility rights as exclusive to wealthier migrants. Analysis highlighted the representational and discursive processes involved in the normalization of the investment legal innovation and of its new entitlements. This is achieved by unproblematically assuming that desired mobile lifestyles require more flexible legal frameworks and citizenship regimes. There is a shared representation that this legal innovation reflects the natural course of mobility in a globalized world, by distinguishing a past in which people moved because they were “forced”, whereas now people move because they can “choose”.

**Chapter 9** examines how the legally defined categories of foreign residency may contribute to legitimize different understandings of sub-groups of migrants by the Portuguese host society (Study 4). This study will apply an experimental design in eliciting the two most salient legal categories in context of Chinese migration – residency by investment and residency by work, that through different perceived economic contributions and threats, are expected to explain differences in attitudes towards Chinese residents. Contrarily to the hypothesis created in relation to the previous moments of data collection, results showed that the residency-by-

investment category was associated with more negative attitudes towards Chinese residents. This shows that the public is elaborating alternative views of how this legal innovation can be understood, contrasting with the presentation of the press.

Finally, in **Section III**, will present a general discussion of the results and findings. There will be an overview of the results of each study and the most relevant theoretical contributions to this dissertation. The first contribution relates to the relevance of studying the interaction between the reified and the consensual spheres in shaping meanings of citizenship, including in mediating systems part of the reified that are more visible in the interaction between institutions and foreign residents. This is particularly relevant in understanding the relationship between host societies and foreign residents (Blackwood et al., 2015; Scuzzarello, 2012; Silka, 2018). The second contribution relates to the study of neoliberalism as constructing a hegemonic social representation (Boager & Castro, 2021). This includes the analysis of how neoliberal values are part of common-sense through discursive devices that help to depoliticise social issues (Hall & O’Shea, 2013). The third contribution relates to this proposed framework to explore the neoliberal mutations of citizenship (Ong, 2006). This is an approach that not only considers the dimensions of citizenship (as a status or everyday practice) but also considers its constructed limits – and how these limits are being debated to help put forward complex views as to *who* has access to foreign residency and mobility rights (Mavelli, 2018; Mitchel, 2016; Ong, 2006).

## **SECTION I. THEORETICAL FRAMEWORK**



# **Understanding meaning-making: a social representations approach to the reified and consensual spheres in interaction**

## **1.1. Chapter presentation**

In this chapter we will present an overview of the theoretical approach used to explore meaning-making. We will present the theory of social representations (Moscovici, 1961/1976, 1972, 1984, 1988) and its importance for the study of situated social-psychological phenomena. This theory emphasizes the co-created nature of meaning that is diverse and multiple, configuring everyday tensions and ‘battles of ideas’ (Moscovici & Marková, 2001). These battles participate in structuring social life – making some social representations and meanings more prominent/legitimate than others – but also provide the opportunity for change and transformation by allowing alternative representations to arise (Howarth, 2006b). Then, we will focus on two concepts of the theory: the reified sphere, i.e., an arena in which meanings and ideas that are institutionalized by science and laws, and the consensual sphere, made of social representations and everyday meaning-making where diversity is expressed (Moscovici, 1984; Batel & Castro, 2009). We will follow to explore the interaction between these spheres, particularly, how laws and institutions, as part of the reified sphere, interact with the consensual sphere of everyday social representations (Castro, 2012). Mediating systems are places where this interaction becomes more prominent (Castro & Batel, 2008). Mediating systems can be part of the reified sphere, like institutions applying laws, or part of the consensual sphere, like the press. We will then discuss how these systems integrate the reified and the consensual spheres in everyday interactions exposing the power dynamics that configure ‘battles of ideas’.

## 1.2. Introducing the theory of social representations: a perspective to explore meaning and ‘battles of ideas’

The origin of the theory of social representations (TSR) is in Serge Moscovici’s (1961/1976) study of how psychoanalysis was received by different social groups in France. The enthusiasm and the criticism around it marked the decades after, where its significance in the social psychological field grew (see Castro, 2002a, 2002b; Vala & Castro, 2013 for an overview). In its essence, it is a theory that emphasizes the “social” in social psychology by proposing a view of the self as interconnected with the social world around them, and not separated from it (Moscovici, 1961/1976; 1988).

*Social representations are systems of values, ideas and practices with a twofold function: first to establish an order which will enable individuals to orientate themselves in their material and social world and to master it; and secondly to enable communication to take place among the members of a community by providing them with a code for social exchange and a code for naming and classifying unambiguously the various aspects of their world and their individual and group history. (Moscovici, 1973, p. xiii).*

As this quote shows, social representations provide the contents in which human beings, since early childhood, navigate social realities. These could be cues to mundane interactions such as how to greet or behave in public or language acquisition and learning (Moscovici & Marková, 2001). These processes of learning, however, are not limited to childhood. Throughout life, individuals and groups co-create social representations of the world they live in as new ideas and challenges are being integrated/incorporated (Vala & Castro, 2013). Because social representations are shared/consensual among societies, but are not homogenous, communication is possible (Castro, 2002a).

Social representations, then, are constructed, maintained, and transformed with *others*, like members of a community as highlighted in the quote above. This is a function described by the triangular model of ‘Subject-Other-Object’ (Bauer & Gaskell, 2008; Marková, 2003; Moscovici, 1972), contending that objects can only have meaning in interaction with Others. These interlocutors can be of different kinds, they can be proximal people or more abstract figures, such as the state or policies. In everyday interactions social representations reflect meta-



information about these Others (Castro & Santos, 2020), and elicit different positions of the self (Marková, 2003).

Some critics to the theory have rather hastily understood the concept of social representations as the sum of “individual” representations (Potter & Litton, 1985; Jahoda, 1988). But generally, the development of the TSR has tried to contradict individual approaches in social psychology (Farr, 1996; Rizzoli, et al., 2018)<sup>1</sup>. TSR focusses on the processes in which social representations are co-created and fuelled by meta-systems that are socially shared, re-elaborated and transformed (Moscovici, 1984; 1988; 1993) – not within minds but “*across* minds” (Wagner et al., 1999, p. 96, original emphasis). In this sense, context does not need to be “extracted” or seen as a barrier for exploration of social psychological phenomena (Howarth et al., 2013). The self is not a stripped-down version or a molecular state of individual experience: the self is constituted by the Other/others, culture, and context (Batel & Castro, 2018; Jovchelovitch, 2007; Jovchelovitch & Priego Hernandez, 2015).

TSR’s primary focus has been on the dynamics involved in the transformation of meaning following Moscovici’s seminal work on how psychoanalysis was integrated in French society (Moscovici, 1961/1976). The transformations – or stabilization – of social representations is still an object of enquiry for the supporters and developers of this theory that have explored, along the years, different “new” topics entering society, such as the study of public understanding of new technologies, (e.g. GMO’s Castro & Gomes, 2005); or how individuals and groups make sense of climate change issues, biodiversity conservation or renewable energies (e.g. Batel & Adams, 2016; Batel et al., 2016; Marková, 2003) and new infectious diseases like AIDS, Ebola, or COVID-19 (e.g. de Rosa & Mannarini, 2020; Joffe & Haarhoff, 2002; Marková & Wilkie, 1987).

These topics of research, however, do not have to be related with “new” social ideas entering society. Social representations scholars have explored issues that foment debate or controversy, such as the meanings of citizenship (Andreouli & Howarth, 2013) or race (Howarth, 2002, 2006b) just to name some examples. The TSR came to expand the individual approaches that investigated social knowledge through information processing models (Farr, 1996) that consequently assumed everyday thinking to be “flawed” because it does not automatically incorporate or reproduce ideas as they are presented (Kronenberger, 2015).

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<sup>1</sup> Scholars have identified different orientations in which the TSR has developed (de Rosa, 2013; Vala & Castro, 2013). The structural approach developed by Abric (1993) is more closely related with cognitive approaches. Others approaches to TSR such as the sociological/positional approach fomented by Doise or the dialogical approach by Marková (2003) take more of a “strong” view of the *social* in social representations (Batel & Adams, 2016; Castro, 2002a).

Instead, the TSR emphasizes the strategic role of *old or pre-existent* social representations in making sense of new or emerging ideas and new positionings. It is through social representations that the unfamiliar is made familiar through the processes of anchoring and objectification (Moscovici, 1988; Vala & Castro, 2013; Wagner et al., 1999). Anchoring is the process in which the unknown is inserted in already existing social representations, adapting new ideas within familiar understandings of the world. The process of objectification makes these categories real and tangible, for example, by personification, when a threat or an event is associated to a type of individual or group, like it happened in the initial stages of the COVID-19 pandemic when the virus was associated with China and Chinese nationals (de Rosa & Mannarini, 2020).

Meanings or social representations – the building blocks of social life - should then be the “stuff” of interest of social psychology (Moscovici & Marková, 2001). Its study requiring a multi-method and multi-analysis perspective (Farr, 1993) of societal “products [as] embodied in texts, language, folklore or even literature” (Moscovici & Marková, 2001, p.247) capturing the different means and directions of active and purposeful meaning-making and transformation. Moreover, the focus on communication and discourse has been favoured since the creation of the concept and theory (Moscovici, 1961/1976) and has been increasingly acknowledged in the development of the theory throughout the years (Castro, 2002a, 2002b).

### **1.2.1. On communication and discourse**

Communication and discourse reflect how meaning is undertaken, made sense of and transformed and their consequences for group boundaries in everyday interactions (Batel & Castro, 2018). It is through argumentative styles and communication modalities that meaning assumes a legitimizing or delegitimizing role, by including, or excluding perspectives and social representations of the Other (Jovchelovitch & Priego-Hernandez, 2015). Moscovici’s initial study about the modalities of communication employed by different newspapers (developed more in depth in the upcoming section 1.3.2. on mediating systems) reinforces his later statement that “thinking and arguing amount to the same thing” (Moscovici, 1988, p. 215). SR scholars have then emphasized how communication and discursive practices are at the heart of sense-making. A suggestion also made by Billig (1988), when elaborating on TSR through a rhetorical perspective, claiming that the “thinking” society should in fact be the “arguing” society.

This focus on language and communication within TSR has been in dialogue with the discursive approaches in social psychology (Castro, 2002; Howarth, 2006b; Voelklein & Howarth, 2005). Till this day many claim that there are far greater similarities than differences separating them, as evident in the amount of empirical work that try to combine these approaches (e.g., Batel et al., 2016; Batel & Castro, 2009; Boager & Castro, 2021; Castro & Santos, 2020; Howarth, 2002; Moloney & Walker, 2002 for an in-depth overview see Batel & Castro, 2018). The main criticism to TSR have been on the overly focus of mapping the content and structure of social representations without an important analysis to what they *do* to social life and social structures (Voelklein & Howarth, 2005). An analysis of communication and discourse can overcome this challenge (Gibson, 2015).

TSR's scholars have then looked at how social reorientations are strategically mobilized to re-inforce, or contrarily, contest certain views of the world in everyday communication (Howarth, 2006b; Maloney & Walker, 2002). Communicative acts presuppose the existence of one or multiple interlocutors, they are multivocal and dialogical (Marková, 2003) and could be said to reflect the workings of two domains. One relates to macro-social understandings/cultural repertoires, constructed, and maintained by institutions, governments, or the media, informed by histories and stories of communities, structuring social life (Elcheroth et al., 2011; Howarth, 2006b; Vala & Castro, 2013). The other domain regards the immediate interaction, the micro-level, eliciting positions in relation to the Other (Castro, 2015; Gibson, 2015; Maloney & Walker, 2002), emphasizing the pragmatic characteristic of communication (Batel & Castro, 2018). For example, in the situation of an interview for research purposes, for example, the interviewees may be aware that the dialogue is directed towards the scientist-Other and may elicit different ways of warranting their claims – and mobilize different social representations as a consequence (Castro & Santos, 2020). The analysis of communication and discourse makes it possible to explore the extent to which dialogue and exchange is happening – exploring whether communication is accommodating social representations of the Other, or whether the interaction is static and rigid, through processes that restrict and reject other representations (Gillespie, 2008, 2020a, 2020b).

Yet, communication and discourse can only happen because social representations are both shared –providing building blocks or shared themes– *and* because social representations are diverse and plural. If everybody shared the exact-same social representations there would be no need for communication at all (Castro, 2002a). The dynamic of consensus and diversity of social representations is the necessary basis for social life to structure and transform.

### 1.2.2. On consensus and diversity

The plurality and diversity of social representations suggest that different understandings of the world are possible (Jovchelovitch, 2007). The public is not monolithic, and one should not expect social representations to emulate a monochord – producing one persistent and consistent pitch (Zadeh, 2017; Jovchelovitch, 2007; Jovchelovitch & Priego-Hernandez, 2015) – like the term “collective representations” would allude to (Durkheim, 1898 cit. in Moscovici, 1988). In fact, it is probably more useful to think of social representations/everyday meaning-making as a polyphonic choir improvising exploring harmony and dissonance, that nevertheless are structured by tone and singing techniques (Vala & Castro, 2013 also uses the example of a jazz improvisation band).

Moscovici (1988) then proposes a taxonomy of social representations to understand the dynamics that make some social representations more widely shared, and others less. Social representations can be *hegemonic*, i.e. uniform and coercive across a structured group, like a city or a nation (Moscovici, 1988, p.221) they are imperative/prescriptive/pervasive, but not impossible to contest (e.g. hygiene practices are now taken-for-granted everyday practices, but they were originally legally regulated; Castro, 2012). These are representations in which there are no collective remembrance of how they have been incorporated in everyday life, and the tensions and debates around them are no longer acknowledged or disputed (Castro & Mouro, 2016). Often, they are institutionalized in (informal) norms or formal institutional facts, such as laws (Castro, 2012, 2015). Social representations can be *emancipated*, with some degree of sharedness, but groups and people can propose different perspectives to them (Moscovici, 1988). In this sense they are being articulated in contrast with other taken-for granted assumptions and representations, not in an antagonistic way, but in a complementary way (Mouro & Castro, 2012). This is the case of representations about mental health, on how experiential knowledge is entangled with medical knowledge in practice (Morant, 2006; Negura et al., 2020; Jodelet, 1983 cit. in Moscovici, 1988) Finally social representations can be *polemic*, responsible for dichotomous perspectives among groups and causing social polarization and antagonism (e.g., abortion in the current Polish context). These representations are usually connected to identities and draw strong group boundaries between the parties in conflict. Polemic social representations possess within them the meta-information related to the other groups and representations (Gillespie, 2008). This taxonomy, then, helps to map the processes involved in the power dynamics of stability and change of meaning, exploring how certain

representations become crystalized or, contrarily, more prone for transformation and accommodation of the perspective of the Other (Negura et al., 2020).

Furthermore, the plurality and complexity of social representations are also incorporated in the concept of cognitive polyphasia that emphasizes the adaptive function of the multiplicity of social representations, especially, within individuals (Jovchelovitch & Priego-Hernandez, 2015, Jovchelovitch & Gervais, 1999; Mouro & Castro, 2012). Seemingly contradictory ideas may be integrated in everyday life with an adaptive function, as individuals navigate and move between different communities and ideas, a strategy particularly relevant in the diverse societies people live in nowadays (Howarth et al., 2014).

For example, Jovchelovitch and Gervais (1999) showed how the Chinese community in England made sense of Western concepts of health and illness by integrating them in previous knowledge of Chinese traditional medicine. Interviewees showed complex webs of meaning and knowledge that were integrated in the struggles for identity as migrants in the UK. The complexity of the social world, as emphasized in such analysed processes of meaning-making, indeed “elucidates a central aspect of social representations: the intertwining of social representations, identity and community” (Jovchelovitch & Priego-Hernandez, p.169), although they do not necessarily possess a linear and circular relationship, i.e., social representations do not necessarily define identities and vice-versa (Wagner & Hayes, 2005).

Hence, social representations help groups and individuals to position themselves in relation to the world (Howarth, 2006b). Furthermore, and because this plurality exists – and social-psychological analysis make them more visible, then, (social) change can be conceptualized (Howarth et al., 2013; Vala & Castro, 2013; Howarth, 2006b). This is a characteristic that has been increasingly acknowledged and discussed throughout the development of the theory (Castro, 2002a, 2002b).

### **1.2.3 On change and stability**

The plurality of social representations and how they are in tension as ‘battles of ideas’ translate into how change and stability are “a daily achievement accomplished in the interplay of reproduction and invention” (Castro & Batel, 2008, p.494). TRS thus helps analyse the origins and transformations of these objects, rejecting the essentialized stance they often take, like it is, for example, with the essentialized idea of race (Augoustinous et al., 2015) or with the homogeneous assumption of national identity (Andreouli & Chrysochoou, 2015; Andreouli & Dashtipour, 2014; Billig, 1995). Moscovici (1984) warns of the dangers of “fossilizing” social

representations, i.e., taking social objects for granted. This is also the case for how we use theories and methods in social-psychological research, that need to be contextualized in time and place (Castro, 2015).

For example, Condor and Gibson (2007), although not following a social representations approach specifically, empirically demonstrate this idea well. By starting at how political participation is “fossilized” and “materialized” in a questionnaire, it critically addresses the ways in which young British people would “fail” to fulfil the questionnaire’s assumptions of conventional political participation. In fact, with interview data, it was shown how, in certain circumstances, the supposedly political disengagement (e.g. not voting) was being articulated to present sophisticated views of politics and citizenship and that they were not, as the questionnaire might have suggested, uninterested political subjects.

Thus, this theory proposes that more attention should be paid to *describing* social-psychological phenomena and their webs of relationships, as social representations in ‘battles of ideas’ - before *explanation* is sought (Moscovici, 1989). As TSR aims to explore social representations’ properties, origins, and impacts (Moscovici, 1984), it suggests looking at their transformations, and at their genesis as co-constructed phenomena (Castro, 2015) more visible if we take a temporal dimension and analyse the processes of *transformation* and *stability* (Batel & Castro, 2008; Negura et al., 2020; Staerklé, 2015).

Indeed, the view of ‘battles of ideas’ helps to elaborate the tensions that are trying to make some social representations more prominent than others: what representations are winning, what representations are losing and how the debate is being configured.

Recuperating the example of the polyphonic choir as an everyday popular practice, the harmonic richness from such singing practices was only acknowledged by music theorists and classical composers very recently. This example helps illustrate two important processes: (1) the everyday practices can influence ‘theoretical’ domains (Foster, 2003; Kronenberger, 2015; Jovchelovitch, 2008), but that (2) science and its theoretical assumptions tends to hold a legitimizing position (often “moral” Wagner & Hayes, 2005) de-valuing/de-legitimizing everyday meaning and practices (Campbell & Jovchelovitch, 2000). The example thus metaphorizes the difficulty of science and theory of embracing the mundane but nevertheless dilemmatic and complex realm of the everyday as a realm of purposeful and strategic meaning (Billig et al., 1988; Moscovici, 1988), as explored in the classic tension between science and common-sense (Bauer & Gaskell, 2008; Jovchelovitch, 2008).

Thus, the quest to rehabilitate everyday meaning as social representations is honouring the human capacity for the co-construction and transformation of meaning, helping to re-orient the

discipline of social psychology to focus on everyday life (Jovchelovitch, 2007). As stated by Jovchelovitch and Priego-Hernández (2015), ‘how the plurality inherent in human public spheres shapes knowledge outcomes and the structure of representational fields is at the core of studies of social representations.’ (p. 163). The importance of studying everyday meaning as social representations allows to look at people’s meaning-making processes as legitimate perspectives of the world (Campbell & Jovchelovitch, 2000; Jovchelovitch, 2007; Nelson & Prilleltensky, 2010). In this way, it offers voice and space to individual’s and group’s everyday lives, particularly important when these are disfranchised voices and perspectives (Teo, 2010; Zadeh, 2017).

In the next section the ways in which social representations are shaped within these battles will be explored, particularly by presenting the reified and the consensual spheres and their characteristics, inspired by the ways in which science, as a field of knowledge that ‘simplifies the world’ interacts with everyday meaning-making that is characterized by plurality and diversity (Batel & Castro, 2009).

### **1.3. The interaction of the reified and consensual spheres in shaping meaning**

The study of social representations is then the study of how certain meanings/social representations/perspectives are shaped and transformed and how some become more prominent than others (Jovchelovitch, 2007). Science, for instance, “occupies the highest rung” and is understood to be a rational and objective activity, of rational individuals that apply the scientific method to explore the world (Jovchelovitch & Priego-Hernández, 2015, p. 167). Everyday sense-making, however, and its collective nature, is allegedly at the bottom (Moscovici & Marková, 2001). The concept of the “thinking society”, however, re-interprets this view by showing how societies and ordinary people can think rationally, contrarily to popular belief (Jovchelovitch, 2008). Because of this tension the reified and consensual spheres have been conceptualized (Moscovici, 1961/1976; 1984, 1988), and this is the focus of this section.

In the theory’s original conception, science, and its characteristics, is part of the reified sphere (Moscovici, 1961/1976). It aims to establish rules, defining certain knowledges, meanings, and actions as the right ones, prescribing them to all (Moscovici, 1993), seeking to “rationally” organize the world (Morant, 2006). Contrarily, the sphere of everyday

meaning/social representations is the consensual universe (Moscovici & Marková, 2001). It is a heterogeneous, creative, and shifting universe that keeps multiplicity of meaning and action alive by accommodating different perspectives and points of view (Billig et al. 1988; Moscovici, 1988). Conceptualised in this way, the two concepts of the reified and the consensual become useful analytical tools for exploring the processes and dynamics involved in and resulting from the legitimation of certain representations over others (Batel & Castro, 2009; Voelklein & Howarth, 2005).

The most described path has been from science into everyday life (Moscovici & Marková, 2001). But even though this is the prototypical interaction, Moscovici does not ignore that science, and the reified sphere, are influenced by social representations (Moscovici, 1988), as later theorisations have also emphasized (Foster, 2003; Howarth, 2006a). The consensual sphere can be thought to be the basis for innovation influencing the field of science (Castro, 2012; Vala & Castro, 2013). For example, everyday health related meaning, as experiential, polyphasic and plural, can combine medical advice with everyday experience and knowledge (Foster, 2003).

The ways in which this exchange happens, however, depends on resources that are both material and communicative/discursive (e.g. Castro & Santos, 2020), so that social representations of the consensual sphere are seen as legitimate to enter the reified one. Moreover, it is by looking at the dynamics between the two spheres that is possible to analyse how meaning is transformed and constructed and their power dynamics (Moscovici, 1988; Batel & Castro, 2018; Castro et al., 2018). Ultimately, this framework offers the opportunity to explore how power operates instead of “explaining power through power” (Negura et al., 2019, p.3) by focussing on the psycho-social processes that make ideas and representations to become reified, and the processes involved in the ways in which these are helping structuring societies (Giddens, 1979).

The interrelated dynamics between spheres emphasizes how there is no real context in which the reified and the consensual spheres exist in a pure form. Naturally, the distinction between them is not an attempt to make them intelligible and real. Instead, “the interest lies in what logics the systems follow and what functions they fulfil” (Kronberger, 2015, p.359), particularly, their functions in structuring and transforming social life – either supporting the one and only configuration of the social world or acknowledging the presence of plurality and heterogeneity (Batel & Castro, 2009; Howarth, 2006a; Negura et al., 2020; Voelklein & Howarth, 2005). The spheres tend to reflect different ways of accommodating – or excluding – the perspective of the Other.



Batel and Castro (2009) argue that a “detailed descriptions of the two universes can also be taken as a proposal indicating “ideal type” arguments used in the debates” (p. 418), especially, when the reified sphere and consensual spheres are in interaction/clashing. The discursive format of reification help to present some representations as undeniable, nor offering space for other perspectives to be integrated. This is the example of dichotomic ways of communication in which the yes/no configuration guides the debate (Batel & Castro, 2009; Uzelgun et al., 2015). It is a form of de-legitimizing the Other, usually by emphasizing their stereotypical characteristics so their perspective is to be disregarded. Gillespie (2008, 2020a, 2020b) refers to this dynamic as the work of semantic barriers, discursive devices that minimize the perspective of the Other, and of alternative representations. There are three possibilities in which barriers are drawn and dialogue is hindered (Gillespie, 2020a): it could lead to not acknowledging the perspective of the Other at all, dehumanizing them; it could acknowledge others but delegitimize them as irrational or ignorant; and finally, a situation in which the perspective of the Other is not dismissed, but their impact is minimized.

Moreover, it is not only the sphere of science or the works of the scientific method that comprises the reified sphere (Jovchelovitch, 2008). The realm of deliberative politics, although it stands on the premise of political debate, has sometimes been presented as morally constructed, guiding the debate in which political decisions and laws are created (Mouffe, 2006). In this sense decisions are made – and reified – based on what is “good” governance, delegitimizing what is seen as “bad” in an antagonistic way (Brown, 2016).

Evidently, these collective decisions and priorities can draw from scientific/evidence-based priorities such as mitigating climate change challenges that enter the realm of politics to create laws and institutions to tackle them (Castro, 2012). Often these ideas are presented as a necessity – instead of a contingency that can be debated and transformed – assuming that collective agreements are created to stabilize the one and only course of action, delegitimizing other perspectives to co-exist in the process (Castro, 2019). The realm of ‘politics’ (Mouffe, 2006) of the reified sphere, thus, is a domain in which meaning is constructed in a dichotomic way, assuming that there are other perspectives and Others that, necessarily, cannot be included in a given moment (Moscovici, 1984, 1988). These priorities, however, can change over time and debates around them are still possible.

The realm of the consensual sphere, on the other hand, is plural and diverse, and, ideally, diversity of representations and perspectives are embraced and acknowledged (Moscovici, 1984). As an argumentation type, the plurality and diversity characteristic of the consensual sphere allows to better accommodate other perspectives, associated to non-dichotomous views

of the world and dialogical relationships. Consensualisation (Batel & Castro, 2009) could be signalled by the discursive construction in the “yes... but” formulation (Batel & Castro, 2008; Uzelgun et al., 2015). Even though boundaries are still drawn, this sphere acknowledges the perspective of the Other and the diversity of representations and action. This is the domain of the ‘political’, according to Mouffe (2006), a place of struggles but where different perspectives are debated by sharing a common ground. Examples of this type of argumentation and interaction involve an awareness that representations are multiple and hybrid, as well as action, acknowledging its context dependent nature (Batel & Castro, 2009).

In the encounter of the two spheres, the tension between forces that tend for establishment, against the forces that tend for transformation and pluralization become more evident (Gillespie, 2020b). Conceptualizing the spheres and their dynamics and functions, thus, assists on the creation of a model of how change and stability are achieved. This perspective helps to conceptualize how societies are structured, but importantly, how they are limiting alternative representations (Castro, 2019; Gillespie, 2008, 2020b). In the encounter of spheres, resources, that can be material or discursive, are important for the legitimacy of this interaction and for putting forward alternative representations (Castro & Santos, 2020; Foster, 2003; Gillespie, 2008; Jovchelovitch & Priego-Hernandez, 2015). Laws and institutions are an example of arenas in which the logic of the reified sphere is present (Castro, 2012, 2015, 2019). In the next section we will look at the dynamic of the reified and the consensual spheres in reifying representations in laws and institutions as formal norms that are in interaction with everyday life.

### **1.3.1. Laws and institutions: (national) collective agreements stabilized in the reified sphere re-entering the consensual sphere**

Laws and governing institutions are part of the reified sphere because of the functions they perform and as an expression of collective agreements that were institutionalised at the level of the state (Castro, 2012, 2015, 2019; Castro & Santos, 2020) - they are “an expression of state power” and a “central mechanism of social power” (Deakin et al., 2016 p.3-4). This section puts forward a perspective that explores the interdependent and dynamics relations between the legal/institutional sphere and the consensual/common sense one in constructing and shaping meaning. Their interdependent nature is often understudied, particularly, in conceptualizing the role of laws and institutions in social psychological phenomena.

Castro (2019) argues that institutions allude to a premise that seems to have been neglected: they result from collective agreements aimed at defining the limits of human action, made to structure social life. Castro (2019) then sketches three main features of institutions following Searle (2005) and legal institutionalism (Deakin et al., 2016): (1) institutions – institutional facts – derive from collective decisions of a system of rules; (2) language provides the basis for representation necessary for creating and acknowledging their structuring function; (3) institutions can be informal, like norms, and formal, inscribed in written guidelines such as laws.

Thus, laws and institutions result from decisions made about values and representations that are seen as legitimate (Castro & Santos, 2020; Negura et al., 2020; Scuzzarello, 2012) (particularly true in non-totalitarian regimes) - then stabilized in institutions and re-enforced in society. National laws incorporate values and representations resulting from choices that are made formal. In this process, some values and representations necessarily have to be excluded and left aside. This selection, then, could be said to simplify the heterogeneity of meanings existent in a nation. This characteristic makes laws and institutions part of the reified sphere (Bertoldo & Castro, 2019; Castro, 2012; Castro & Santos, 2020). They function to structure societies and are given legitimacy, particularly, in democratic systems, by processes of consensus and deliberation (Mouffe, 2006).

However, even though laws are intended to produce wide-spread homogenous practices and aim to become wide-spread – to become hegemonic representations/informal norms - it is not always the case (Castro, 2012; Castro & Santos, 2020). They can remain contested throughout time. Moreover, the creation of laws privileging certain (shared, consensual) values and representations, does not make contradictory ones disappear (Moscovici, 1988). Sharedness at the level of the consensual universe of a nation is inevitably imperfect: not all individuals and groups will share the reified values and representations in a nation; and not all individuals and groups will always prioritize them in the same ways (freedom over security, or vice-versa) (Barnes, et al., 2004; Castro, 2015, 2019; Tuffin & Frewin, 2008). The values and representations inscribed in laws, however, can be presented/communicated as re-enforcing their hegemony, through their institutional power and binding effect (Negura et al., 2020). Very much like the reification as a discursive format, laws, in their textual formulation, propose what is right or wrong. They offer, in principle, little space to alternative types of knowledge and representations to enter their meanings (Elcheroth et al., 2011).

The citizenry, as part of the consensual sphere, is the space of plurality and heterogeneity (Batel & Castro, 2008). Social representations are then strategically mobilized to make sense

of these reified meanings, accepting, or contesting them within their own references (Mouro & Castro, 2011). But is also in this domain that innovation happens too (Castro, 2012). Moreover, there are two paths in which laws and regulations interact with the polity: (1) one path is when values and representations of the consensual sphere work their way towards the reified. In the plurality of the consensual universe new ideas disseminated sometimes reach some consensus, originating new institutions and laws for a nation (Castro, 2012; Castro et al., 2018; Staerklé, 2015); (2) a second path is from the reified to the consensual sphere, when new laws and institutions are implemented and are integrated in the everyday consensual sphere. Legal innovations (Castro, 2012) enter the polity with the goal of changing behaviours and discourses.

### ***1.3.1.1 The different stages of law implementation***

Castro (2012), by taking the example of biodiversity protection and climate change mitigating measures, explores the paths and processes in which the collective agreement of ‘environmental protection is a necessity’ is inscribed in laws. The creation of these institutional facts aims at changing behaviours and discourses towards pro-environmentalism in society. The model of how laws are introduced in everyday life of the citizenry is conceptualized in 4 stages. The stage 1 is the *emergence stage*, in which a minority puts forward an idea, then it gains societal relevance, and when it does, it is *institutionalized* (stage 2). In here, the representations from the consensual are worked out into its reified form, with different actors participating in the translation into legal and institutional regulations, at times, creating new institutions to especially deal with them. Then the *generalization phase* begins, stage 3, when laws are put into practice and are being presented to the polity by mediating systems to integrate them in everyday life. Then, finally, in the last stage of *stabilization*, the proposals of the law, and their representations, are fully integrated in society.

The development of each stage inevitably involves battles of the best ways in which certain values and representations can be adapted to everyday. For instance, in the *emergence stage*, all spheres in society participate in the struggles over important representations and ideas. At times, these ideas are directly integrated in parliamentary debates, not only because of societal needs/voices, but scientific evidence only (Castro, 2019). The battles involved in this phase could account for bottom-up processes of change and require an in-depth exploration as to why and how ideas and representations become prominent rather than others (e.g., collective action, van Zomeren et al., 2008). Inevitably, the emergence stage reflects the democratic processes in

place (Mouffe, 2006) - and the levels in which the diversity of the consensual sphere is integrated.

In the *institutionalization* phase, institutions are created to put the reified meanings of the law into practice. In this phase different groups can claim the creation of laws in particular ways, involving different processes of implementation, although not all of them can be successful. Laws can be created in vaguer terms and more open to re-signification in practice, or be more prescriptive, closing down the interpretation involved (Castro, 2012; Batel & Castro, 2009). New institutions can be created to fulfil new roles for re-enforcing new agreements (Castro & Batel, 2008).

The *generalization* phase is when the reified proposals of the law get to be in contact with the consensual everyday sphere more broadly. Institutional mediating systems will have the possibility to re-adapt the reified meanings of the law, and the representations they carry, considering institutional cultures and individual social representations (Ribeiro et al., 2014). More broadly, this is when new ideas are presented to the public sphere. Here, a range of reactions are to be expected when new laws are implemented depending on their binding effects. Depending also on whether these are related to the private or public sphere or regulate directedly individual behaviours or intergroup relations (Castro, 2012). Laws can be received with acceptance, contestation, or ambivalence (Castro, 2012; Castro et al., 2012, 2018; Castro & Mouro, 2011; Batel & Castro, 2009; Mouro & Castro, 2012).

For instance, the ways in which biodiversity protection laws reconfigure a professional activity, such as artisanal fishing in the study by Castro and Santos (2019), artisanal fishers made use of other values from the consensual universe, such as those associated with civic and democratic citizenship, to contest the proposal of ecological citizenship brought up by the law. As well, naturalization laws when implemented may not be widely endorsed and defended by the citizenry (Reijerse et al., 2015). This mismatched dynamic is nourished by the plurality maintained alive in the consensual sphere (Billig et al., 1988) where agency and transformation can then find their space in making sense of the reified proposals of the law (Batel & Castro, 2009). Furthermore, the lack of coordination between action and discourse can endure for as long as – if ever – stabilization is achieved (Castro, 2012).

This model highlights the ongoing struggles in making sense and in translating the collective agreements into everyday meaning and practices by different social actors. It could be said that laws, carrying reified meanings, values, and representations later re-feed the consensual universe with new tensions and dilemmas. Mediating systems are thus crucial in this dynamic in which collective agreements, as abstract ideas, gain form and structure society

through institutions and practices. These systems are the point of contact between the legal/expert systems and the public (Castro & Batel, 2008, Caillaud et al., 2020). They can thus integrate the reified and the consensual spheres in ways that can better accommodate and acknowledge the plurality of meanings and perspectives that is characteristic of the public sphere (Morant, 2006; Morant & Edwards, 2011; Renedo & Jovchelovitch, 2007).

### **1.3.2. Mediating systems integrating the reified and consensual spheres**

Mediating systems integrate the reified and consensual spheres in everyday life (Caillaud, et al., 2021; Castro & Batel, 2008, Morant, 2006, Morant & Edwards, 2011). They are the point of encounter between these systems of meaning tangible in time and space in the encounter between Self and Other(s), and where the perspective of the Other can be denied or recognized (Caillaud, et al., 2021). These mediating systems, however, can be more of the side of the reified sphere, such as institutions in charge of creating and implementing laws; or at the side of the consensual sphere, as mediated forms of communication, such as social media, the press or TV. Both systems work to present the reified proposals - new laws, and ideas - to the public and integrate them in everyday life. The analysis of the argumentative styles and modalities of communication are important to explore the ways in which these reified ideas are enacting 'battles of ideas' by including the perspective of the other/alternative representations in the process (Gillespie, 2008), particularly important for an increasingly democratic inclusion/participation of the public(s) in state affairs (Batel, 2010).

#### ***1.3.2.1. Formal/expert mediating systems***

Laws and regulations – the reified sphere – are institutional facts of the social world (Searle, 2005). The encounter between the reified sphere and the consensual sphere happens in these domains of practice. This interaction shapes the ways in which decisions at the state level are translated into institutional cultures, either minimizing or maximizing the transformations proposed by laws and regulations (Castro, 2012; Caillaud, et al., 2020; Renedo & Jovchelovitch, 2007).

So far, research with expert systems has shown, for example, how experts in urban development can re-interpret public participation laws in ways that minimize the public's opportunity to participate (Castro & Batel, 2008). In relation to mental health, where more research has been conducted, it has been demonstrated how mental health experts integrate

theory – as a reified form of knowledge – with everyday experience to design treatment plans for their patients (e.g., Foster, 2003; Morant, 2006; Negura et. al. 2020) but that they simultaneously struggle to integrate patient’s experiences and concerns in their practice (Foster, 2003). These practitioners do this by not including an awareness of the perspective of the Other – research shows their difficulties in mobilizing emancipated representations in making sense of mental health treatments (Negura et al., 2020), or, in other words, in integrating discursive formats that confer *consensualisation* (Batel & Castro, 2008).

Expert systems, even though they integrate knowledge from the consensual sphere for making sense of reified meanings (Morant, 2006), tend to resort, however, to *reification*, as their meanings are presented as undeniable facts. Professionals are in the interface of different meaning systems and are co-creators of polyphasic meaning (Renedo & Jovchelovitch, 2008).

For example, in social psychology, there is little reflexivity in relation to the processes in which the reified knowledge is populated with the consensual/everyday knowledge (e.g. how social representations of attitudes have informed social psychological theories of attitudes, Howarth, 2006a). Psychological science and theorization fail to acknowledge that, at times, at the basis for interpretation of data there are social representations of the world (Teo, 2008, Teo & Wendt, 2020) and that their findings have consequences for the stabilization of the *status quo*, instead of contesting it (e.g., research on racism, Howarth, 2006a). By presenting psychological findings as ideology free and value free, it hides the ways in which the consensual sphere is incorporated in scientists’ motives for research (Teo, 2008) and inserted in institutional norms of ‘publish or perish’ that has oriented much of the research conducted (Gjorgjioska & Tomicic, 2019).

In relation to laws, the role of the legal experts in integrating reified notions with everyday social representations depend on the phase of law implementation. In the institutionalization phase choices of values have been made, but other decisions – or ‘battles of ideas’ – are required. These battles of ideas will both incorporate the “why” question –why these are chosen values– and the “how” question – how those values are materialized into practices.

In this period, new institutions are created, as it was the case with environmental issues (Castro, 2015) or in the case of implementation of laws to promote the inclusion of people with learning disabilities in different areas in society (Caillaud, et al., 2021). Thus, the ways in which institutions are created and their practices are designed require the participation of ‘battles of ideas’. Social actors/experts will mobilize different meanings to design how such laws need to be implemented and put into practice, including, psychologizing the audience and by including psychological concepts in their practices (e.g. a repertoire of “effort” to make sense of social

provision, Anderson & Gibson, 2020). These examples emphasize the interdependence of the institutional and everyday meaning in these dynamics (Castro, 2012; Elcheroth et al., 2011).

Then in the phase of generalization, in which practices are needed to be operationalized, other ‘battles of ideas’ are in place. Often institutions need to incorporate institutional facts in their everyday interaction with the public. Here, legal experts need to resort to *interpretation* in deciding institutional practices and guidelines for action. Again, in these processes they can tend to resort to reification or consensualisation in the interaction with the Other (Batel & Castro, 2008).

Experts can unreflexively impose rules for action without awareness of other values and perspectives or they can analyse the context specific nature of laws when applied to everyday life. Yet, experts and their institutional practices can consolidate meaning and structuring power relations in their everyday practices (Bloemraad, et al., 2019). Thus, analysing the meanings these systems mobilise is a way of exploring the dynamic relations between the two universes of the reified and the consensual, their interdependent nature and the power mechanisms they are creating (Negura et al., 2020).

### ***1.3.2.2. Mediating systems for mass communication***

Other mediating systems participate in the processes of integration of the reified and the consensual spheres, like the press, the TV, or social media. Mediated forms of communication are important arenas in which ‘battles of ideas’ are played (Carvalho, 2008) and have an important role in the transformation or stabilization of social representations (Amer & Howarth, 2018; Boager & Castro, 2021; Castro et al., 2012, 2018; Jaspal et al., 2013; Joffe & Haarhoff, 2002; Moscovici, 1961/1976; Santos et al., 2020)

These mediated forms of communication introduce the reified legal proposals of laws to the public (Castro et al., 2012, 2018) in the *generalization* phase (Castro, 2012). The ways in which these vehicles take on the reified meanings of the law and present them to a wider audience can involve the re-signification and/or transformation of those ideas (Amer & Howarth, 2017; Jaspal et al. 2013; Santos et al., 2020). This process of resignification can result in different forms of communication modalities to gain the support, or contrarily, to entice contestation and resistance over the reified meanings (Boager & Castro, 2021). It is in mediated communication that Self-Other relations and group belonging can be constructed, stabilized, or transformed (Batel & Castro, 2018; Castro et al., 2018; Moscovici, 1972, 1988).



Depending on the type of communication adopted, these forms may serve the function of social influence by enforcing or contesting group boundaries (Duveen, 2008; Amer & Howarth, 2018). An example is of the Bulgarian resistance in deporting Jews in World War II, where public documents mobilized common identities to foster social solidarity (Reicher et al., 2006)

In the tradition of social representations, mediated communication construct three different modalities of communication, expressing different degrees of integration of the reified and the consensual in Self-Other relations: propaganda, propagation and diffusion. These modalities were also associated with different ways of eliciting psycho-social processes, respectively, propaganda was associated with stereotypes (in order to delegitimize the perspective of the Other), propagation was associated with the creation of attitudes, and diffusion was associated with the creation of opinions (Howarth, 2011; Duveen, 2008).

Thus, *propaganda* is a modality that presents one vision as in stark contrast with the Other, presenting it in a dichotomous way, similarly to the process of *reification* (Boager & Castro, 2021). For example, when new laws are concern, this discursive modality can re-enforce “the primacy of the law” (Tuffin & Frewin, 2008;) above all other values and representations (Castro et al., 2012). But this modality can also be driven to provoke severe criticisms to the laws in place and contribute to social polarization (Gillespie, 2008). This modality serves to develop an ideological commitment and in-group solidarity, distinguishing them from the out-group (Duveen, 2008). In Moscovici’s work (1961/1976), this modality was identified in the press of the Communist Party, that presented the proposals of psychoanalysis as associated with American stereotypes of cultural erosion and imperialism, with the aim of de-legitimize psychoanalysis as a field of knowledge and practice.

*Propagation* is a discursive format that aims the opposite, advocates moderation, and shows awareness of competing views, and dialogues without direct opposition of the main representation the law proposes. It nevertheless emphasizes different group belonging. This was the case of the discourse of the Church discussing psychoanalysis as explored in Moscovici’s work (1961/1976). The Catholic church accommodated some of psychoanalysis proposals and ideas to existing religious practices (e.g., confession). This integration would help the Catholic audience develop attitudes to psychoanalysis that were consistent with their beliefs and still aligned the Church’s authority (Howarth, 2011). The mode of *consensualisation* relates to this communicative modality, as it incorporates the perspective of the Other (Boager & Castro, 2021).

Lastly, *diffusion*, is a communicative modality that disseminates information (Castro et. al, 2012; Wagner, et al., 1999). This communication modality shows no attempt to integrate any

opposing views, as information is presented in an unaffected way. In Moscovici's (1961/1976) seminal work, this modality was identified in the debated by liberals, that helped the public create an opinion about psychoanalysis. Duveen (2008) described it as a way of developing sympathy among the targeted audience. It is a form of "closed, monological system of communication" (Staerklé, 2015, p. 295), nevertheless, not emphasizing a conflict with the Other.

We could argue that the diffusion modality does not necessarily integrate new ideas in the public sphere within the plurality and struggles over meaning. In these cases, it is probably worth analysing what is *not* being said (Billig, 1999) because meaning always presuppose dilemmas, choices, and opposition in relation to something else (Moscovici, 1984). Diffusion can also work to legitimize or delegitimize ideas in the public sphere, particularly relevant with new ideas, through processes of anchoring and objectification (de Rosa & Mannarini, 2020; Staerklé, 2015). Ultimately, diffusion provides with "large-scale social order narratives and systems (...) taking the form of "hegemonic" representations" (Staerklé, 2015, p. 287).

Indeed, most social psychological studies have investigated mediated communication in the press/media, looking at highly debated topics (Amer & Howarth, 2018; Jaspal et al. 2013; Castro et al., 2018). In these types of research, a division is made between the different parties of the conflict, reflected in the creation of the newspaper contents intended for a specific audience (Castro et al., 2012, 2018; Boager & Castro, 2021). Some of this research may look at opinion articles only to explore the argumentation processes more thoroughly (e.g., Kadianaki et al., 2020).

However, descriptive news articles, particularly in mainstream forms of mediated communication, signal that some topics may not be under heated debate: are unproblematic (Duveen, 2008; Staerklé, 2015) – although they may be received by the audience in more complex ways (e.g. Marková & Wilkie, 1987). Still there were choices made about how information was diffused, themes associated to them that helps the public's sense-making, at times, making *alternative representations* less prominent and visible (Gillespie, 2008). Some authors argue that diffusion is characteristic of the initial period in which a new social object enters society (Staerklé et al., 2011).

Different ideas and events such as psychoanalysis (Moscovici, 1961/1976), new foreign residency laws (Santos et al., 2020), the COVID-19 pandemic (de Rosa & Mannarini, 2020) or turistification in Lisbon (Boager & Castro, 2021) are integrated into familiar representations and values, so societies can navigate them. The press offers the 'raw material' to make sense of new phenomena. For example, in case of AIDS, the initial phases of the disease showed a

moralizing stance of what constitutes promiscuous behaviour (Marková & Wilkie, 1987) helping to establish positions in which the debate developed in the moments after. In the present COVID-19 pandemic, in its initial stages, it was also diffused through “Othering”: the virus was presented as a foreign object of the Chinese context, and of the Chinese people, contributing to stigma and prejudice (de Rosa & Mannarinni, 2020).

Moreover, laws can enter the public sphere already sedimented in a heated debate with clearer sides and tensions, or new ideas can be anchored into existing knowledge – that does not have to be especially problematic or an “open battlefield”. Mediated forms of communication using different communicative modalities contribute to a ‘common field’ of representations and meaning and can help to establish hegemonic representations that are not necessarily widely-shared – but are pervasive (Staerklé, 2015).

One of such pervasive ideas of contemporary societies is the idea of individuality and individual will (Howarth et al., 2013), accentuated by neoliberalism as a political rationality (Brown; 2015, 2016; Ong, 2006, 2007), that will be explored more in depth in Chapter 3.

#### **1.4. Concluding remarks**

In this chapter the Theory of Social Representations (TSR) was presented along with its processes and key-concepts (Moscovici, 1961/1976; 1972, 1984 1988; Moscovici & Marková, 2001). Social representations are at the core of how individuals and groups make sense of the world (Howarth, 2006; Vala & Castro, 2013; Voelklein & Howarth, 2005; Wagner et al., 1999). The concept – that became a theory (Castro, 2002a) - emphasizes the co-created nature of meaning within the triangle of “Self-Other-Object”. The focus on this dynamic brought a renewed attention to a focus of a “social” social psychology in the discipline (Farr, 1996).

Some scholars understand this theory as a theory of common-sense (Bauer & Gaskell, 2008) and of social change (Howarth, 2006b). This is noticeable in how TSR concentrates a field of work that has the theoretical and empirical focus on the transformations of everyday meaning in society (Moscovici, 1988).

This malleability of social representations in action helps to conceptualize the tension between stability *and* transformation (Batel & Castro, 2009; Staerklé, 2015). This means that certain social representations are more widely shared and accepted, making them hard to contest, although it is not impossible (e.g. hegemonic social representations, Moscovici, 1988), while other representations can be seen to express minority groups wanting to contest established

understandings of the world (e.g. polemic social representations, Moscovici, 1988). In Moscovici (1961/1976) seminal work, this concern was applied to how psychoanalysis was integrated in the Parisian society, i.e., how science was incorporated in everyday meaning making.

Concepts such as the reified and the consensual spheres help to explore these dynamics of change (Castro, 2012). By drawing on this analytical distinction between the two, a better grasp is given to the configurations of social representations, or ‘battles of ideas’, and the power dynamics associated with these struggles over meaning (Batel & Castro, 2009). The reified sphere presupposes a type of meaning that has been “rationally” decided/agreed and is associated with dichotomous views of the world – describing what is good or bad or what is a necessity (Castro, 2019) – in contrast with meaning that is co-constructed by societies, in the realm of common-sense, characterized by plurality and malleability (Bauer & Gaskell, 2008; Jovchelovitch, 2008).

Laws and institutions, or institutional facts, are seen to be part of the reified sphere (Castro, 2012). Drawing on the interaction between the reified and consensual spheres, it is possible to explore how institutional facts help shape everyday life and how they are incorporated, accepted, or contested (Batel et al., 2016; Mouro & Castro, 2012) and the power dynamics associated with them (Negura et al., 2019).

These dynamics of interaction are particularly noticeable in mediating systems (Castro & Batel, 2008) that can be on the part of the reified (experts) or the consensual sphere. Examples of expert mediating systems are institutions that translate institutional facts into concrete practices – integrating meanings that part of the reified and the consensual spheres (Morant, 2006; Renedo & Jovchelovitch, 2007). Mediating systems part of the consensual could be forms of mass communication where new laws – meanings and values of the reified sphere – are presented to the public, and where the public can express their position in relation to them (Castro et al., 2018; Kadianaki et al., 2020)

Overall, this initial chapter paves the theoretical orientation of the present dissertation. The focus of the present work is on how meanings or social representations are shaped in the interaction between the reified and the consensual spheres in relation to a thematic field: the disputed meanings of citizenship in relation to foreign residency (Bloemraad, 2018; Bosniak, 2006). The analysis of this interrelated dynamic foments a multi-level and multi-methodological approach to explore these struggles from different perspectives.

The conceptualization of the reified and consensual spheres and its mediating systems (Castro & Batel, 2008) aid in the design of the empirical studies – focussing on different

domains in which citizenship is expressed, made-sense of, and where the struggles for (legitimate) meaning are more prominent. The next chapter will then present the recent field of the social psychology of citizenship in dialogue with citizenship studies more broadly, that offer an approach to migration and mobility that is context-sensitive to the struggles over who is deemed a member of the polity.



## CHAPTER 2

# **The multiple shapes of citizenship: an overview of the social psychology of citizenship for the study of foreign residency**

### **2.1. Chapter presentation**

In this chapter we consider the study of citizenship to be an important framework for the social-psychological studies on mobility and migration (Bloemraad, 2018; Bosniak, 2006; Jopkke, 2007). This approach will allow to explore how foreigners are included in and/or excluded from a society and how they claim their rights to residency and mobility (Stevenson et al., 2015; Andreouli, 2019). We will first show how this approach is positioned in relation to the broader study of the interaction between society and migrants (Verkuyten, 2018). Then we will show the advantages of approaching those issues drawing from the social psychology of citizenship (Andreouli, 2019; Condor, 2011; Stevenson et al., 2015) and following the proposals of the TSR (Moscovici, 1988) by including and analysing (1) the co-constructed nature of the meaning of citizenship, in the interactions with the reified sphere of laws and the consensual sphere of the everyday (Castro, 2012); (2) the discursive struggles over citizenship reflected in the political nature of everyday ‘battles of ideas’ (Andreouli, 2019); (3) the tension between structure and agency as being the core of citizenship studies (Giddens, 1979), just like the reified and consensual spheres as seen in Chapter 1. In this chapter, an overview of the recent field of the social psychology of citizenship is presented, by emphasizing the different domains of citizenship in which it can be explored. Firstly, in relation to the institutional side of citizenship – as the reified sphere – and its everyday configuration – the consensual sphere. Secondly, in relation to the constructed locations and limits of citizenship, that in context of international mobility, spans across different geographic contexts. The whole body of work emphasizes the importance of theorizing citizenship as claims-making in different domains and locations to analyse how contemporary societies are shaping citizenship – and affecting mobility flows in the process.

## **2.2. Introduction: how does citizenship matter in the study of migration, foreign residency, and mobility?**

Societies are being faced with increasing flows of migration, forcing them to make sense of and deal with ethnic and cultural diversity (Howarth et al., 2014). In Western European countries there have been attempts to support diverse and multicultural societies. However, research has pointed to increasing negative attitudes towards migrants by Western countries in the last years (Salvatore et al., 2019), in response to a public discourse of the ‘failure of multiculturalism’ (Howarth & Andreouli, 2012).

This sentiment has repercussions in foreign residency/migration policies at the national and European level. Some countries have progressively closed the doors to the migrants, while enforcing facilitating policies for high-skilled migrants or with investment capabilities (Mavelli, 2018; Mitchel, 2016; Shachar, 2017). Also, countries such as the USA have progressively endorsed tougher border control and policies and the UK opted for Brexit, with some of the arguments being to regain border control (Jetten & Esses, 2018). This anti-migration sentiment has also been fomented by right wing populist parties that are growing across Europe (Mols & Jetten, 2014), including in Portugal.

In the last 20 years social psychology has focussed extensively on the issues of how host societies understand migration and whether they are willing to welcome migrants. There are different trends in the literature that look at these dynamics and we will provide a very brief overview of such trends (following Jetten & Esses, 2018 and Verkuyten, 2018) before we extend it to the social psychology of citizenship to explore such dynamics.

The first bulk of literature relates to the issues of how people make sense of “who belongs” looking at the role of identity within its content and dynamics. This literature explores how identities can become – more or less – inclusive of the migrant-Other through the lens of intergroup relations and of the salience of social identities (social identity theory, Tajfel & Turner, 1986, and self-categorization theory, Turner et al., 1987). Within this intellectual endeavour, some researchers have recently started to look at citizenship, as a form of national identity and belonging (Verkuyten, 2018). This research has analysed how different types of citizenship representations – either ethnic or civic – may predict intergroup outcomes. For example, it has been demonstrated that people endorsing civic representations of citizenship – i.e., belonging in the national identity is defined in relation to civic participation in society (e.g., in the economy) – is associated with the endorsement of policies that facilitate migrants’



integration in society (Reijerse et al., 2013, 2015). Contrarily, ethnic representations of citizenship, a *jus sanguinis* type of representation of citizenship that considers ethnic homogeneity the necessary definition for belonging, is associated with worse intergroup outcomes (Reijerse et al., 2013, 2015).

The second bulk of research focusses on “how to get along” exploring, for example, the role of perceived threats or benefits in how migrants are made sense of (e.g., Tartakovsky & Walsh, 2020 that combines both with a threat-benefit model).

Research on threat has received, along the years, far greater attention than the role of benefits (Verkuyten, 2018). This literature on threat is usually guided by intergroup threat theory (Stephan & Stephan, 2000) that assumes two different types of threat: realistic threat, that comprises of physical and economic threats (Shin & Dovidio, 2018) and symbolic threat, as a threat to the host society’s way of living (Stephan & Stephan, 2000). Research has showed that individuals that perceive other migrants as threatening – that can be combined or individually assessed –, will have more negative attitudes towards migration in general, or towards a migrant group in particular (Savaş et al., 2021).

Other research is exploring the role of the perceived benefits of migration. This is still an underexplored topic. One example is the perceived indispensability of migrants to the host society, playing the role of helping to shape positive attitudes towards newcomers (Guerra et al., 2016, Verkuyten et al., 2014). The literature on indispensability specifically, assumes two forms of indispensability: functional and identity (Guerra et al., 2016). Functional indispensability relates to the perception that a given group is necessary for society’s social and economic development. Identity indispensability relates to the role of the other group in constructing a common superordinate identity. Research shows that emphasizing indispensability and contributions is associated with positive attitudes towards migrants (Guerra et al., 2015; 2016; Tharavalou et al. 2021; Verkuyten et al. 2014)

The third bulk of literature regards the role of context in helping shape the host society’s position in relation to the entrance and integration of migrants. It is possible to identify in the literature different ways in which “context” is defined.

### **2.2.1. The role of context in the reception of migrants**

Commonly, context is defined in relation to the nation-state (e.g., testing differences between countries, Guimond et al., 2013). Recent research, however, has called for more local-based approaches in understanding context. This literature focusses on the dynamics of certain

neighbourhoods and cities, according to its demographics and the possibilities/opportunities for contact and interaction between groups (Bettencourt et al., 2019; Di Masso, 2012; Scuzzarello, 2012). A local perspective will help to assess, for example, if a majority-minority framework is applicable in the analysis of a particular case of intergroup relations (Verkuyten, 2018; Zisakou & Figgou, 2021).

Context can also be defined in relation to the migration policies in place (Diaz et al., 2011; Esses, et al., 2001). Research has shown that presenting to participants policies that help to ensure the economic integration of migrants influences the host society's perceptions of threat in relation to them. This is because migrants were seen as threatening and in competition for resources and jobs with the host society. Huo and colleagues (2018) showed that presenting participants with state-level policies in supporting the integration of migrants, influenced White Americans positive attitudes towards them, if migrants were not presented as increasing in numbers.

However, most of these studies use a language of 'perception' when discussing these contextual and policy related influences. By doing this, this research does not assume that "psychological understandings always involve a political dimension in the sense of being embedded in a wider understanding of how social relations are organized in the world" (Elcheroth, et al. 2011; p. 730), i.e., that context and the individual are not two separate entities.

This dissertation thus defends that an attention to the dynamics in which individuals and groups co-create meaning, is a better alternative than such an approach that focusses on the perception of the social context. Instead, the proposal is to explore how context is lived and made sense of. For this, it is crucial to explore the *interactional* dynamics in the everyday experiences with alterity and how it influences intergroup relations (Andreouli & Howarth, 2013; Castro, 2012; Castro et al., 2018; Gillespie et al., 2012).

For example, research has showed how different public discourses are shaping representations of migrants and migration – and affecting how they may be perceived as threatening (Verkuyten, 2005). Other research tried to show that the ongoing exposure to certain topics in the media can influence the ways in which a certain group can also be seen as threatening to the economy and in the access for jobs (Valentino et al., 2013).

These public discourses can influence whether a group of migrants are seen as indispensable either in functional or identity terms. For example, shared history shapes the ways in which indispensability can predict certain intergroup outcomes (Guerra et al. 2015). In Portugal, given its colonial past, African immigrants were seen as indispensable to the definition of the Portuguese national identity, and this was negatively associated with social

distance towards them. Ukrainian immigrants, on the other hand, because of their recent migration and their success in insertion in the job market, were seen as more functionally indispensable, and, through that, more positively (Guerra et al. 2015).

Our approach also considers that the macro-level should be analysed in relation to the the meso-level as well (Silka, 2018). In this way, everyday institutional interactions need to be taken into consideration when analysing how migrants are being received – that could include interactions with the health, education and law enforcement systems (e.g. in the airport, Blackwood et al., 2015; in schools, Figgou, 2018; or in interactions with the police, Morant & Edwards, 2011).

The analysis of these dynamics requires not only an attention to how laws and institutions in place legitimize certain perspectives and expectations of who is the *good* citizen, but also, it requires an analysis of how *citizens* themselves are responding to such frameworks and claiming their rights in these institutional interactions and outside them.

This would necessarily require an understanding of citizenship that is not exclusively a form of national identity – or a form of individually experienced identity (Reijerse et al., 2014). Citizenship is “a status of legal and political membership of a state” (Verkuyten, 2018, p. 226) that is already enforced to migrants the moment they enter a particular nation-state because of foreign residency laws. The political apparatus guarantees the rights and duties of foreigners and legitimizes certain “paths” for their integration. These paths design certain expectations and are shaping the ways in which they can be considered “good” migrants/ foreign citizens.

For example, the Chinese Exclusion Act did not allow the entrance and permanence and naturalization of Chinese for over 80 years in the USA (from 1882 to 1943). This policy not only may *still* shape the current understanding of Chinese Americans more generally but have influenced the ways in which this group integrated in society (Shin & Dovidio, 2018). Current misconceptions that Chinese migrants “do not intend to integrate” - that support some of Americans’ perspectives in relation to this group - do not account for the history of policies that were in fact hindering their rights and integration (Shimpi & Zerkel, 2012).

Overall, more attention is needed to these legal dynamics if a contextual perspective is truly sought. Particularly, laws and legal frameworks are not ‘perceived’. Laws participate in the power dynamics involved in the reification and stabilization of meanings that influence the relationship between host-societies and migrants (Andreouli & Howarth, 2013; Scuzzarello, 2012). Given our proposed emphasis on foreign residency laws we also adopt the term foreign resident – instead of migrant – to account for the different ways in which the mobile subject is being contemplated in the text of law and how it effects their everyday interactions and claims.

### 2.2.2. Contributions of the social psychology of citizenship to the study of migration

The recent literature of the *social psychology of citizenship* (Andreouli, 2019; Condor, 2011; Stevenson et al., 2015) offers theorisation to the context in which host societies and foreign residents interact (Andreouli & Howarth, 2013). Such an approach (1) considers the legal and institutional frameworks as *shaping* intergroup encounters with reified meanings (Andreouli & Dashtipour, 2014; Gray & Griffin, 2014); (2) looks at the co-constructed nature of meaning, as an everyday discursive struggle over who is considered the good citizen and under what conditions (Andreouli, 2019; Barnes et al., 2004; Condor, 2011) and the interaction of both (Andreouli & Howarth, 2013; Ellis & Bhatia, 2019; Scuzarello, 2012)

The rights of foreigners are subject to extensive and ongoing discussion and debate both in the theoretical and everyday domains (Bosniak, 2006; Joppke, 2007, 2021). For example, the article 13 of Declaration of Human Rights states that “everyone has the right to leave any country, including his own, and to return to his country” (UN, 2021). Individuals, then, do not have the *universal* right to cross borders and to reside in new countries. The task of defining to whom rights are granted, and in which conditions, are left to the management of borders by individual countries (Bosniak, 2000, 2006). These definitions result from struggles and ongoing debates to whom should it be given the *right to express* (mobility and residency) *rights* (Susen, 2010), and who is given the status of a foreign resident, and how (Bosniak, 2006, Soysal, 1994). Analysing citizenship from a social-psychological perspective, it is possible to explore the control mechanisms that are defining citizenship and shaping the relationship between host societies and foreign residents (Bloemraad, 2018). Additionally, it is also possible to explore how host-societies and foreign residents are advancing citizenship claims that are not legally contemplated (Isin, 2017).

Thus, the first contribution of the social psychology of citizenship to the study of migration and mobility relates to the traditional and common definition of citizenship. Citizenship is a state-centric mechanism defining a form of political and social membership (Bosniak, 2000; Marshall, 1950). Citizenship may be seen as a status that re-enforces who is deemed/not deemed worthy of entering/staying in a foreign country granting them rights and duties (Andreouli & Howarth, 2013; Figgou, 2016; Vink, 2017).

The bureaucratic apparatus then helps shape categories of foreign residents, by defining citizenship regimes (Vink, 2017). Particularly, drawing from those frameworks, the legal status of the “alien” or the ‘foreigner’ is understood, granting them rights, outside the skirts of

nationality (Bosniak, 2000, 2006; Soysal, 1994). These regimes inevitably have consequences for intergroup relations, for example, they can contribute to the ways in which migrants are seen as an asset or a drain for the country (e.g. regular vs. irregular status, Savas et al., 2021).

As stated by Scuzzarello (2012, p.4), “the state, through policies and laws, expresses and gives legitimacy to a range of narrative frameworks which have strong normative implications for how we conceive of a society, its citizens and the values that are honourable in it”. There is a process of legitimacy and recognition involved in the definition of laws that ‘manage’ foreign residency, making it important to analyse how meanings there contemplated are made sense of in everyday life.

For example, the refugee is a category that needs to be bureaucratically conferred so rights of permanence are granted, and support is provided (Mahendran et al., 2019). However, even though it is legally defined, it does not make it normative (Castro, 2012; Scuzzarello, 2012). These regimes are not unproblematically taken and accepted (e.g. individuals are willing to help asylum seekers when they arrive, may not be in favour of their long-term settlement, Thravalou et al., 2021). Refugees themselves, for instance, also try to contest the stigma associated with this category in everyday interactions (Mahendran et al., 2019).

The second contribution of the social psychology of citizenship to the study of migration and mobility is that it focusses on everyday struggles of meaning (Andreouli, 2019), or ‘battles of ideas’. For some authors, to look at citizenship as an ongoing, everyday, discursive struggle is to acknowledge that citizenship is not a status or a bundle of entitlements that “unproblematically flow from establishing oneself as a citizen” (Barnes et al., 2004, p. 184). This approach helps to contest any perspective that assumes that citizenship has one definite or static meaning/configuration that needs to be maintained (Susen, 2010).

In fact, most studies on the social psychology of citizenship have emphasized the discursive side of citizenship (Andreouli; 2019; Condor, 2011) as expressed in everyday meaning-making that is inherently political and consequential in how people relate with each other (Stevenson et al., 2015).

Often national identity plays a role in how citizenship is conceived in the everyday (Reijerse et al., 2015; Joppke, 2021), along with representations of history (Kadianaki et al., 2018). Meanings of citizenship can be based in ethic/cultural identities and definitions (Reijerse et al., 2015) or the group can be perceived based on civic and economic goals and priorities (Guerra et al., 2015; Langhout & Fernández, 2018). Thus, it is through the lens of citizenship that social psychology can engage with migration studies highlighting its politics: exploring how the

definitions of who (and how) someone has rights of residency are sustained and reproduced in everyday interactions and through institutions (Stevenson et al., 2015).

Furthermore, given contemporary global mobility, citizenship can be manifested in different locations, i.e., beyond the nation-state (Soysal, 1994) The ways in which meanings of place are articulated and mobilized are also an important aspect to the construction of citizenship and its boundaries. This is particularly relevant given the claim of the contemporary disarticulation between citizenship, the state and territory (Ong, 2006; Mitchel, 2016) - motivating some citizenship theorists to conceptualize denationalized/post-national forms of citizenship (Bosniak, 2000; Ong, 2006; Sassen, 2017; Soysal, 1994).

We then contend that the social-psychological study of citizenship should (1) emphasize the ways in which laws and institutions stabilize meanings of citizenship (Andreouli & Howarth, 2013; Castro & Santos, 2020); (2) consider citizenship as part of “the politics of everyday common-sense” (Andreouli, 2019, p. 7) and of meaning-making and (3) emphasize that struggles of citizenship are locational, emplaced, and not a dislocated phenomenon, and how meanings attributed to place are contributing to these struggles (Di Masso, 2012, 2015; Stevenson & Sagherian-Dickey, 2018).

Thus, this work supports that a social-psychological approach to citizenship should (4) work towards an integrative approach in which point (1), (2) and (3) are contemplated/acknowledged to put to the fore the tension between “agency and structure” (Giddens, 1979), that characterizes citizenship (Bloemraad, 2018), especially, in the current globalized world and of increasing mobility that contests the limits of place and space (Appadurai, 1996; Bosniak, 2000; Glick-Schiller & Salazar, 2013; Massey, 2005)

Indeed, some scholars consider that the current debate lies on whether citizenship is a status or a practice of membership (Isin, 2009). This current work argues, following Bloemraad (2018), that citizenship is both.

### **2.3. Social psychology of citizenship: an overview of the literature of domains and locations of citizenship**

Social psychology, albeit only very recently, has approached the study of citizenship in different ways (Andreouli, 2019). This section aims at presenting an overview some of its theoretical proposals and findings drawing from citizenship studies more generally (Bosniak, 2006; Bloemraad, 2018 Bloemraad & Sheares, 2017; Isin, 2017; Jopkke, 2007; 2019, 2021; Ong,

1999, 2006; Susen, 2010,). This integration provides a rich conceptualization of how macro-level factors (the reified sphere) such as institutions and laws affect the micro-level factors of everyday life (the consensual sphere) (Castro, 2012; Elcheroth, et al., 2011), and the *locations/limits* in which these struggles over citizenship, or ‘battles of ideas’ are played out (Bosniak, 2000).

In this section, then, we will make use of the social psychology’s theories and methods to explore citizenship as a multi-level phenomenon that is in constant debate and construction (Condor, 2011; Stevenson et al., 2015; Andreouli, 2019).

We will also make use of the proposals of TSR (Moscovici, 1988) and the tradition of “ideological dilemmas” from rhetorical psychology (Billig et al., 1988) to explore the meanings and struggles around citizenship. The similarities between the two approaches have been emphasized throughout the years, and at times, they are simultaneously applied and integrated (e.g., Castro & Santos, 2020). They both conceptualize the social as constitutive of the individual and focus on language and communication as the enablers of co-constructed meanings and realities (Batel & Castro, 2018; Gibson, 2015). Both aim to explore the creative and plural nature of citizenship to explore how legitimacy of *being* a citizen, as a subject of rights, is sought, reflecting the “discursive struggles over who has the power to institute meaning over others” (Andreouli, 2019, p.7).

The studies following the TSR tend to focus on the processes of change and stability of the meanings of citizenship as co-constructed and shared resources (Castro & Batel, 2008; Jovchelovitch & Priego-Hernandez, 2015). The study of “ideological dilemmas”, on the other hand, tend to focus on the themes and counter-themes that are put forward during interactions, as the argumentation processes unfold, exploring the flexible and strategic usage of meanings of citizenship as evoked in specific contexts (Gibson, 2011; Kadianaki et al., 2020).

This overview of the literature emphasizes the multiple arenas in which citizenship is made sense of in its multiple shapes and processes of construction. Thus, the first aspect in which citizenship stands is between the processes of stability and change (Batel & Castro, 2009), of conventional and transformative manifestations of citizenship (Andreouli, 2019), or of the reified and the consensual spheres (see Chapter 1). These studies include in their analyses of citizenship the macro-level – legal and institutional - contexts (Castro, 2012, 2019) and the micro-level interactions of the everyday in advancing specific citizenship claims (Anderson & Gibson, 2020; Andreouli, 2019; Condor, 2011; Di Masso, 2012; Haste, 2004; Stevenson et al., 2015 Xenitidou & Sapountzis, 2018).

The second aspect regards the location of citizenship, and the discursive practices that are constructing the limits in which citizenship can be found and practiced. This second dimension follows two important prepositions: (1) that citizenship, even though it is an “abstract” concept, has consequences to everyday spatial configurations (Di Masso, 2012; Stevenson & Sagherian-Dickey, 2018; Buhr, 2018; Zisakou & Figgou, 2021) and (2) that, particularly in case of migration, citizenship emphasizes the tension between national borders and more universal/cosmopolitan/post-national values and visions that helps guaranteeing that foreigners are the subject of rights (Bosniak, 2000; Xenitidou & Sapountzis, 2018). The following sections will present an overview of how the social psychological studies are positioned in relation to these dimensions and locations of citizenship, it does not aim to be an exhaustive review of the literature, but to guide and contextualize some of the key features of the framework followed in this dissertation.

### **2.3.1. Between the institutional and the everyday: conventional and transformative aspects of citizenship**

Social psychological studies of citizenship can focus on its dynamics of change and stability: of how institutionalised meanings and representations of citizenship are seeking to be hegemonic and coercive, usually, by enforcing the “one view”/simplified model of citizenship through institutional facts (Castro, 2015; Castro & Santos, 2020), in contrast with how it is changing and transforming, and the plurality that make these changes possible (Andreouli, 2019; Barnes et al. 2004). Studies can thus focus on either process, or integrate them, re-enforcing the interactive nature of both domains of ideological and social contexts in everyday micro-level interactions (Anderson & Gibson, 2020; Andreouli & Howarth, 2014; Kadianaki et al., 2017; Negura et al., 2020).

#### ***2.3.1.1. Citizenship as status: the institutional side***

Studies on citizenship can focus on reified, institutionalized aspects of citizenship of laws and institutions directly looking at policy documents that prescribe and regulate citizenship and the representations that are being put forward (Andreouli & Howarth, 2013; Gray & Griffin, 2014). By focussing on the reified aspects of citizenship these studies re-direct the attention to institutional facts and how they affect social psychological life (Castro, 2015; Sapountzis & Xenitidou, 2018), processes that often lack an integration in social psychology (Castro, 2012,



2015 but see Chapter 1 for an overview of how laws are integrated in everyday life). Particularly, these studies are an analysis of how “stability” is both sought and resisted (Batel & Castro, 2009; Negura, et al., 2020; Staerklé, 2015)

In their work, Gray and Griffin (2014) emphasized an institutional approach by analysing the mandatory test to acquire British nationality. Their findings emphasized the citizenship-as-identity view of the state, that needs to be learned and tested, meshing British identity into one homogenous representation and practice. The test and its reading materials fail to acknowledge the multiple sides and performances of British identity. Furthermore, this study also emphasizes the dilemmatic aspects of these institutional facts, by analysing how there are tensions, i.e., contradictory understandings in the reified realm of laws and institutions, such as, how citizenship is presented as an ongoing process, or as an *end* that can be tested (Gray & Griffin, 2014).

On a methodological note, this study analyses policy documents, just like Andreouli and Howarth’s (2013). These studies show social psychology’s potential to use texts of laws and other official documents as objects of inquiry – analysing and theorizing legal and institutional contexts instead of just acknowledging them (e.g. Esses et al., 2001, testing how laws are perceived).

Particularly, Andreouli and Howarth (2013) explore legal/institutional representations to contextualize the everyday representations of citizenship explored through focus group data. As stated by the authors, institutional facts can work as meaning resources, so migrants make sense of their identities, positions, and possibilities in the UK. The analysis of the two spheres of representations of citizenship showed an “earned citizenship” discourse that distinguishes between “wanted” and “unwanted” migrants, following the reified notions and practices that facilitate the “elite” skilled migrants’ entrance and residency, complicating the “non-elite” unqualified migrants’ entrance and residency. By focussing on the reified sphere, it is possible to explore the institutional values, representations and practices, and their consequences. It does not mean, however, that they are unproblematically incorporated in everyday life (Castro, 2012, 2015).

In fact, more often the institutional side is explored in the interaction of the reified and consensual spheres (Castro & Batel, 2008). They can contribute to and help shape the debate of what is deemed the *right* representations of citizenship. For example, studies have explored views of citizenship officers (Andreouli & Dashtipour, 2014) and the accounts by Scottish Muslims of their experiences with border security (Blackwood et al., 2015). These studies show the interrelated nature between the reified and the consensual spheres, i.e., how institutional

facts, even though they may not be widely-shared and supported by everyone (Castro, 2012, 2015), help shape discourse in how individuals and groups warrant their positions, particularly through the categories reified in laws, and strategically used in everyday interactions.

Andreouli and Dashtipour (2014) show how citizenship officers in the UK reflected an ambivalent construction of Britishness that could be inclusive in some contexts and exclusive in others, emphasizing the ambivalence between the deserving and underserving migrants, that the policy discussion had also alluded to (see Andreouli & Howarth, 2013). In this way, these officers understood that migrants should be welcomed if they demonstrated commitment and willingness to contribute to the British nation. Such a welcoming stance helped to construct the British nation as benevolent and hospitable. This contrasted with views of other “undeserving” migrants, that instead, positioned the British nation as a “victim” of exploitation by “opportunistic” migrants.

In a study analysing Scottish Muslim experiences in airports, Blackwood and colleagues (2015) show how borders and airport surveillance – institutions and institutional facts – are shaping meanings of citizenship. Airports are places where the issues of borders and nationality become more prominent. This study sheds light on the dynamics of recognition, and the difficulty of assuming identity categories as essentialized, by showing their context-dependent nature. In this case, Scottish Muslims did not see their British nationality recognized in full as they were often targeted for screening. Furthermore, this study also highlights how the Scottish Muslims meta-perceptions of the authorities may signal the perspective/positioning from wider society, having a detrimental role in the ways in which this group feel like they belong (Silka, 2018).

These studies show the need to look at institutions and spaces where citizenship is bureaucratically conferred and discursively enacted in helping shape everyday interactions. The institutional realm, as the result of collective priorities, prescribed in laws, tend to emphasize citizenship as national identity and national cohesion, creating criteria of inclusion that by default, excludes others. For example, other British identity configurations were not contemplated in the UK Citizenship Test (Gray & Griffin, 2014). In the next section we will focus on the concept of everyday citizenship in more detail, where meanings of citizenship are more plural.

### ***2.3.1.2 Citizenship as practice: everyday side of citizenship***

Views of citizenship are an integral part of “the politics of everyday common-sense” (Andreouli, 2019, p. 7). The study of everyday citizenship focusses on mundane acts of discourse and communication, from the perspective of citizens themselves (Andreouli, 2019). This perspective involved the analysis of how people make sense of and argue about the meanings of citizenship, and not necessarily how do they fit/not fit pre-established understandings of what citizenship is or should be (Barnes et al., 2004). Moreover, authors claim that this approach better understands the transformative aspects of citizenship because it relies on the analysis of the plurality and diversity of everyday thought (Andreouli, 2019) – i.e., the consensual sphere.

The study of everyday citizenship would require an analysis of discourse and social artifacts where ‘battles of ideas’ are prominent, these could be mediating systems (Castro & Batel, 2008) such as mass communication or social media (Carvalho, 2008; Kadianaki et al., 2016, 2020; Kadianaki & Andreouli, 2015) or acts of everyday interaction (Dixon et al., 2006; Gibson & Hamilton, 2011; Condor & Gibson, 2007). Most of these studies highlight the importance of analysing the terms in which – i.e., discursive repertoires, or social representations – citizenship is constructed, negotiated and contested.

For example, Castro and colleagues (2018) explored, as portrayed in the press by descriptive and opinion articles, the communicative and discursive practices of the rights-based arguments that were (successfully) contesting a law of fish/shellfish resource protection in Portugal. The analysis of interaction between the public and political spheres showed how the dissent voices were given space and were legitimized for their rights-claiming, inevitably leading to a change of the law.

Barnes and colleagues (2004) investigated the letters of complaint to the local council officials in relation to travellers that had settled in a land nearby. The membership category of “hard work tax-payer” to distinguish between “us”, the hard-working community, and “them”, the travellers that have no ties to place and institutions, to delegitimize their presence in the area. Another study analysing a corpus of letters to the editor of a newspaper in New Zealand, showed the argumentation processes that drew on the “primacy” of the law to delegitimize indigenous interests and protests. Simultaneously, it showed the rhetoric work in arguing for the rightfulness of such protests and demonstrations, emphasizing that laws may be flexible depending on different situations (Tuffin & Frewin, 2008).

There are studies that investigate the individual’s online presence and participation as everyday citizenship as well (e.g., Kadianaki & Andreouli, 2017; Kadianaki et al., 2018; Gibson, 2009; Gibson et al., 2018). Kadianaki and colleagues (2017, 2018) explored the

commentaries posted in the official ministry website when the Greek naturalization law had changed from an exclusive *jus sanguinius* approach to a *jus solis* one, that granted migrants the right to obtain Greek nationality. The analysis of the posted comments, both from migrants and Greeks, showed the construction of representations of citizenship either based on ethnic or civic representations to help put forward views of rights of naturalization that can be more inclusive or exclusive (Kadianaki & Andreouli, 2017).

Gibson (2009) by also analysing comments on an online forum about the British welfare system, identified the “effortfulness” repertoire and how it performs a variety of functions in discursive practice. Namely, this study highlights the rhetorical functions of individual psychology as reflected in governmental practices - individuals are expected to be responsible for not being “lazy” and need to show *effort* so to be eligible of welfare. This study was followed by others on the topic of effortfulness and welfare/social citizenship (Gibson, 2011; Anderson & Gibson, 2020), including in relation to migration (Gibson et al., 2018). At the heart of these constructions is social citizenship as being a right of citizens albeit in context in which paid employment is the most valued characteristic of citizenship (Lister, 2007). A study analysing the discursive repertoires that were sustaining the acceptance and rejection of Bulgarian and Romanian migration to the UK showed that this group could be seen as “too economic”, i.e., they could be understood to deprive UK nationals of jobs, or “insufficiently economic”, i.e., prone to exploit the welfare system (Gibson, et al., 2018, p.111).

These studies show the ways in which representations of citizenship are mobilized to include or exclude the Other. This analysis also highlights how pro-immigration arguments can often be anchored in views of citizenship that are still ‘Otherizing’ (Gibson et al., 2018; Andreouli & Dashtipour, 2014). By approaching citizenship as an everyday discursive practice allows to explore these meanings of citizenship as nuanced, complex and in context. These constructions are also not always consistently affecting particular positions and definitions of “us” and “them”. For example, conceptualizing membership as civic participation in the economy –in relation to some representations of citizenship here prescribed – contend that membership is constructed on the basis that a good citizen is law abiding with a paid employment (Lister, 2007). The division between “us” the honest hard-workers and “them” the opportunists or “welfare tourists” (Joppke, 2019) is managed in ways that can (or not) be inclusive of the Other.

### ***2.3.1.3 The institutional and the everyday***

Most authors concerned with the social psychology of citizenship agree that at the core of citizenship are the dynamics of stability and change/ the conventional and the transformative (Andreouli, 2019). These are usually brought by institutional facts in interaction with the plurality of the consensual sphere (Castro & Batel, 2008; Castro, 2020) or how “ideological dilemmas” are strategically used to put forward at times contradictory, but context specific positions (Billig et al., 1988). This analytic distinction alludes to tension felt by citizenship studies more broadly, that citizenship is not a matter of status or practice, but a matter of both those domains in interaction (Bloemraad, 2019), creating boundaries between “us” and “them” (Condor, 2011). The analysis of citizenship in these domains – the institutional and the everyday - provides the opportunity to explore their power dynamics (Negura et al., 2020) and to unveil the inequalities citizenship still poses to contemporary societies in their everyday understandings and practices (Ellis & Bhatia, 2019; Langhout & Fernandez, 2017).

The mentioned studies show that representations of citizenship across different contexts, such as the UK, Portugal and Greece, – be it nationality, social citizenship or the granting of rights – are not homogenous and are in transformation. At the heart of these dynamics are struggles over citizenship that are anchored in ideas of “deservingness”, “effort” or “exchange” that can work to include/legitimate or exclude/delegitimate citizenship rights of groups of people (Joppke, 2019). The construction citizenship by actors themselves, and in relation to the policies and legal framework at force, is the focus of the current project. However, social psychology could benefit from exploring how membership is constructed - without taking “national identity”, and its boundaries, for granted. This would require “looking at the political community [as] a matter for analytic attention” (Condor, 2006 cit. in Gibson & Hamilton, 2011, p.229) and to explore how their limits are being constructed and contested. This is a particularly urgent requirement considering views of citizenship within the “banality” of the nation-state (Billig, 1995) when globalization, as a movement promoting global economic relations and the exchange of goods, are re-writing some of these boundaries (Carolissen, 2012; Ong, 2006).

### **2.3.2. Between the nation-state, across the nation-states and in place: analysing the location of citizenship**

Social psychological literature has increasingly acknowledged the need to turn to place and space to explore social-psychological phenomena, including citizenship (Di Masso, 2012). This has led to thoughtful considerations into the places of everyday citizenship - particularly noticeable in how people occupy public spaces, as an “arena” of the social, that is imbued in

norms, organizations, and structures (Bettencourt et al., 2019; Di Masso, 2012, 2015; Dixon et al., 2006; Gray & Manning, 2014). More research has pointed to the need of “locating” the processes of migration and citizenship to avoid oversimplistic assumptions that they may regard the boundaries of the nation-state and national identities only (Zisakou & Figgou, 2021). Accordingly, research turned to study neighbourhoods, cities, and particular places that prompt different representations and discourses of citizenship to arise.

### ***2.3.2.1. Citizenship between and across nation-states***

Studies that analyse citizenship as a status, as belonging in a polity and regulated by institutional facts, more often consider the nation as the unit of analysis of citizenship (Sassen, 2017). The nation is the place where citizenship is assumed to be practiced and performed, with well acknowledged limits for inclusion and exclusion (Isin, 2017). This prompts a critical discussion on the “banality” of the nation (Billig, 1995) as the “obvious” unit of analysis of citizenship (Wimmer & Glick-Shiller, 2002). Work on international migration, and on the pressing issues that require global concerns, have emphasized the webs of connection that put at stake the role of the nation-state as the primary institutional framework in which citizenship can be made sense of (Carolissen, 2012; Leung & Chiu, 2014) - overlooking the processes involved in community-building and solidarity beyond nations (Bhatia, 2008; Wimmer & Glick-Shiller, 2002).

There are many perspectives that have highlighted the importance of looking at citizenship as an expression of community-making and interconnectivity across nation-states. These are post-national (Sassen, 2017; Soysal, 1994) denationalized (Bosniak, 2000;), de-territorialized (Appadurai, 1996), cosmopolitan (Calhoun, 2002) or transnational (Ong, 1999), proposals of citizenship. Although these concepts have traditions of their own, what they share is the lack of institutional facts regulating them. There are no supra-national institutions with power to reinforce these citizenship ideals and representations (Bosniak, 2000). Some state that the prominence of international human rights regime has strengthen post-national conceptions of citizenship (Sassen, 2017; Soysal, 1994). Environmental concerns – as a global issue – have also appealed to a more global understanding of membership and cooperation (Carolissen, 2012). However, even though there are increasingly more institutions at the supra-national level (e.g. UN, NGO’s, treaties, or the international court of justice) in order to become binding norms, they need to be nationally legislated (Castro, 2012; Sassen, 2017). Instead of assuming that citizenship is now “border-less”, the goal is to complicate the national and global binary

into constitutive dimensions (Di Masso et al., 2019). A closer attention is needed to the processes in which the national and the global are interrelated in configuring contemporary forms of citizenship (Carolissen, 2012).

This means that the study of citizenship should also focus on the “movement of people across space in relationship to forces that structure political economy” as *regimes of mobility* (Glick-Schiller & Salazar, 2013, p. 192). These regimes contemplate, but are not confined to, how states and policies shape increasing mobility and different memberships to form. One example of this interaction is of the possibility (or impossibility) of individuals to obtain multiple nationalities. Ong (1999) coined the term “flexible citizenship” to explain the processes in which multiple nationalities and passports are actively pursued, usually, for purposes of capital accumulation across the globe or in pursuit of better and different lifestyles (Studemeyer, 2015).

In some cases, the ways in which global market norms are helping articulate norms of citizenship are manifested in migration laws that favour the “talented foreigners”/ elite migrants (Ong, 2006) – or earned citizenship frameworks (Jopkke, 2007) facilitating the mobility of some, and not of others. The criteria, then, is guided by a view of the self-sufficient and successful individuals as the good citizens (Brown, 2016). Thus, they are given the right to broader mobility opportunities. Some authors claim that the present disarticulation of citizenship, state and territory, are the workings of the global market and neoliberal values constituting “universalizing criteria” sustaining citizenship (Ong, 1999, 2006).

Indeed, in social-psychological literature some scholars overly emphasize the advantages of globalization as a liberatory project, eventually fostering global solidarity and superordinate identities, but less attention has been given to how it is also a source of inequality and exploitation (Carolissen, 2012; Marsella, 2012; Prilleltensky, 2012).

As argued by Andreouli and Howarth (2019), these issues require an exploration of how (global) practices of citizenship are expressed in discursive practices, as everyday forms of citizenship and cultural repertoires. These authors, specifically, explored everyday cosmopolitanism from a lived perspective (Billig et al., 1988). Their findings show how cosmopolitanism is constructed as a “project of global capitalism that only speaks to the lifestyles and interests of transnational elites” (p. 294), similarly to Calhoun’s (2002) reflection of the inherent inequalities brought by cosmopolitanism as a discursive device. There is a naturalization that increasing mobility is an asset of the elite traveller, legitimizing such cosmopolitan forms of citizenship. But, as Massey (1991) argues, the increasing mobility stems from the unequal distribution of mobility opportunities - of who has access to mobility and of

such cosmopolitan/transnational forms of citizenship. Thus, this control over mobility by some “entrenches the spatial imprisonment of other groups” (p.26).

### **2.3.2.2. *Citizenship in place***

Some authors argue that the analysis of local forms of citizenship better explores the contemporary tension between national and global configurations and memberships and their associated inequalities (Bosniak, 2000; Sassen, 2017). In increasingly more globalized societies, it is in the city that multiculturalism and cosmopolitanism are made visible in societal organization and structure (Zisakou & Figgou, 2021). A local and place-based approach to the global understands that increasing mobility have not left local communities ‘untouched’ (Risbeth & Powell, 2013; Main & Sandoval, 2015).

Indeed, mobility and immobility are not independent phenomena (Carolissen, 2012; Cresswell, 2010; Di Masso et al., 2019, Gustafsson, 2001). This interdependence is more evident in the case of migrants that make use of spaces to create “Muslim quarters”, “Little Italy”, “Little Portugal” or “Chinatowns” all over the cities of the world (Appadurai, 1996; Erkhamp, 2006). They occupy and manipulate these public spaces to foster a sense of continuity with their locals of origin (Main & Sandoval, 2015).

What is less discussed in social psychological literature is how global markets are shaping urban landscapes and citizenship claims *in* and *about* place (Di Masso, et al., 2019). And how, in turn, these forces are contributing to life in neighbourhoods and in public spaces (Bettencourt et al., 2019; Stevenson & Sagherian-Dickey, 2018;) or to the mobility paths pursued inside and outside the city (Ropert & Di Masso, 2021). These dynamics result from an understanding of place that is not physically bounded or isolated (Devine-Wright, 2013; Rishbeth & Powell, 2013) but are, *de facto*, part of global exchange (e.g., “global sense of place” in Kilburn High Road, London, Massey, 1991).

Traditionally, the meanings attributed to citizenship *in place* often focusses on territoriality. The study of locational citizenship relates to the rights to be in place and to be recognized as a citizen (Di Masso, 2012, 2015). Barnes and colleagues (2004) showed how locational aspects (such as long-term residency and paying taxes in the local parish) were used to oppose the presence of travellers in the area. In the literature of place-attachments specifically, the overall assumption is that presence, permanence, and stability in place are the basis for (seen as legitimate) citizenship claims (Di Masso et al., 2019; Castro, et al. 2018; Devine-Wright, 2013)



Yet, mobility is allowing for different place-claims to be possible. One example is of lifestyle consumption or “emigrating without settling” trends that opened other possibilities (Liu-Farrer, 2016). For instance, in the Algarve, Portugal, new forms of mobility are “consumption-led and tourism-related” that nevertheless are associated with the purchase of real estate property by British migrants (Torkinton, 2012). As they are leading highly mobile practices, it bears the question how the purchase of property can contribute to a sense of belonging and entitlement and how, in turn, citizenship is constructed in such circumstances - when their physical presence is often temporary and transient (ibid.).

This configuration of new possibilities to be *in place* is an example of the influence of global market dynamics – often fostered by national policies - in influencing citizenship dynamics in practice (Glick-Schiller & Salazar, 2013).

The approach of locational citizenship should enquire how these global-local dynamics are being materialized in local realities (Zisakou & Figgou, 2021). There still lacks a focus on how configurations of mobile citizenship contribute to and result from the intervention of the global market in defining different rights to place and mobility. Not all foreigners have the same rights to be in place – to enter national borders and to become residents. Indeed, economic migrants are given more barriers than “elite” migrants (Ong, 2006; Ellis & Bhatia, 2019). “Elites” are given privileged positions and identities to manoeuvre and accommodate mobility inside representations of citizenship with a different ease (Torkinton, 2012).

Thus, how foreigners can claim their (im)mobilities is part of citizenship struggles that are both national, global and *in place*. The inequalities associated with mobility – and how national policies are enabling them – are pressing issues for the social psychology of citizenship. It is thus necessary to explore how citizenship is an expression of membership across nations as an everyday practice, shedding light on the inherent mobility inequalities associated to it. The truth is that cosmopolitanism/ a type of “across borders” citizenship is still needed (e.g. guided by human rights) although its configuration is still unclear (Bosniak, 2000; Calhoun, 2002). In the meanwhile, citizenship and migration studies should focus on how citizenship rights-claiming “beyond nation states” and “in place” are being made.

## 2.4. Concluding remarks

This chapter aims at presenting a social-psychological framework for the study of citizenship that incorporates its different domains (the reified/ institutional and the everyday) and provides a special concern into its locations (national, global, local).

An overview of the social psychology of citizenship shows how to analyse the ongoing struggles over meanings of citizenship (Andreouli, 2019). These can either emphasize the institutional or everyday sides of citizenship – helping define who should be considered the citizen and who is seen to be able to claim rights. Their interrelated nature produces tensions either towards homogeneity and control or, contrarily, promoting plurality and transformation (Negura, et al., 2020). These forces are at odds with each other in diverse contexts.

Institutions – part of the reified sphere – promote a view of citizenship that is well-established and defined, based on collective agreements (Castro, 2019). The everyday – the consensual realm of social representations – is where citizenship disputes are more visible, where citizens themselves contribute to these meanings with rights-claiming (Bloemraad, 2018). The overall studies on these meanings of citizenship emphasize “effort” and “deservingness” in crossing national borders and naturalization (Andreouli & Dashtipour, 2014) or in the entitlement of social welfare provisions (Gibson, 2009; Gibson et al., 2018).

Citizenship involves meanings related to “who” is the citizen and includes debates as to “where” do citizens enjoy their rights. This is a consequence of increasingly universal understandings of citizenship (motivated by human rights) (Soysal, 1994) *and* is also shaped by the flows of the global market and increasing mobility (Glick-Shiller & Salazar, 2013; Mavelli, 2018). Consequently, citizenship has this hybrid capacity of being simultaneously territorial – because of laws and regulations that delimit citizenship in place (Bosniak, 2000) - and its de-territorial configurations brought by human rights regimes, global markets and neoliberalism, decoupling citizenship from any place-related dynamics (Ong, 2006). This capacity then challenges the study of citizenship as expressed *in relation to* and *in place*, where these tensions between the local/territorial and the global (deterritorial) become more prominent (Zisakou & Figgou, 2021)

Neoliberalism, as a political rationality, is seen to legitimize some of these dynamics of citizenship (Ong, 2006). This is particularly true to the ways in which the local and global dichotomies are expressed and made sense of and articulated (Mitchel, 2016; Zisakou & Figgou, 2021). It then bares the question how neoliberalism is helping to shape some of the

contemporary citizenship struggles. Particularly, how it is being incorporated in everyday society and through which discursive mechanisms. This is the topic of the next chapter.



## **Neoliberalism and the consequences for the study of social representations of citizenship**

### **3.1. Chapter presentation**

In this chapter we will explore how neoliberalism affects the study of social representations of citizenship. Neoliberalism is here conceptualized as encompassing more than a political economy, but a mode of state-crafting and a political rationality that shape everyday meaning-making. One identified mechanism to help normalize neoliberal understandings and values is the strategy of depoliticisation. Originally, depoliticisation was conceptualized as a mode of state crafting by politicians that hides or makes less visible the “political” and the “argumentative” side of politics (Wood & Flinders, 2014). More recent reflections have proposed that depoliticisation can also influence other domains of life, including in everyday discursive practices by advancing the one and only rational choice in everyday affairs. We will include a reflection of the consequences of depoliticisation in advancing neoliberalism as the one and only development, including the globalizing trends as inevitable forms of progress and development (Massey, 2005). First, we will explain how TSR (Moscovici, 1961/1976, 1988) can contribute to a better understanding of depoliticisation through the analysis of discourse and communication in different societal domains. These would be representational and discursive mechanisms that hide from sight other alternatives, like hegemonic social representations. Second, we will explore the consequences of these meaning-making processes to the study of citizenship. We will also include some considerations of how neoliberalism is advancing neoliberal citizenship in ways that hides other citizenship alternatives.

### **3.2. Introduction: Neoliberalism and depoliticisation from state-crafting to a discursive practice**

Neoliberalism and the neoliberal state favour “strong individual private property rights, the rule of law and the institutions of freely functioning markets and free trade” (Harvey, 2005 p. 64). In order to guarantee these priorities, the state needs individuals, their relations and their shared meaning-systems to be aligned with the goals of the free market (Wacquant, 2012). Thus, more than a political economy fostering a free global market, neoliberalism is affecting contemporary societies as a political rationality (Brown, 2015; Ong, 2007) and shaping people’s beliefs and collective representations (Bay-Cheng, et al., 2015; Wacquant, 2012; McDonald, et al., 2017) and, ultimately, the construction of citizenship in the everyday (Brown, 2016; Ong, 2006; Wacquant, 2012).

To reach this (neoliberal) end it is necessary to produce a type of depoliticised subject. It is not a matter of exploring “how our conduct is conducted, but to capture which rationality shapes the order of truth that allow these (neoliberal) practices to function at all” (Cornelissen, 2018 , p.135). Depoliticisation is a way of shaping such truth, i.e., through the concealment of the political and ideological choices involved in governance and everyday meaning-making. (Brown, 2015).

Since the fall of the Berlin Wall and giving way to third-way centre politics (Maesele, 2015), the “post-political” zeitgeist is seen to be responsible for “the common-sense claim that there is no (ideological) alternative (to neoliberal globalization and the liberal-capitalist order)” (Maesele, & Raeijmaekers 2020, p.1595). Thus, the study of how neoliberal rationality influences the “thinking society” (Jovchelovitch, 2008) has mainly explored the strategies of depoliticisation, i.e., how the classic right and left ideological struggles, has been substituted instead with dichotomies between what is *right* and *wrong*, in moral terms (Mouffe, 2006)

Originally depoliticisation was conceptualized as a mode of state crafting (Wood, 2016), focussing on how political decisions become a matter of technical expertise that requires other agents (not politicians) to dilute the accountability of decisions in putting forward the neoliberal agenda (Hay, 2014). More recently this area of studies has adopted a broader understanding, where depoliticisation is defined as the set of processes through which the debate about political options is closed down, and alternatives are hidden from view in different arenas of social life (Maesele & Raeijmaekers, 2020; Wood & Flinders, 2014). Usually, these processes – including for instance the presentations of public policies as natural and inevitable, as “good”

governance instead of the expression of ideological preferences - has helped to spread and establish the “invisible hand” of neoliberalism (Bettache & Chiu, 2019).

The consequences of depoliticisation can be the hindering of citizens’ involvement in debates, narrowing down possible alternatives and helping to consolidate the hegemony of the neoliberal project (Hay, 2014). Wood and Flinders (2014) propose three levels where depoliticisation can be analysed, specifically: (1) the governmental (the traditional approach to depoliticisation), through the study of governance and politician’s decision making, (2) the societal, where public concerns are shaped into individual decisions and behaviours during the politicians’ interaction with citizens and (3) the discursive, performed by anyone, in everyday interactions.

In its governmental form, depoliticisation is noticeable in how political decision-making involves thirds parties, to guarantee that a technical decision is made; in how irrefutable limits are put down, for instance, through monetary policy constraints by international agencies (Moury & Standring, 2017), or in the diluting of political responsibility by involving “too many hands” to handle a particular issue. In this approach to depoliticisation, the main focus is on how the accountability of an outcome is managed and kept at bay (Wood & Finders, 2014).

At the societal level, the analysis is focused on the mechanisms of public communication and interaction. Particularly, it focusses on the inevitable hindering of participatory citizenship when political choices are presented as inevitable and with no alternatives possible (Wood & Finders, 2014). This is the case of how the press portrays, for instance, climate change mitigation policies. Discourses assume a technocratic, managerial solution for it, making it seem that there is only *one* inevitable strategy, i.e., that there are no other alternatives than capitalist strategies to tackle climate change (Maesele & Raeijmaekers, 2020). This depoliticisation is also reflected when political issues are suggested to be solved through individual behaviours, like when governments take an issue of public concern to the micro-cosmos of individuality and erasing its collective/social nature (Wood & Flinders, 2014).

For example, taking as an example the discipline of social psychology, the attempt to investigate psycho-social phenomena through individual approaches only, – without accounting for the political, deliberative and argumentative side of these processes – could be seen as depoliticisation as well (Elcheroth et al., 2011, Howarth, et al., 2014; McDonald, et al., 2017).

Lastly, the discursive side of depoliticisation could be understood as the cultural/representational form of neoliberal rationality (Brown, 2016; Cornelissen, 2018). In this sense, neoliberalism is a cultural resource that naturalises or normalises neoliberal values as technological choices and it puts them in a moral good/bad dichotomy, erasing the possibility

of contestation (Mouffe, 2006). This strategy integrates the rules of the market and of the economy in everyday discourse and concepts (Chun, 2017), and becomes part of common-sense (Hall & O’Shea, 2016).

By “economizing” everyday thought, the “rules of the market” are then seen as “rational”, “natural” or inevitable (Andreouli & Nicholson, 2018; Brown, 2015; Mouffe, 2005; Ong, 2007). The economy and monetary solutions become associated with reason, and rational thinking. Other matters, such as citizenship, are biased or flawed, because they are inherently political and are discussed as such (Andreouli & Nicholson, 2018) – although there can be processes that re-signify the meanings of citizenship as technological decisions as well (Santos, et al., 2020). Thus, when emphasizing the rationality of the market, it is appealing to the technology of neoliberalism as hegemonic and taken for granted (Hall & O’Shea, 2013; Harvey, 2005; Plehwe, 2016). It assumes “a *de-politicized* technocratic management of social, economic and ecological matters within the framework of an *inevitable* hegemonic neoliberal project and market forces” (Maesele, 2015, p. 430).

Research also highlighted depoliticisation in the reconfiguration of political conflicts, such as Brexit, into the rationality of the market and of economics to defend a strong position for Remainers (Andreouli & Nicholson, 2018). Other research has also explored how citizenship was portrayed in public speeches in the UK during the first months of the COVID-19 pandemic, emphasizing the individual responsibility to tackle the crisis and appealing to the “sacrificial” citizen (Andreouli & Brice, 2020; Brown, 2015). Other research focusses on the extent to which public discourses about the environment – and the mitigating measures to tackle climate change – are impeding (through depoliticisation) or facilitating (through plurality of voices and perspectives) democratic debate and citizenship regarding these issues (Maesele, 2015).

Some scholars pursue a particular focus on the globalizing forms of neoliberalism – particularly in helping legitimize increasing mobility related to global flows of capital (Ong, 2006; Massey, 2006; Mitchel, 2016). The interwoven understanding of liberal democracies and neoliberalism helps to assume that it is a project “for all” and for the whole world (Mitchel, 2016). That is why so often time and space are compressed into one dimension - and is expected to bring a universal political rationality with it (Harvey, 2005; Massey, 2006). This, however, leaves other forms of development and views of the world undiscussed.



### **3.2.1. Consequences for the study of social representations and discourse**

In social psychology, some research has been conducted to explore the extent to which individuals endorse neoliberal values – and measures were created for the purpose (Bay-Cheng et al., 2015). Research has focused on neoliberalism as shaping knowledge in the marketisation of higher education institutes (Gjorgjioska & Tomicic, 2019), others have debunked the characteristics of such neoliberal marketisation in interpersonal trust (Zhang & Xin, 2019).

Instead of assuming neoliberalism as an ideology (Bettache & Chiu, 2019), this work proposes that TSR is best suited to explore how neoliberalism shapes meaning. A meaning-making perspective is best aligned with the approaches that highlight depoliticisation as the process in which neoliberalism is part of common-sense (Hall & O’Shea, 2013).

This would require a focus of depoliticisation as content, e.g., the incorporation of the rules of the (global) market as inevitable and rational in everyday meaning-making, and, we would add, as format (Batel & Castro, 2018). The discourse of depoliticisation uses strategies to close down the debate that would help articulate other (neoliberal) alternatives. From a meaning-making perspective, neoliberalism poses a challenge as a topic of enquiry because its political logics are never fully disclosed as such. Neoliberalism has concealed the fact that some aspects of the social order results from choices, struggles and power relations (Maesele & Raeijmaekers, 2020).

Drawing from the depoliticisation framework, TSR should orient towards the study of diffusion, a communicative modality that assumes a general/universal audience and mobilizes taken-for-granted widespread concepts/meanings. Accordingly, it should also explore the logics of hegemonic social representations and how they antagonize other alternatives.

#### ***3.2.1.1. Diffusion as a form of depoliticisation***

Communication modalities are found in mediated forms of communication that present issues to the public sphere, such as in the press and other forms of media (Castro et al., 2018). In fact, mediated forms of communication have contributed to the logics of depoliticisation (Maesele & Raeijmaekers, 2020). This is done by not disclosing the contribution of the neoliberal values to everyday ‘battles of ideas’ (Mouffe, 2006). Not asserting neoliberal values as sustaining a particular economic *and* political configuration naturalises or normalises them, usually, as technological choices. In particular, the works of the economy are often presented in the press as if it was a hard science (even though this is contested in the discipline - Deakin et al., 2017),

and their recommendations and logics are taken as inevitable facts of social life - difficult to be contested (Mouffe, 2006).

These are strategies that resort to reification and other discursive strategies that antagonize the perspective of the Other (Batel & Castro, 2009; Castro & Santos, 2020; Gillespie, 2008, 2020a), without, however, constructing the “Other” that is being antagonized. By erasing the possibility of alternatives, and of voices of contestation (Gillespie, 2008; Santos et al., 2020), it affects citizens’ involvement in the debate and helps to consolidate the hegemony of the neoliberal project (Hay, 2014).

Exploring the logics of diffusion is to explore the mechanisms that make particular configurations to be “natural” and coercive (Staerklé, 2015). When laws carrying neoliberal values are presented to the public, for instance, more often the political struggles that contributed to the creation of these policies are hidden and left undiscussed (Boager & Castro, 2021; Maesele & Ræijmaekers, 2020; Santos, et al., 2020). The attempt, particularly of mainstream media, is to speak to an “universal audience”. The dynamics of neoliberal common-sense thus requires an analysis of the discursive practices that may be responsible for hindering democratic practices brought by political sides and tensions (Mouffe, 2006) – by emphasizing common - taken for granted - representations.

Yet, on the other side of this unaffected communication modality, there is propaganda, taking a clearly and overtly antagonistic form and usually contesting the status quo, like the one performed by alternative media (Maesele & Ræijmaekers, 2020).

### ***3.2.1.2. Neoliberal rationality as hegemonic social representations***

As stated by Harvey (2006, p.3) “neoliberalism has, in short, become hegemonic as a mode of discourse (...) [it] became incorporated into the common-sense way many of us interpret, live in, and understand the world”. Other scholars consider the hegemony of neoliberalism to resonate Gramsci’s notion of political consensus (Plehwel, 2016). We propose a broader understanding of this hegemony that not only regards the reified sphere of laws and institutions, in its modes of governance and state-crafting, but as extended in meaning-making practices of the everyday (Castro & Mouro, 2016).

In the social representations’ tradition, the hegemony of neoliberalism should be understood within the logics of hegemonic social representations (Moscovici, 1988; Boager & Castro, 2020; Castro & Mouro, 2016). The analytic focus should then be on what is taken for granted, and what debates and assumptions this sort of communication is hindering. Hegemonic

social representations are those ideas that even when they are not re-enforced in society, they “keep returning even when there are efforts to change them” (Castro & Mouro, 2016, p. 862). They can even remain undiscussed, falling into collective amnesia their origins and transformations (Marková, 2003).

This does not mean that neoliberalism’s ideas and values are “natural” and unproblematic on their own. It means that neoliberalism as a political rationality has been constructed on the basis of values and representations that leave neoliberalism undiscussed – hindering alternative representations. Following the example of Hall and O’Shea (2013) using a speech by Margaret Thatcher, when she alludes to “fairness” to delegitimize any welfare provisions to the ones who have not produced “national wealth”, she makes common-sense assumptions, available to all, put forward a favourable view of the neoliberal state.

This does not mean that the neoliberal rationality, as hegemonic social representations, is a fully cohesive set of beliefs, values and practices. The works of Billig and colleagues (1988) on everyday meaning, highlights how even hegemonic social representations in practice have dilemmatic and contradictory components. For example, a study exploring “post-political”/depoliticised orientations of current politics, showed a tension between third way politics aiming to find centrist and “fair” political solutions being articulated within the boundaries of political parties - but that make ideological “us/them” configurations still possible (Weltman & Billig, 2001). Or, for example, China seems to incorporate an authoritarian and strong view of the state, simultaneously participating in the logics of the neoliberal global market (Brown, 2015, 2016; Ong, 2007). These are examples on the difficulties of pinpointing neoliberalism as a cohesive and well-defined set of practices and discourses.

What is worth exploring, from a social presentations point of view are then the ways in which neoliberal policies and values are presented as a taken for granted. This is a common-sensical discourse that often uses reification - an argumentative modality that does not accommodate the perspective of the Other (Batel & Castro, 2009) – in helping make the neoliberal project wide-spread (Boager & Castro, 2021). This does not mean that alternative representations do not exist – particularly in the format of polemic social representations, to contest hegemonic practices and assumptions - but that alternatives, and even resistance, need to work out discursive strategies that can overcome neoliberalism’s’ “taken for granted” assumptions. Neoliberalism as hegemonic social representations are not impossible to contest, but the resistance to such proposals need to work out the “naturalness” in which neoliberal values are being disseminated.

### 3.2.2. Consequences for the social-psychological study of neoliberal citizenship and mobility

In this section, the focus is not so much on the “how”, i.e., the discursive strategies pursued by a neoliberal rationality informed by depoliticisation, but on the “what”. Neoliberalism is seen as “an articulation of state, market and citizenship that harnesses the first to impose the stamp of the second onto the third” (Wacquant, 2012, p. 71). In this way, the logics of the national and global markets, i.e., the context of global capitalism of increasing mobility and global interaction, citizenship norms and practices are understood to be “mutating” (Carolissen, 2012; Massey, 1991, 2006; Ong, 2006). State crafting/institutional mechanisms are being put into force to put forward complex citizenship configurations that regard not only the relationship with the nation-state but with the increasing flows of capital, goods and of people (Carolissen, 2012). These transformations, then, need to be incorporated in discursive practices in everyday life (Wacquant, 2012). For example, borders are serving as selection mechanisms following the needs of the global market (Mavelli, 2018): allowing a specific type of person to apply for citizenship regimes that are granted easier conditions for residency and mobility (Ong, 2006; Mitchel, 2016).

*Homo Oeconomicus* is the term used by Wendy Brown (2015) to describe how neoliberalism is shaping representations of citizenship. It opposes to *Homo Politicus* as a political and argumentative subject. Citizenship is then economized according to a portfolio of skills, investments, and debts that are deemed relevant for the polity (Brown, 2015; Ong, 2006). More often the contribution of a citizen is weighed according to the capacity of producing (national) economic value – disregarding any other type of work that may not be paid. This is the case, for instance of housework and family care, usually pursued by women, that do not see any ‘neoliberal’ validation (Langhout & Fernández, 2018; Lister, 2007). Some authors also contend that these constructions of citizenship emphasize the individual’s capacity for self-management (Andreouli & Brice, 2020; Anderson & Gibson, 2020; Brown, 2016; Langhout & Fernández, 2018).

Another characteristic of this neoliberal view of citizenship is that it serves both local and global dynamics (Mitchel, 2016; Ong, 2006). Mobility of people with capital contributes to the competitive markets as spread across borders. Citizenship becomes a bundle of values, representations and technologies that are following the logics of global markets in shaping who is the *good* citizen (Ong, 2007) but it is not disconnected from the policies at the level of the nation-state. What we witness is an increasing instrumental approach to citizenship – fuelled

by legal individualism - that instead of promoting community building, passports and foreign residency, these are strategically and individually to enable the individual participation in the dynamics of the global markets (Joppke, 2019).

However, this instrumentalization is a trend not accessible to all (Ellis & Bhatia, 2019; Joppke, 2019). Foreign residency policies in European countries make a very clear distinction between who has access to residency and mobility rights, and for what aims. For example, some European countries (e.g. the Netherlands, Germany) require civic tests prior to migrants' entrance (Joppke, 2007) – i.e., they are required to know the language prior their entrance – that automatically stratifies foreign residents in terms of their skills. Thus, national and European policies work to attract skilled and qualified migrants to enter and reside more easily *and* create barriers to non-skilled migrants or the “regular” economic migrant (Mavelli, 2018). Neoliberal citizenship, in this sense, “is thus paradoxically about both the capacity to be mobile and free-floating and the ability to form and inhabit the enclave”, that is, ‘the European fortress’ (Mitchel, 2016, p. 125).

A paradigmatic example of such trends is the recently implemented citizenship-by-investment and residency-by-investment programmes in different European countries (Suskia, 2020; Tanasoca, 2016 see Chapter 4) during times in which tens of thousands of migrants died in the Mediterranean Sea (Mavelli, 2018). Scholars identified it as a neoliberal policy that is responding to neoliberalism as a political rationality (Ampudia de Haro & Gaspar, 2019)

Thus, neoliberal understandings of citizenship tend to “unproblematically” assume a distinction between the skilled foreign resident as more “worthy” than the unskilled one (Mitchel, 2016). Consequently, such construction instigates the discipline of social psychology to explore *how* are the “worthy and unworthy” migrant categories associated with economic capacity (Andreouli & Howarth, 2013; Ellis & Bhatia, 2019) being made sense of and affecting social representations of citizenship.

### **3.3. Concluding remarks**

In this chapter we explored the ways in which neoliberalism, as a political rationality (Brown, 2015) that follows certain discursive formats of depoliticisation (Mouffe, 2006; Wood & Flinders, 2014), is helping shape the meanings of citizenship.

Because of its fluidity of expression across the globe and in theoretical domains, there lacks a precise definition of neoliberalism (Springer et al., 2016). Yet, there are certain mechanisms

that the literature has identified. Depoliticised discourse is one characteristic, in which, dichotomous views of the world are presented, closing down any political debate. In this way, neoliberalism is supporting technocratic perspectives of the world, not allowing collective debate about certain issues by presenting decisions as a matter of morality (Mouffe, 2006). This is noticeable at the level of state-crafting and institutions that look for technocratic solutions for social issues, but also in everyday interactions and discourses (Wood & Flinders, 2014).

In relation to the study to social representations, we argue that neoliberal rationality may be accompanying the logics of diffusion as a communicative modality, because it is the one that better supports hegemonic social representations. We here argue that the invisibility of the genesis of such representations, where the global market plays a central role in national and everyday decision-making, is the reflection of such dynamics.

In terms of content, into how citizenship may be ‘mutating’ in response to neoliberal proposals and values, literature has shown that it is being constructed in relation to the educated subject because it carries the neoliberal tropes and capacities to obtain success. The *good* citizen, individually and wilfully, has the capacity to not become a “burden” to society. The *Homo Oeconomicus* is thus valued in terms of the capacity for (neoliberal) production and contribution. Another characteristic is the availability of pursuing mobility and participating in the dynamics of the global market (Ong, 2006). Neoliberal citizenship can be enjoyed across borders but are reserved to the educated/wealthy subjects that can enjoy this possibility.

The ways in which neoliberal rationality are influencing meanings of citizenship is even more relevant when new laws and policies make this configuration more obvious. This is the case of the residency-by-investment scheme that commodifies citizenship and offers broader mobility possibilities than other regimes for foreign residency (Ampudia de Haro & Gaspar, 2019).

This is a law that regulates citizenship in ways that seem to reinforce the neoliberal agenda and it is the object of interest of this dissertation. The next Chapter will explore the issues of such a neoliberal law in more detail, and the consequences for Chinese mobility, the most affected group by this policy in the Portuguese context.

## **“Citizenship for sale”: Portuguese foreign residency laws attracting Chinese mobilities**

### **4.1. Chapter introduction**

This chapter presents the context of this research. We will present a short overview of the Portuguese foreign residency laws with a special emphasis on the implementation of the residency-by-investment programme in 2012. This is a neoliberal legal innovation that has re-defined the requirements for foreigners to entry in the country. Instead of valuing long-term permanence and participation in the labour market, this new law exempts foreigners from long-term permanence in exchange of investment. A detail description of this programme is offered and some consideration to its consequences to citizenship (Shachar, 2017). We will explain how this alteration has contributed to a new Chinese mobility in the country and contextualize it in the history of Chinese mobility to Portugal and more broadly, in the world (Amante & Rodrigues, 2020; Liu-Farrer, 2016; Gaspar, 2017). Particularly, we will explore this groups' role in putting forward new ways of enjoying citizenship and claiming mobility rights, not only in Portugal, but around the globe (Ong, 1999).

## **4.2. Introduction: The foreign residency laws in Portugal and the legal innovation of residency-by-investment scheme**

The current Portuguese foreign residency framework was implemented in 2007 (*Law 23/2007 July 4<sup>th</sup>*). It was at the time described by the legislators as “realistic and balanced” wanting to accompany the transformations of contemporary mobility (SEF, 2013). A comprehensive analysis of these policies ranks Portugal favourably in general terms, according to the Migration Integration Policy Index, a tool that measures how migration policies are working towards the integration of migrants across 52 countries (MIPEX, 2021).

The most noteworthy of the alternations to the 2007 law has been the implementation, in 2012, of a residence permit in exchange of economic investment - Residency Permit for Investment Activities (SEF, 2013) -, popularly called *golden visa* in the Portuguese public sphere (Ampudia de Haro & Gaspar, 2019). This is a path for residency never contemplated in the Portuguese context, but not exclusive to Portugal. Similar regulations were implemented throughout Europe around the same time, like in Latvia (2010), Bulgaria (2012), Hungary (2012), Malta (2013), Greece (2013) and Spain (2013), granting residency rights in exchange of investment (Parker, 2017). Criticisms to this type of programme have been mainly drawn by the idea of “selling citizenship” (Shachar, 2017), by applying the logics of the market to regulate it – an area that was (at least formally) market free (Harvey, 2005). In the Portuguese context, it contributed to the creation of “a new category of people in the Portuguese borders and migration’s lexicon: the investor” (Amante & Rodrigues, 2020, p.7), putting at stake the initial proposal of “balance” within the residence regimes in regulation.

This was a measure put in place by a center-right government when the country was under the Troika (EU and IMF) intervention (2011-2014) and its austerity measures, in the sequence of the crisis that hit Portugal in the wake of the 2008 financial crash. The bail-out programme led to economic restrictions that were made for the sake of keeping the country afloat (Moury & Standing, 2017). At the time, the residency-by-investment programme was understood and presented as a mechanism for captivating wealthy individuals to the country, with the capacity of boosting the economy: an inevitability for challenging times (Amante & Rodrigues, 2020). Thus, it can be considered a neoliberal mechanism of border selection in protecting the neoliberal state (Mavelli, 2018; Wacquant, 2012.). An example of how policy choices are guided by the logics of the global market to articulate neoliberal norms and representations of citizenship (Ong, 2006).



Specifically, the Portuguese programme is considered to have low to medium obligations and to offer a good bundle of rights (Parker, 2017), most of them exclusive to this programme compared to other foreign residency programmes. In Portugal, from its implementation in 2012 until August 2021 there has been, in total, 9939 primary investment-beneficiaries and 16941 requesting family reunification (SEF, 2021 and see Table 4.1 for more detailed data). The investment options are (Gaspar & Ampudia de Haro, 2019, and according to SEF, 2021a):

- (1) Capital transfer of at least 1 million euros (soon to be updated to 1.5 million in the upcoming year of 2022);
- (2) Creation of at least 10 job contracts;
- (3) Purchase of real estate worth at least 500.000 euros (in the beginning of 2022 these should be only in areas of low population density, excluding the greater metropolitan areas of Lisbon and Porto)
- (4) Purchase of real estate property with a construction date dating back 30 years, located in areas of urban rehabilitation and guaranteeing renovation works of the purchased property in the total value of at least 350.000 euros;
- (5) Capital transfer of 250.000 euros in an investment that supports artistic production and maintenance of cultural and national heritage in diverse public institutions/foundations, or intermunicipal associations;
- (6) Capital transfer of at least 350.000 thousand euros (soon to be updated to 500.000 euros in the upcoming year of 2022) in risk investment for the capitalization of companies in functioning for 5 years where at least 60% of the investment should implicate head offices in the national territory;
- (7) Capital transfer of at least 350.000 thousand euros (soon to be updated to 500.000 euros in the upcoming year of 2022) for the creation of a commercial society with head office in the national territory creating 5 permanent job contracts or reinforcing the social capital of an already existing commercial society with head office in national territory with the creation or maintenance of 5 permanent job contracts for at least three years.

After fulfilling one of the investment requirements, beneficiaries are granted: full residency and work rights, family reunification rights, rights of circulating in the Schengen area without a visa, and the possibility of applying for Portuguese nationality according to naturalisation requirements. For this, they have the following duties: to stay in Portugal at least, seven days

in the first a year, and 14 days every two subsequent years. The exemption of long-term permanence highlights the utilitarian view of the programme as a way of channelling investment.

The programme nevertheless poses challenges for social cohesion, as unequal paths for nationality are being reinforced (Gaspar & Ampudia de Haro, 2020). For other foreign residents, they are expected to follow “territorial” citizenship laws and develop place and labour-type involvement, and belonging (Bhatia, 2008), whereas for wealthier applicants an exception is made. This legal innovation is configuring entry and residency rights and duties by differentiating foreign residents according to their economic capital (Ley, 2003; Mavelli, 2018), following the trend of neoliberal shifting of priorities: from labour and production towards property and consumption (Comaroff & Comaroff, 2001).

In Table 4.1 we can observe the increasing number of residency-by-investment beneficiaries throughout the years in Portugal. In relation to the number of beneficiaries, there was a significant decrease in the year of 2015, mainly because of the corruption scandal that was widely publicized in the media. At the time, government officials were being accused of helping Chinese applicants with hastier application procedures in exchange of bribes. There were also issues resulting from the lengthy application processes that led to many applicants to give up their ongoing applications and try elsewhere. Still, beneficiaries came back to a regular number in the years after that, even during COVID-19 (2020-2021) – probably following the surge in interest in this type of programmes, seeking the possibility of mobility (during a time in which non-essential mobility had been restricted to non-residents) and security/other housing conditions in other places in the world.

**Table 4.1** *Residency-by-investment trends from 2012 until 2021.*

<b>Year</b>	<b>Residency-by-investment primary beneficiaries</b>
2012	2
2013	494
2014	1526
2015	766
2016	1414
2017	1351
2018	1409
2019	1245
2020	1182
2021 (until August)	550
<b>Total</b>	<b>9939 (37%)</b>
<b>Family reunification</b>	<b>16841 (63%)</b>

<b>Total number of beneficiaries</b>	26780 (100%)
<b>By criteria</b>	
Purchasing Real Estate: (3) & (4)	9321
Capital Transfer: (1), (5), (6) & (7)	598
Creation of 10 jobs: (2)	20
<b>Main nationalities</b>	
China	4972 (50%)
Brazil	1031 (10%)
Turkey	475 (5%)
South Africa	412 (4%)
Russia	393 (4%)

*Source: Gaspar & Ampudia de Haro, 2020; SEF, 2013, 2014, 2015, 2016, 2017 2018, 2019, 2020, 2021b*

In terms family reunification, family members reuniting with primary investment residents are 16841 (63%). This indicates how the programme might be more than a way of investment – and of “migration without settling” (Liu-Farrer, 2016). This is also a family endeavour of searching a life elsewhere (Gaspar & Ampudia de Haro, 2020; Studemeyer, 2015).

Regarding the preferable investment activity, purchasing real estate is by far the most popular option (9321), in stark contrast with the possibility of creation of job contracts (20). In the late 2019 there were plans to change the conditions of the purchase of real estate property in the larger urban areas. Because of the pandemic there had been delays in putting it into practice. However, from 2022 onwards, this investment will only be possible in areas of low population density. Some claim that this is “the end” of the programme, because the purchase of property in the big urban centres such as Lisbon and Porto were considered good investment opportunities with good annual rentability and an important attractive feature. With this measure, the national government tries to mitigate the increasing property prices the urban areas had suffered in the last years to which this programme might have contributed to. This is an example that shows how policies -oriented to support the global dynamics of the market – affects individuals and groups relations *in place* – in this case in the city (Bosniak, 2000).

Lastly, the main nationality applying to this programme are Chinese nationals (50%). Chinese nationals make up the largest nationality interested in this programme, not only in Portugal and Europe, but in the world (Liu-Farrer, 2016). Research has pointed to how this legal innovation has transformed Chinese migration patterns and profiles in Portugal. Whereas in Portugal, Chinese migration was mostly related to economic migrants, related to retail businesses and restaurants (Gaspar, 2017, Rodrigues, 2013). The residency by investment programme propelled the entrance of middle/upper-class Chinese migration. This also brough

about new businesses and job opportunities to Chinese nationals and Chinese descendants in Portugal (Gaspar, 2017). The transformation of this well-established community of Chinese in Portugal, requires further attention to the ways in which the articulation of the global markets and local/national policies relate to new migratory patterns and other configurations of citizenship (Amante & Rodrigues, 2020; Glick-Schiller & Salazar, 2013).

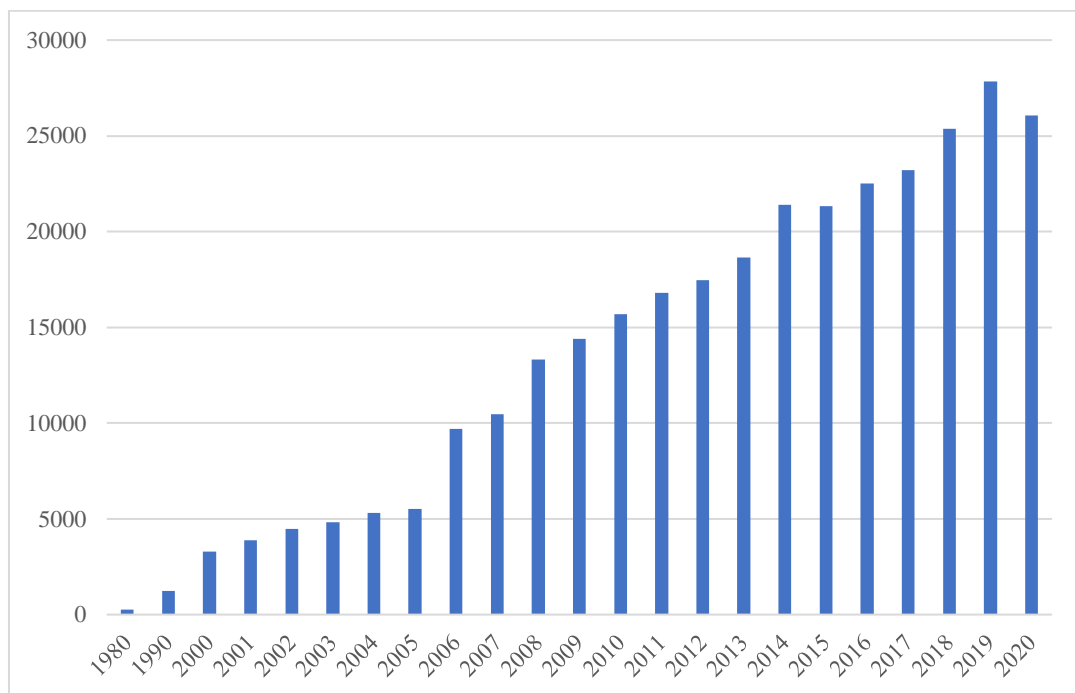
### **4.3. “New” and “old” Chinese mobilities to Portugal: an overview**

In the year of 2020 there were 26074 Chinese nationals with a residence permit in Portugal, the sixth most expressive group of third-country nationals (SEF, 2021). This is the result of different movements and mobility trends. A temporal overview of the Chinese mobilities to Portugal can identify two different clusters of mobility with specificities within them. The first, and the oldest – journeying between the 70’s and the 90’s – can be said to result from colonial ties and relationships that are particular of the Portuguese context. This is the case of the Chinese that lived in Mozambique during colonial times and that later came to Portugal after the Mozambican independence. It is also the case of the Macanese in Portugal (Gaspar, 2017; Matias, 2010). In both cases, the degrees to which the connection to mainland China was maintained varied greatly, and sometimes it was inexistent (Matias, 2010).

Of more relevance for this dissertation, however, are the mobilities from mainland China to Portugal – the second cluster. These are Chinese mobilities that in a way were simultaneously part of other mobility trends in the world. In this category it is possible to identify three trends, particularly in context of newly receiving countries of migration, such as Spain and Italy (Gaspar, 2017).

Some families arrived in Portugal as early as the 30’s, but the most intense movement of Chinese nationals started from the beginning of the 2000’s (Baptista, 2006). They came from the province of Zhejiang, a well-known port of exportation, started to arrive in areas where there was potential for business opportunities and trade (Masdeu Torruella, 2019). These were “economic-accumulator” migrations (Nyíri & Beck, 2020). Some of them establishing in Portugal with retail and catering businesses to obtain better living conditions and economic opportunities (Neves & Rocha-Trindade, 2008). As visible in the Figure 4.1., in Portugal, this was the wave that justified the rapid rise of Chinese nationals in Portugal, especially in 2006. This migration trend, partly because of Chinese economic policies of more participation in the

global market, is commonly called *xinyimin*, i.e., *the new migration* in the literature (Rodrigues, 2013).



**Figure 4. 1** Variation in Chinese residents in Portugal from 1980-2020

Source: Gaspar & Ampudia de Haro, 2020; Amante & Rodrigues, 2020; SEF, 2013, 2014, 2015, 2016, 2017 2018; 2019, 2020, 2021b

A second trend consists of university students (Gaspar, 2017). The proliferation of university exchange programmes with Chinese universities, along with the crescent interest of Portuguese language as a university major (in 2000 there were three degrees of Portuguese, in 2014 there were already 16 universities with this option, Yuan, 2014), made the mobility of university students to Portugal more prominent. This type of mobility is usually short-term, during the time of the pursued degree, although it is not always the rule (Lin, 2012). This is a trend that also extends to other Western countries, particularly in the US and UK, because obtaining a university degree abroad is a way of playing with the competitiveness of the global market panorama.

Lastly, the third wave of migration is considered the “business migration”, combining migration and economic policies (Gaspar, 2017). In Portugal in particular, this wave of migration was propelled by the residency-by-investment legal innovation mentioned in the previous section, where Chinese nationals were always the top group of applicants. Estimated by Amante and Rodrigues (2020), in the year 2018, resident by investment and their family

members, living in Portugal comprised 46,1% of the total amount of Chinese residents in Portugal. As seen in Figure 4.1, in 2013, but especially in 2014, we can see a peak in Chinese residents in Portugal, responding to the mechanism of attraction of wealthier migrants. Given the possibility to have residency rights without actual permanence, it is possible that these residents are indeed not staying but enjoying the flexibility of mobility.

During the economic crisis, contrarily to the overall migratory trend of decrease in foreign residents in Portugal (SEF, 2013, 2014). Chinese residents were the only group increasing in numbers compared with other migrant groups. This is particularly relevant because the economic crisis and the implementation of this legal mechanism for residency, not only attracted new Chinese residents, but helped maintain older generations (the “new” migration, *xinyimin*, that is now the “old” migration, *laoyimin*) through new business ventures and opportunities. Contrarily, Brazilian and Ukrainian nationals saw numbers decreasing given the soaring unemployment rates at the time (Esteves et al., 2018). Chinese residents, instead, saw an opportunity to create real estate companies with Chinese information and interpreters to aid the new flow of migration. The older generations became then important promoters of the programme as well as intermediaries for the new investment/business migration allowing for the integration with the local community possible (Amante & Rodrigues, 2020; Gaspar, 2017).

Although this type of investment migration has been especially visible in Portugal because of the implemented programme, it is true that many years prior the ethnic Chinese in Southeast Asian countries have been pursuing the flexibility of places, passports, and nationalities for economic/investment purposes (flexible citizenship, Ong, 1999). The current wave of Chinese wealthier migration to Portugal seems to follow a similar pattern, seeking economic stability and security (Ley, 2003; Ong, 1999; – however, now, other lifestyle choices seem to underpin the desire to “buy emigration”, i.e., engage with mobility as a commodity, granting access to elite circles (Liu-Farrer, 2016; Studemeyer, 2015). The current configuration seems to emphasize “lifestyle consumption” (Torkinton, 2012), instead of capital accumulation. Fleeing pollution and problems with food safety in mainland China, the possibility of offering a less competitive educational system for their children, granting them easier access to Western universities, are some of the motives that have led Chinese families to apply to the investment programmes around the world (Nyíri & Beck, 2020). “Emigrating without settling” was the slogan used by the many Chinese agencies that helped manage these applications, where different countries and citizenship-by-investment programmes were showcased in fairs held in Shanghai or Beijing (Liu-Farrer, 2016). Families could then pursue double and separated lives

between the destination country and mainland China configuring “astronaut” families (Liu-Farrer, 2016; Ong, 1999).

The economic crisis and the measures implemented in Portugal provoked staggering social inequalities at all levels (Amante & Rodrigues, 2020). In the Chinese community specifically and having into consideration the unequal access to residency rights from investment and non-investment programmes, emphasized these stark social differences as well. A legal framework was able to reconfigure the workings of the group of Chinese residents by proposing a programme that has in its heart the interests of a neoliberal agenda. It bears the question how the workings of these legal innovation were able to transform some of the socio-psychological dynamics of this group of foreign residents.

#### **4.4 Concluding remarks**

This chapter described the context in which this work is set. The perspective of social representations and social psychology of citizenship will be applied to the context of a new neoliberal law that has been implemented in different countries across Europe, although we will focus on the Portuguese case.

The residency-by-investment programme is the new neoliberal law in question. Its characteristics involves the configuration of citizenship where investment is valued in exchange to non or at all influence in community building and affairs (Gaspar & Ampudia de Haro, 2020). The consequences to such a configuration have led to transformations in the reality of a particular group of migrants in Portugal: the Chinese residents.

What previous literature on Chinese migration has showed is that this type of citizenship is highly desired for different means. The classic study by Ong (1999) argues that it is for capital accumulation. Progressively literature has grasped these tendencies in different ways and more complex understandings are present (Nyíri & Beck, 2020; Studemeyer, 2015). For the Chinese migration such programmes help foment views of citizenship that are cosmopolitan – and contrast heavily with the previous forms of mobility and migration trends.

It then bares the question how citizenship is being constructed and claimed in contrast with such a stratifying law. In the next section an overview of the goals of this dissertation will be presented, connecting it with the theoretical framework already presented in the last three chapters.





## CHAPTER 5

# **An overview of the current approach: The interaction of new laws and everyday meaning-making in the construction of neoliberal citizenship**

This dissertation presents an approach to citizenship exploring the interdependent and dynamic relations between the legal/institutional sphere and the consensual/common sense one and their implications for the construction and reconstruction of meaning(s) of citizenship (Castro, 2012, 2019; Castro & Santos, 2020; Castro & Batel, 2008; Elcheroth et al., 2011). In this sense, this work will analyse the interrelated dynamics of the reified and the consensual spheres and how these are shaped by the logics of the global political economies and by neoliberalism as a political rationality (Glick-Shiller & Salazar, 2013; Ong, 1999, 2006, 2007). The object of study will be the Portuguese legal innovation that values citizen's capacity for investment and exempts them from long-term permanence/community building (Shachar, 2017; Tanasoca, 2016): the Residency Permit for Investment Purposes. We will particularly look at the Chinese residents in Portugal, the larger group of beneficiaries (Gaspar, 2017; Gaspar & Ampudia de Haro, 2020; Amante & Rodrigues, 2020).

Following the meaning-making approach proposed by TSR, we will rely on the definitions of the reified and consensual spheres (Moscovici, 1984, 1988) to account for the institutional side of citizenship and everyday citizenship (Andreouli, et al., 2016) that are present in different social domains.

First, we will be exploring the reified sphere. We will explore the meanings - social representations and values - privileged in the texts of a set of laws that regulate foreigners' entry and residence in Portugal. Analysing how such meanings exclude/include certain (foreign) individuals and groups from the country, and how those included are offered/not offered certain rights and duties (Bosniak, 2006). The role of mediating systems part of the reified sphere in re-signifying the text of laws will also be explored, where experts interpret them and translate them into practices. This is illustrated through interviews with professionals from one such system. These are relevant processes for a better understanding of the (always provisional) definitions

of who is deemed the *acceptable* foreign citizen - reflecting its constructed and plural nature (Andreouli, 2019)

Second, we will explore the realm of everyday meaning-making, the consensual sphere. We will explore the processes in which these legal meanings are integrated and made sense of in everyday life (Castro, 2012). We will focus on the residency by investment programme that reifies different co-existing legal constructions of the citizen with two distinctive processes of inclusion (Gaspar, 2017). This work will try to fill the theoretical and empirical gap of the social psychology of migration and foreign residency (Verkuyten, 2018) and the social psychology of citizenship (Andreouli, 2019) in conceptualizing and analysing the processes related to a new (neoliberal) definition for foreign residency brought by a new law - where the value lies in the individual's potential for investment in the global market (Brown, 2016; Ley, 2003; Mavelli, 2018; Parker, 2017; Tanasoca, 2016). Particularly, this work will explore the different social representations and strategies employed in making sense of such a legal innovation: how it is presented to and discussed by the polity and informing/manifesting in the relationships among people and groups.

In the domain of the consensual sphere, we will then analyse the representations of (a) one mediating system part of the consensual – the press –, (b) the perspective of Chinese investment residents and other relevant actors from this community, and (c) the perspective of the overall Portuguese host society in relation to such category of foreign residency.

We will then start to explore how the residency-by-investment programme is presented to the public in the press, in the *generalization phase* (Castro, 2012) of the implementation of a new law. Given the neoliberal orientation of this law, we will enquire whether its presentation is equally shaped by the logics of neoliberalism that depoliticises the issue - closing down the debate of other citizenship configurations and normalizing these policy choices as technical solutions for the problem of the economic crisis in Portugal (Amante & Rodrigues, 2020).

A perspective of everyday citizenship will orient the exploration of the Chinese investment residents' perspectives about this programme. We will explore how the implemented proposal of citizenship is made sense of in everyday life, and whether and how it is dividing the community of Chinese residents, particularly, in the ways in which mobility claims can be differently advanced and manifested. We will also explore if, indeed, the claims of these residents are aligned with a view of 'the way the world is' (Castro & Mouro, 2016), responsible for hindering other citizenship configurations and alternatives and the inequalities brought by such a programme.

Finally, we will enquire how such categories of the law – and the proposals of citizenship they carry – are affecting the perspective of the host society in relation to the Chinese residents that better embody them. Particularly, assuming that the issue of “selling citizenship” might be presented to the public under the guise of undeniable (and rational) economic advantages, intergroup relations and outcomes are very likely to change in relation to these categories. These outcomes should change in relation to perceived threats and contributions they might bring to the country. We will then test whether the legal category of residency by investment puts Chinese residents in a more positive light because of their potential for investment.



## **SECTION II. EMPIRICAL RESEARCH**



## Study 1 – Social representations of citizenship inscribed in foreign residency laws and re-signified in implementation<sup>2</sup>

### 6.1. Introduction

This study draws on the interdependent and dynamic relations between the legal/institutional sphere and the consensual/common sense one in constructing and shaping citizenship in relation to foreign residency (Castro, 2012; Castro & Santos, 2020; Castro & Batel, 2008; Elcheroth et al., 2011). As stated in Chapter 2, the study of meanings of citizenship requires an analysis of citizenship's double face: how it is a mechanism of control, as well as one of empowerment (Bloemraad, 2018); a tool for re-configuring the power relations we want to see transformed, but also for creating new ones. This two-sidedness of citizenship illustrates how the tension between “agency and structure” (Giddens, 1979) needs to be maintained at the core of concerns with citizenship. However, still lacking in social psychology is a more comprehensive focus on the institutional side, and an examination of the *generalization phase* of law implementation (Castro, 2012). This is the phase in which laws are presented to the public and implemented by expert mediating systems, i.e., a phase integrating the reified proposals of the law, with everyday meanings of citizenship.

We draw from the analytical distinction between the reified/institutional and the consensual/everyday spheres proposed by the theory of social representations to look at how shared meanings are constructed and transformed (Andreouli & Howarth, 2013; Batel & Castro, 2018; Moscovici, 1988;) and collective agreements established and contested in the interaction between both spheres. Some consensus and collective agreements are reified through formal institutions and institutional facts, such as laws (Castro, 2012; Elcheroth et al., 2011), creating the reified sphere (Moscovici, 1981). In the reified universe, rules for action are created by making options amongst certain shared representations and values, with some included and organized in certain orders of priority, and others excluded (Castro & Santos, 2020). National laws are an example: the values and representations they incorporate (e.g., the value of paid

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<sup>2</sup> A version of this study has been submitted for publication: Santos, T. R. & Castro, P. (under review). Shaping citizenship: a socio-psychological analysis of the Portuguese foreign residency laws and their implementation. *Journal of Social and Political Psychology*.

employment, Lister, 2007) are *chosen* in a given time and nation, their legitimacy only granted for as long as such values and social representations remain shared (Negura et al., 2020). This means that they are a simplification of the always broader heterogeneity of meanings existent in a nation. However, this simplification may keep unresolved tensions, keeping some dilemmas and tensions open (Billig, et al., 1988; Gray & Griffin, 2014). One example are laws that identify desirable goals, but not rules guiding practices. This generic formulation makes them more vulnerable to resignification through interpretation (Batel & Castro, 2008; Castro, 2012).

Also, the creation of laws privileging certain (shared, consensual) values and representations, does not make contradictory ones disappear (Moscovici, 1988). Sharedness at the level of the consensual universe of a nation is inevitably imperfect: not all individuals and groups will share the more consensual values and representations in a nation; and not all individuals and groups will prioritize them in the same ways (freedom over security, or vice-versa) (Castro, 2019). A range of reactions are to be expected when new laws are implemented – from acceptance to contestation (Batel & Castro, 2009; Castro, 2012) – even at the institutional level (Ribeiro et al., 2014). Nourished by the plurality maintained alive in the consensual sphere (Billig et al., 1988), agency and transformation can then find their space (Moscovici, 1981; Howarth, 2006).

The interdependence of the two universes is particularly clear in the expert mediating systems (Castro & Batel, 2008) in charge of implementing the laws. Research with these systems has shown, for example, how experts in urban development can re-interpret public participation laws in ways that minimize their potential for changing participation practices (Castro & Batel, 2008) or how mental health experts integrate theory – as a reified form of knowledge – with everyday experience to design treatment plans for their patients (Foster, 2003; Morant, 2006). This signals that for interpreting the laws and proceed with implementation, such mediating systems draw from the consensual sphere (Castro & Batel, 2008). Therefore, analysing the meanings they mobilise is a way of exploring the dynamic relations between the two universes, and their fluid nature, unveiling the processes in re-enforcing some values and representations, rather than others.

Regarding a social-psychological understanding of foreign residency, this perspective calls for attention to the meaning-categories inscribed in the legal frameworks regulating it, i.e. those laws that define under what conditions people are deemed/not deemed worthy of entering/staying in a foreign country (Andreouli & Howarth, 2013; Bosniak, 2006; Figgou, 2016), *before* naturalization. In most countries, third country nationals, for example, if they



arrive for working in a factory (already with a contract) will be accepted; if they come as street artists to live from street donations, they may not. Moreover, and illustrating the dynamic interdependence of the reified and the consensual universes, in time the laws can change to accommodate new meanings. This happened recently in many European countries with the introduction of the value of “investment” as a new basis for residency (Shachar, 2017).

This study then explores meanings of citizenship privileged in the texts of a set of laws that regulate foreigners’ entry and residence in Portugal and how such meanings exclude/include certain (foreign) individuals and groups from the country, and how those included are offered/not offered certain rights and duties (Bosniak, 2006). This perspective also highlights how the text of laws is re-signified in a mediating system in charge of implementing the laws, where experts interpret them to translate them into practices. This is illustrated through interviews with professionals from one such system.

## **6.2. Context, objectives, and research questions**

The main current Portuguese legal framework for Foreign Residency - regulating the entry, exit and permanence of third country nationals, and defining the rights and duties associated to this permanence and the necessary steps for accessing them - was first established in July 2007 by a law (*Law 23/2007 of July 4*), followed by a regulatory decree and consequent alterations. This is the set of documents we will analyse.

The main mediating system/institution applying these laws is the Portuguese Foreigners and Border Service (*Serviço de Estrangeiros e Fronteiras*), aided by other governmental agencies helping foreigners make sense of the laws and the procedures for obtaining legal residence. The experts interviewed for this study are from one such institution, composed mainly by lawyers and social workers that help foreign residents navigate these laws from a governmental institution perspective.

Focusing on this legal framework (n=11 legal documents) and on interviews (n=6) with the above-mentioned experts, this study aims to investigate:

- (a) the (choice of) values and social representations defining the status of the foreign citizen that the texts of the laws incorporate, and how they changed along the years;
- (b) how the text of law operates a simplification process: by choosing to integrate only some meanings (values and representations) from the heterogeneous and contradictory

ones existent in the consensual universe; and also whether and how, in some areas, this text allows ambiguity and diversity to remain;

- (c) how experts from a mediating system translate these meanings into everyday practices, particularly exploring how interpretation/re-signification for implementation may complexify the meanings of citizenship, by allowing other values and representations to help make sense of it.

## **6.3. Material and methods**

### **6.3.1. Legal documents**

The 11 documents collected - produced over 11 years (2007-2018) – form the main legal framework regulating the entry, exit and permanence of third country nationals in Portugal: (1) the main *Law 23/2007 of July 4* and its 5 alterations (*Law 29/2012 of August 9*, *Law 56/2015 of June 23*, *Law 63/2015 of June 30*, *Law 59/2017 of July 31*, *Law 102/2017 of August 28*), comprising on the whole 6 legal documents; (2) the regulatory decree associated with the main law - *Regulatory Decree 84/2007 of November 5* - and its 4 changes (*RD 2/2013 of March 18*, *RD 31/2014 of February 27*, *RD 15-A/2015 of September 2* and *RD 9/2018 of September 11*) comprising on the whole 5 legal documents.

Other, less pertinent, documents specifying procedural aspects, particularly fees to be charged, were not examined (e.g., *decrees 1334-E/2010; 35-A/2012*). Also following this same logic, some sections of the legal documents analysed here were also excluded: those related to tourists, asylum seekers and cases of human trafficking.

Legal documents are usually organized as follows: chapter, section, and articles. A thematic analysis was performed (following Batel & Castro, 2018; Braun & Clarke, 2006). The articles - sequentially numbered throughout the documents – are thus used to support and illustrate the analysis exploring the values and social representations guiding their choices of authorisations and prohibitions.

### **6.3.2. Legal experts**

Experts from a mediating system – a governmental institution helping migrants make sense of foreign residency laws - were interviewed (n=6; 4 lawyers; 2 social workers). The interviews

(mean duration=1h42) were conducted by the author of this dissertation, from July to September 2019. Interviews were presented to the institution and participants as seeking to understand what type of challenges foreigners face to acquire a formal status as residents. There were questions about their everyday work-place activities and the type of support they provided. Interviews were tape-recorded with the participants and the institution's consent and transcribed *verbatim* (Annex A. informed consent and interview guide). We performed a discursively oriented thematic analysis, focusing on content and process (Batel & Castro, 2018), to explore how the proposals of the law are made sense of in their daily understandings, and the processes involved in the re-signification of the meanings of the law. The most representative extracts will be used to illustrate the analysis.

## **6.4. Analysis and discussion of the legal documents**

In what follows, a descriptive analysis of the legal articles in their current formulation is first presented. Secondly, the transformations across 11 years are identified. By comparing and contrasting the values in the articles/sections excluded, added and altered, we evidence how the choices for defining the foreign resident changed along the years, and the consequences of such choices to how certain individuals and groups are excluded/included and are offered/not offered certain rights, as well as how these choices are simplifying and/or contributing to ambiguity in the meanings of citizenship.

### **6.4.1. Values and social representations in the laws**

The law defines necessity criteria for residency that are to be applied to all (art. 74°, 75°, 76°, 77°, 78°, 79°, 80°, 81°, 83°, 85°) – e.g. showing a clean criminal record. Then it defines specific criteria and specific requirements for entry and permanence that are adapted to the different migration purposes.

The *reified reasons* for granting residency to migrants – i.e., the reasons the text of laws define as valid for accepting foreign residents – are anchored in certain values; these in turn, accommodate a range of slightly different regimes by specifying the intended activities and the criteria to pursue them with more detail (see Table 6.1 for a summary). The three big purposes that the law specifies today as acceptable for residency are the following: work (8 regimes), study and unpaid work (6 regimes) and investment (1 regime).

Work, is thus the main value in this law: those who prove they contribute to the country by engaging with the formal job market, and guaranteeing (at least) minimum wage, are seen as *worthy foreign residents*; here, contract worker (art. 88°) and independent worker (art. 89°) are examples of regimes. Residency through work requires presence in the country: it is only granted/renewed to those staying at least 6 months per year in the country (art. 85° 2-).

**Table 6.1** Choices of values according to the legal articles and residency regimes defined

Values	No articles	Articles	Regimes
<b>Work</b>	n=39	art. 51°-A, 55°, 56°, 56°-A, 56°-B, 56°-D, 57°, 59°, 60°, 61°, 61-A°, 71°, 71° -A, 88°, 89°, 90°, 116°, 121°-B, 121°-F, 121°-H, 121°-I, 121°-K, 123°-A, 124°-A, 124°-B, 124°-C, DR 17°-A, 19°, 19°-A, 21°, 22°, 23-A°, 30°, 31°, 32°, 54°, 55°, 56°	(n=8) - seasonal contract work - contract worker - independent worker - teaching, highly qualified and cultural work - EU residents in Portugal as contract or independent workers - EU “Blue card” for highly qualified workers - company transfers in EU - within company transfers
<b>Study and Unpaid Work</b>	n=24	54°, 57°, 62°, 63°, 91°, 91°A, 91°-B, 91°-C, 92°, 93°, 94°, 95°, 96°, 97°, 97° -A, 116°, DR 23°, 23-B°, 33°, 57°, 58°, 58°-A, 58°B, 60°	(n=6) - university students - researchers - high school students - trainees - volunteers - EU residents in Portugal enrolled in a training programme
<b>Investment</b>	n=8	90°-A, DR 65°, 65°-A, 65°-B, 65°-C, 65°-D, 65°-E, 65°-K	(n=1) - investment
<b>Family reunification</b>	n=12	64°, 98°, 99°, 101°, 103°, 100°, 106°, 107°, 108°, 118°, DR. 66°, 67°	(n=1) -family reunification (associated to other regimes only)

<b>Humanitarian Reasons</b>	n=5	68°, 122°, 123°, DR. 61°, 62°	(n=2) - exempt of entry visa - situations of exception that need to be analysed case by case
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The second value guiding the possibility for residency is study in formal programmes (residency is less possible, for instance, for people who might wish to reside to become a self-taught artist, for example) - and other forms of unpaid work, such as a traineeship (art. 93°) or volunteer work (art. 94°). However, these residents cannot stay after this activity ends – contrarily to work and investment regimes that allow long-term residency and permanence.

The third value is investment (art. 90°-A); it grants residency rights to people that invest in different areas – the most common one is through the purchase of real estate for more than 500.000 euros (SEF, 2021). Residents per investment have the right to stay long-term, as do residents per work, yet they have totally different duties regarding length of stay – they have a mandatory stay of only 7 days a year and 14 days every two years (RD art. 65°C), not 6 months. In practice, this is expressing that residency per investment is as valuable as physical permanence.

Besides the three main purposes, two other paths allow for residency - family reunification (1 regime) and humanitarian reasons (2 regimes). The right to family reunification is a secondary one only granted to individuals already accepted under one of the three main values for residency. Yet this intersection is not equal for the three main values – not all types of students have the right of bringing close family members to join them, for example, while all investment residents have this right.

In other words, non-nationals are deemed worthy of staying in Portugal if they engage in formal work (and pay taxes), study or investment activities. The above-mentioned regimes for residency, simplify/restrict the potentially multiple valid reasons/values for receiving residency rights, defining the *good* foreign citizen, and thus the scope of citizenship.

Next, the analysis will clarify how new values were added or became more prominent over time, in some cases accommodating (some of) the diversity of contemporary mobility.

**6.4.2. Transformations in the law: Processes of simplification and plurality**

As new meanings become more shared in society, they are sometimes reflected and visible in new formal collective agreements: legal innovations, i.e., new laws and regulations and their alterations (Castro, 2012). Since the creation of the main foreign residency law in 2007 (*Law 23/2007 of July 4*), 5 alterations were published that brought transformations to the residency options available (see Table 6.2 for an overview). The most considerable changes relate to the residency-by-investment programme, although other important changes affected study and work regimes.

The investment legal innovation was first implemented in 2012, during the first alteration of the law, and proposes consumption to be as equally valued in society as production, a trend reflecting neoliberal priorities (Comaroff & Comaroff, 2001).

**Table 6.2** Transformation of the foreign residency laws 2007-2017

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
2007 - Foreign Residency Law	August 2012	June 2015	July 2015	July 2017	August 2017
1-220 Articles					
Articles Altered	58	3	5	3	22
Articles Added	19	-	-	-	25
Work	++ Possibilities for qualified workers		+	++ Residency permit for undocumented workers	++ Possibilities for qualified workers
Study					++ Mobility possibilities for students
Investment	+++ Introducing investment residency permits		+++ New investment possibilities		+

In the third and fourth alterations, options for residency-by-investment were expanded from 3 to 8 (art. 3 d). New investment possibilities - in urban rehabilitation programmes, scientific

and cultural initiatives or in small to medium companies - were added and investment through the creation of jobs was reduced from 30 to 10 jobs. This might have been an attempt to diversify the focus away from the real estate market that until then had been the largest preference by the applicants (SEF, 2017). The 2015 alteration also resulted in the clarification of procedures, contemplating different scenarios for long-term residency and family reunification (not initially contemplated). The easing of these procedures signals that residency for investment was prioritized in relation to the other procedures and residency permits. By supporting this possibility for the wealthy, however, the state legitimizes the “worthiness” of wealthy travellers to pursue cosmopolitan and global lifestyles (Calhoun, 2002), weakening the role of long-term permanence in citizenship-making (Gaspar & Ampudia de Haro, 2020; Ong, 2006).

Now regarding the work regimes in particular, the transformations in the text of the law further accommodate the value of fiscal participation in the country. From 2017 onwards, all those *working and already paying taxes* in the country are automatically granted residency, even without a residence permit (88º; 89º). In the first version of the law this was an exception: sometimes residency was granted to those paying taxes but without the right to do so<sup>3</sup>. This means that in the past, although this regularisation was already possible, it was left to institutional discretion (Gil, 2017). To solve this ambiguity, the recent alteration makes it a rule that all taxpaying workers are granted a residence permit. This transformation, however, heavily values the capacity for engaging with the labour market (Langout & Fernández, 2018) regardless of the condition in which the person entered the country. This illustrates how ambiguities in the law have created spaces for re-signification that have the potential to either restrict or expand people’s rights in practice (Barnes, et al., 2004; Tuffin & Frewin, 2007).

Residency through humanitarian reasons did not suffer any alteration and has kept a vague definition of what it entails (Batel & Castro, 2009). The ambiguity of the procedures and requirements, in this case, makes it an only secondary value, difficult to put into practice. Still, at the same time, it constitutes a reservoir of last resort options, whenever foreign residents do not seem “to fit” the predetermined values and regimes.

Finally, some new alterations establish clearer guidelines for supporting the mobility of highly qualified workers, academic researchers, and investors. These transformations legitimize mobility rights as natural and unproblematic for groups of people, differentiating characteristics

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<sup>3</sup> The Portuguese Foreigners and Border Service was vehemently against this alteration (Marcelino, 2017). They claimed that there were no institutional conditions to implement this regularization mechanism and led to the resignation of the director at the time.

– able to invest, able to work –, and bestowing more rights to some of them, creating groups and identities that are in practice different (Santos et al., 2020). This suggests that as migration becomes diversified, there is a surge for more global and complex understandings of identity and belonging (Ellis & Bhatia, 2019) and the law accompanies this flexibility by only granting it, however, to a group of people only (Mitchel, 2016).

In sum, the texts of the laws define the relevant values (work, study, investment), thus simplifying from a range of potentially usable ones. Yet they also leave dilemmatic, less clearly defined paths – opening the door for other values that were left out of the laws but remain alive in the consensual universe to enter in practice – i.e., opening the door for complexification. This is as mentioned the case of undocumented contract workers that used to depend on the institutions’ decision – not the law – to become documented.

The process of complexification in practice depends heavily on mediating systems, the main protagonists in populating the values and representations of the law with other values and representations not originally contemplated. This is illustrated next.

## **6.5. Analysis and discussion of the interviews with experts**

### **6.5.1. Mediating systems in re-signifying the laws**

In choosing some goals/values/meanings for anchoring the decision of allowing foreign residents to (legally) stay in the country, the text of law operates simplification processes: from the multiple and heterogeneous potentially relevant meanings living together in the polity, these are the ones selected. Yet, those implementing the laws (e.g., in mediating systems – Castro & Batel, 2008) are known to have agency in their interpretation processes (Morant, 2006). For these they draw from the heterogeneity of the consensual universe – and thus their re-significations may result in complexification and plurality (Castro, 2012). We will first illustrate (1) how mediating systems can complexify through institutional inconsistency or lack of regulations, and (2) how mediating systems can re-enforce group differences further, by making sense of the laws using representations that make group differences more prominent.



### **6.5.1.1. Complexifying by interpretation**

The interviewees all insist on the centrality of the processes of interpretation of the law, highlighting the distinction known in the literature as distinguishing between the legal ‘theory’ and the institutional ‘practice’ (Castro & Batel, 2008; Tuffin & Frewin, 2007) and how often these are unconnected. This is shown below, where a legal expert (extract 1) and a social worker (extract 2), describe the law itself as well designed and with no need for improvements: it is clear and provides rules for action. However, its implementation is presented as *lacking consistency* in the bestowing of rights to foreign residents (extract 1), or as lacking verification (extract 2). In both cases, these depictions point out how implementing the laws may result in lack of stability of their meanings, introduced by re-significations and the potential space for action they open.

#### *Extract 1- legal expert*

*Most difficulties do not come from the law. It’s from... what we usually say, is, well, each public service has its own law, isn’t it? And then each one of them has their own interpretation of the law. For me that’s the issue, most of the times the more complicated one, which is... most of the times there is no full, hum... consistency... in the implementation of the laws, not even within each institution.*

#### *Extract 2 – social worker*

*I believe that the law itself does not need alterations; it is the implementation of laws that is not being verified. Services are not complying with the law in Portugal. Namely, and related to my work, the Social Security service doesn’t... the law says that every citizen with a residency permit is entitled to a social security number. It facilitates a lot, in terms of social support, but Social Security services do not comply.*

The lack of consistency is clearly situated in these extracts in the realm of the agency of mediating institutions and not in the text of law, as different institutions develop “their own laws”: through different ways of interpreting the text. These interpretations are necessarily anchored in meaning categories: in values and representations that can be expressing institutional cultures but also personal positions (Castro & Batel, 2008). In this sense, these extracts illustrate the acknowledgement of these professionals of how meanings from the reified universe become in practice populated by non-reified ones: heterogeneous representations from

the everyday universe, re-gaining their place inside and alongside the reified ones, resulting in configurations in which the reified and consensual are deeply intertwined (Morant, 2006) but may become difficult to contest (Batel & Castro, 2009).

According to the experts, the inconsistent interpretations and practices by institutions can be due to the absence of a regulatory decree that explains how ‘practice’ should be met by new general guidelines of the law, as seen in extract 3.

*Extract 3 - legal expert*

*Then, the law comes out, usually, the regulatory decree comes out too, if it does not, the law cannot be applied in a lot of situations, because without the regulations we can't know what it means, because regulations define documents, procedures, all those things. The law is generic, fine, from there on... we... if a regulatory decree doesn't come out immediately after, it's an impasse, a yes/no situation... the (old) law can't be applied, as it was repealed, so that's when Foreigners and Borders Service (the primary mediating institution) sometimes offers us some guidelines, 'you do like this, you do...' Those are guidelines we try to follow. Which is also a bit... (...) The law writes more or less the documents needed but we know that in practice that... well, look, Foreigners and Borders Service... Foreigners and Borders Service is close by and we know that it's never only that document that is needed.*

Extract 3 refers again the complexification of the reified, now in even further detail, and elucidating how the main law is not detailed enough to explain procedures and bureaucratic practices associated with its values. A regulatory decree needs to be issued so mediating systems – and foreigners – can make sense of the requirements of the law. It is the primary mediating institution in these matters –Foreigners and Borders Service - that guides other mediating systems to adapt to the lack of guidelines. The legal experts here interviewed have a privileged access to this Service, having the means to contact it directly, and that is how they advise the foreign residents that seek them. “It’s never only that document that is needed” suggesting that the law gives ample space for re-signification of how its meanings can be turned into specific rules and documents to be filled. By doing this, however, the primary institution re-signifies the law in ways that are not completely public or transparent, posing challenges to citizenship access.

### ***6.5.1.2. Complexifying by accentuating differences between groups***

Moreover, the laws can be said to be complexified by the accentuation and amplification of the differences between groups that they already establish. These differences are taken by mediating systems (and other social actors) through the values and representations of the consensual universe that they operate with. For instance, and according to these interviews, the work regime for residency is tightly connected with the representation of the “economic migrant” (Erdal & Oeppen, 2018). The lack of institutional consistency and of procedural clarity in bestowing foreign residents their rights is by these interviewees viewed as adding to the disempowerment of these migrants (Andreouli & Howarth, 2013). As illustrated below (extract 4), foreign residents that want to reside by means of work “are willing to do anything” to gain a legal status, in a situation the law itself creates, but that employers use to their benefit.

#### *Extract 4 – social worker*

*Migrants, in their minds they have no rights, they already know they have no rights, and they are willing to do anything, they come looking for us, in my office, even in triage or the judicial departments... they know they have no rights, so they go and they work, they work as kitchen helpers, because they know that only by paying taxes to social security can they (one day) get legal documents and change their lives.*

Extract 4 describes the dilemma of achieving a legal status through work. As previously described, a legal status depends on people’s capability to pursue work regardless of their documental situation. The law then shapes the ways in which citizenship is lived, but also, how it can be claimed (Anderson & Gibson, 2020), contributing to a legal context in which migrants know that they *need* to be in a situation in which “they have no rights” to eventually gain those rights (Andreouli & Dashtipour, 2014) - amplifying the representation of the “economic migrant” as “helpless”.

The situation of the foreign residents by means of investment is presented quite differently (extract 5): their wealth is presented as providing resources to aid the process of residency application. In this case, the complexification of citizenship is not due to lack of clarity in the law or its procedures, the law can offer precise and easier access to a legal status.

#### *Extract 5 – legal expert*

*People with a golden visa [residency-by-investment], those are people... we’re talking... people that are very well, financially, that can come here, it’s easy for them to come and*

*go, they can afford it, the other people that come here, they come because they want a better life. Contrarily, those [investors], they see here just another possibility for investment and enrich. They don't have the same difficulties. (...) compared to others, the process is very quick, quicker than for other people that are in a more vulnerable situation. They get here, they do it, they even have a specific department that only deals with golden visas, it's not general Foreigners and Borders Service, and they also usually have lawyers... they can skip the line, they have priority in scheduling.*

The ways in which the legal stipulations are put into practice, by making clear the differences between groups through institutional treatment, further complexifies citizenship and societies, as these differences are institutionalized (Andreouli & Howarth, 2013; Ellis & Bhatia, 2019). There is an accentuation of differences between the more vulnerable and the wealthier foreign residents not only because their rights are different, but because the institutions treat them differently as well (Andreouli & Dashtipour, 2014). In turn, the differentiation re-enforces different representations: of those who can afford mobility, and those whose mobility is a way of seeking “better lives” and are more “vulnerable”. This description helps to show how legally defined categories of foreign residents are then integrated and re-interpreted in light of understandings of mobility’s rights and privileges, crystallizing them in the everyday (Erdal & Oeppen, 2018). These differences result in different ways of understanding/representing and dealing with the (foreign) Other (Castro & Santos, 2020). They illustrate how laws create new groups/identities that can become the basis for further inequalities and serve as justification for inclusion and exclusion in the everyday experience of citizenship (Schrover & Schinkel, 2013).

## **6.6. Concluding remarks**

This study has sought to contribute to the social psychology of citizenship by presenting a dynamic perspective of the relations between the institutional and the everyday universes. It has used it to explore the role of the legal/institutional universe in operating a simplification process *vis-à-vis* the complexity of the meanings of the consensual/everyday one, by delimiting the values guiding the entry and permanence of foreigners, while keeping (some) ambiguities with potential for new complexities. It also explored the role of mediating systems in re-signifying these meanings, operating a process of complexification. The dynamics involved in the relation between the reified and the consensual universes, through mediating systems,

account for many power dynamics at the core of the concerns of a political social psychology of citizenship (Andreouli & Howarth, 2013). These dynamics were accessed by exploring the meanings - values and social representations - of citizenship as described by the law and analysing how laws are implemented and re-signified in practice through the accounts of a governmental institution that closely guides foreigners in making sense of formal residency requirements.

Looking at the primary legal documents, it was possible to understand how the law incorporates choices of (only some) values from the consensual sphere but may still carry tensions in it. The mechanisms were of simplification, e.g. – the definition of clear citizenship regimes -, but were of ambiguity too, through the keeping of vague – or difficult to put into practice (Gil, 2017) - meanings of citizenship, allowing greater re-signification and complexification to happen in its everyday experience (Andreouli & Dashtipour, 2014; Andreouli & Howarth, 2013; Andreouli et al., 2016; Gray & Griffin, 2014).

In the temporal analysis of the law, it was possible to show the transformations of values fuelled by everyday meaning-making: residency for investment purposes, for instance, was implemented at the time when the country was going through a bailout programme (Amante & Rodrigues, 2020), where economic incentives were collectively seen to be necessary. Transformations can also be sought to clarify meanings, particularly, when the law possesses contradictions difficult to put into practice in a consistent way (Gil, 2017). This highlights the interdependent and dynamic relationship between the reified and the consensual spheres, particularly noticeable in the everyday practices of expert mediating systems.

This study suggests that indeed, the implementation of laws and laws-institutions-public interaction may not be well coordinated (Gil, 2017; Ribeiro et al., 2014) and more attention is needed to the institutional processes of re-signification (Bloemraad et al., 2019; Vink, 2017). The interrelation of the reified and the consensual in institutional contexts unveils how complex the assumption of “primacy of the law” is (Tuffin & Frewin, 2007). When the guidelines are poor it allows the entrance of the consensual sphere to re-signified it, as common-sense influences professional cultures and practices (Foster, 2003, Morant, 2006). It is in this fuzziness of boundaries between both spheres that stabilization of power forces may happen, and transformation may happen too. These outcomes, however, may be a direct product of either a dialogical or monological way of interaction with the institutional-Other (Castro & Santos, 2020), shaping citizen’s understandings of citizenship in very different ways (Castro, 2012). Further studies should explore how foreign residents describe their interaction with these institutions and how these legal proposals and their implantation are made sense of.

The texts of laws, through the construction of different regimes, make distinctions between groups, some considered more, and some less, worthy to enter the country (Andreouli & Dashtipour, 2014; Figgou, 2016). They keep plurality in the definitions of citizenship through the co-existence of different values and rights (Shachar, 2017). This is particularly visible in the Portuguese case when the rights bestowed by residency permits obtained through work and investment are compared. The comparison shows how the legal innovation of residency by investment legitimizes a strong discrepancy in possibilities of ‘being’ and moving, as wealthier residents are legally granted more mobility rights and access to privileged institutional routes than the ones who pursue work (Shachar, 2017; Gaspar & Ampudia de Haro, 2020). The co-existence of these two citizenship regimes legitimizes different forms of engagement and affiliation with the polity, mediated by representations that, ultimately, re-enforce group differences and can be expected to affect intergroup relations in practice (Amante & Rodrigues, 2020).

Furthermore, the law, by emphasizing the individual ability to engage with the economic system and, above all, for bringing consumption as a valid residency purpose through investment (Camaroff & Camaroff, 2001), carries “psychologized tropes of neoliberalism” within them (Anderson & Gibson, 2020, p.10). The valued citizen is the *Homo Oeconomicus* (Brown, 2015) and individual economic value comes first and foremost over any other. More attention is thus needed to the role of laws in pushing this particular view of the self and its consequences to society (Anderson & Gibson, 2020; Langhout & Fernández, 2018), that will be explored in the upcoming empirical Chapters.

Finally, this study contributes to an integrated perspective of citizenship, highlighting the interdependent and dynamic relation between the reified and the consensual universes, with its processes of re-signification and meaning-making that make citizenship the contested and plural reality it is (Condor, 2011; Haste, 2004). In this regard, the study contributes to clarifying how, alongside the rule of law and the *reification* side of citizenship (Figgou, 2016; Gray & Griffin, 2013; Tuffin & Frewin, 2007), there remains space for different actors – with diverse degrees of proximity to the institutional universe - to make sense of citizenship (Andreouli, 2019; Bosniak, 2006). It also highlights how a better understanding of this dynamic relationship presupposes paying attention to the power of those actors (laws and people interpreting them) who get to define the reified version of the good foreign citizen and *how* these definitions help shape citizenship as meaning and practice.

## **Study 2 - Mediated communication in re-signifying representations of citizenship and foreign residency rights<sup>4</sup>**

### **7.1 Introduction**

This study focuses on the press presentation of the residency-by-investment law regulating foreign entry and residency (Ampudia de Haro & Gaspar, 2019; Gaspar & Ampudia de Haro, 2020; Ley, 2003; Mavelli, 2018; Parker, 2017; Tanasoca, 2016). This legal innovation (Castro, 2012) challenges the social psychology to focus on state-led innovations seen as stimulating transformations in subjectivities, relations, and shared meaning-systems – e.g., social representations (Moscovici, 1972) – that are suited to advance neoliberal goals.

The residency-by-investment law offers immediate residency rights to those investing a certain (sizeable) sum in the country, for example in private property, most notably real estate. It thus prioritizes capital over labour, and property over place- and community- bound involvement in the host country, as criteria for residency (see Chapter 4 for more details). This economization of citizenship is seen to reflect neoliberal values and priorities in the reconfiguring of the meanings of citizenship (Tanasoca, 2016). This is done by offering a deterritorialised and commodified version of citizenship rights (Joppke, 2019; Mitchel, 2016; Ong, 2006). These priorities, then, are seen to influence the creation of different sub-groups within the community of foreign residency: citizens/residents by labour and citizens/residents by investment and property. This has the potential to create further intra-minority conflicts, an issue requiring the attention of social psychology (Verkuyten, 2018). This the case of Chinese residents in Portugal, the largest group of residency-by-investment beneficiaries. The implementation of this law has been documented to transform the migration profile of this group, and how they are presented and discussed in the public debate requires analysis.

Furthermore, this study calls for a social psychology of mediated communication, capable of exploring how this legal innovation – a proposal of the reified sphere (Castro, 2012) – is constructed and presented to the citizenry in the media (Amer & Howarth, 2017; Castro, et al.,

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<sup>4</sup> A version of this study has been published as: Santos, T. R., Castro, P., & Guerra, R. (2020). Is the Press Presenting (Neoliberal) Foreign Residency Laws in a Depoliticised Way? The Case of Investment Visas and the Reconfiguring of Citizenship. *Journal of Social and Political Psychology* 8(2): 748-766

2018; Jaspal, et al., 2013; Kadianaki et al., 2020) – as a mediating system part of the consensual sphere. The press is a main mediator between the policy/legal sphere and the public – a main actor in helping the public make sense of new ideas (Carvalho, 2008; Castro et al., 2018). For instance, regarding the values and social representations of citizenship that the new residency-by-investment law carries, the specific ways in which they are presented in the press are consequential for how the public ends up viewing the nation’s common good (Andreouli et al., 2017; Condor, 2011; Gray & Griffin, 2014; Moghaddam, 2008) – contributing to legitimizing the inclusion of certain people from citizenship based on economic value (Mavelli, 2018; Shachar, 2017). How exactly these new priorities are incorporated in the heated “immigration debate” in the Portuguese public sphere (Wills, 2010), i.e., who is the subject of rights as foreign residents, is still unclear.

Moreover, such a programme can be presented as a matter of political choice amongst competing values and goals as part of the “immigration debate” and showing the tensions inherent to this programme; or, instead, they can be normalised as an inevitability requiring no choice, involving only technical decisions (Maesele, 2015; Wood, 2016; Wood & Flinders, 2014) - a straightforward response to ‘the way the world is’ (Castro & Mouro, 2016). This normalisation – a presentation of policies that *depoliticises* them – is an option that can today be often detected in everyday interactions (Maesele & Raeijmaekers, 2020; Wood, 2016; Wood & Flinders, 2014). Such depoliticised discourses legitimize neoliberal laws and policies in ways that render the dimension of political choice invisible (Wood, 2016), offering the public a somehow helpless role (Carvalho, 2008), contributing to closing down the space for possible (political) contestation, collective action or participation. Particularly, the study of depoliticisation focuses on the ways in which communication – for example, in the press – privileges certain voices/perspectives carrying neoliberal values, not showing the contestation of and arguments against current socio-political and economic options. It tends to present issues as technical, in need of technical solutions, thus hindering their (chosen) political/ideological values (Maesele & Raeijmaekers, 2020).

In the current study, we explore how the Portuguese press presents to the public the issues surrounding Chinese residents in Portugal and in relation to the implemented residency by investment law. This will allow to explore whether the deterritorialized and commodified version of citizenship as proposed by this legal innovation impacts the ways in which Chinese residents are presented in the press. Furthermore, this study will explore whether depoliticisation, as a discursive device closing the debate of the neoliberal agenda, is hindering



a more in-depth discussion of who should be granted rights as foreign residents and under what conditions.

## **7.2. Research questions**

Specifically focusing on the Chinese in Portugal, this study examines how the Portuguese press presents a residency-by-investment programme affecting citizenship and foreign residents.

In a first stage, we will explore (1) if Chinese foreign residents are represented in the Portuguese press as a unified community (made of both labour and place-based residents and investment residents), or as a community with two different disconnected sub-groups.

In a second stage, we will analyse (2) how this legal innovation is presented when the Chinese are discussed in the press, and specifically examine whether it is presented in a depoliticised way – i.e., whether the neoliberal values sustaining residency by investment are made invisible and presented as unproblematic – and inside or outside of the “immigration debate”.

We will further examine whether the patterns of these presentations are similar across two widely read but different newspapers, a quality (*Público*) and a tabloid (*Correio da Manhã*) one – since research shows that the pattern of depoliticisation cuts across different types of widely read newspapers (Maesele & Raeijmaekers 2020). In the first stage we will use a text mining software (IraMuTeQ) and in the second, focusing exclusively on the articles mentioning residency by investment, we resort to content analysis.

## **7.3. Method and results**

### **7.3.1. Newspaper selection**

To explore whether the characteristics of depoliticisation are consistently present across the Portuguese press coverage of the Chinese community and Chinese residents by investment, it was necessary to choose widely read papers with different audiences. Thus, the two papers *Público* and *Correio da Manhã* were chosen, as is usual for Portuguese press studies (see Castro et al., 2018). Of the two main daily reference/quality newspapers, *Público* is the one with the largest online readership. From the tabloid/popular press, *Correio da Manhã* is the only daily tabloid available, as well as being the most read Portuguese newspaper (APCT, 2018).

### **7.3.2. First stage**

#### **7.3.2.1 Procedure**

The websites of the two newspapers were searched for the keywords “Chinese” and “Portugal” for collecting articles from January 2000 until September 2017 (the month of data collection); the articles that were explicitly about Chinese residents in Portugal made up the corpus of analysis. This yielded a total of 525 articles (*Público*  $n = 287$  and *Correio da Manhã*  $n = 238$ ) – our unit of analysis – which were then prepared to be submitted to the Reinert Method using the IRaMuTeQ software. The method aims at detecting word clusters (Reinert, 1986) based on the co-occurrence of similar lexical forms (words or multi-words), calculated through consecutive chi-square tests, using a hierarchical descending classification (Rizzoli et al., 2019). The word clusters are then computer-generated on the basis of similar lexical contents. The software also conducts a factorial correspondence analysis that can be graphically depicted, a spatial presentation allowing the analysis of relationships between themes. The overall meaning of each theme results from the words composing it, as interpreted by the researcher. The articles from each newspaper were separately analysed to allow for comparisons between them.

#### **7.3.2.3. Results**

The themes from each newspaper are presented in Table 7.1 along with their five most representative words. A representation of the factorial correspondence analysis of both newspapers – indicating the spatial distribution of the themes according to two axes, defined by their lexical proximity – is presented in Figure 7.1. To explore whether different Chinese themes are connected or disconnected from each other, the proximity of the themes is an indicator (Tuzzi, 2018). The size of the circles demonstrates the dispersion of the theme (see Annex B. original IRaMuTeQ output) and not its predominance.

*Público*'s articles on the Chinese in Portugal are organised in six themes, whereas those of *Correio da Manhã* yielded five themes. Regarding the first research question as to whether the Chinese presence would be represented as a unified community or having two disconnected sub-groups, in both newspapers the pattern of disconnected themes is strikingly similar. The similarities are that the theme “Chinese residents by investment” emerged as separated from all

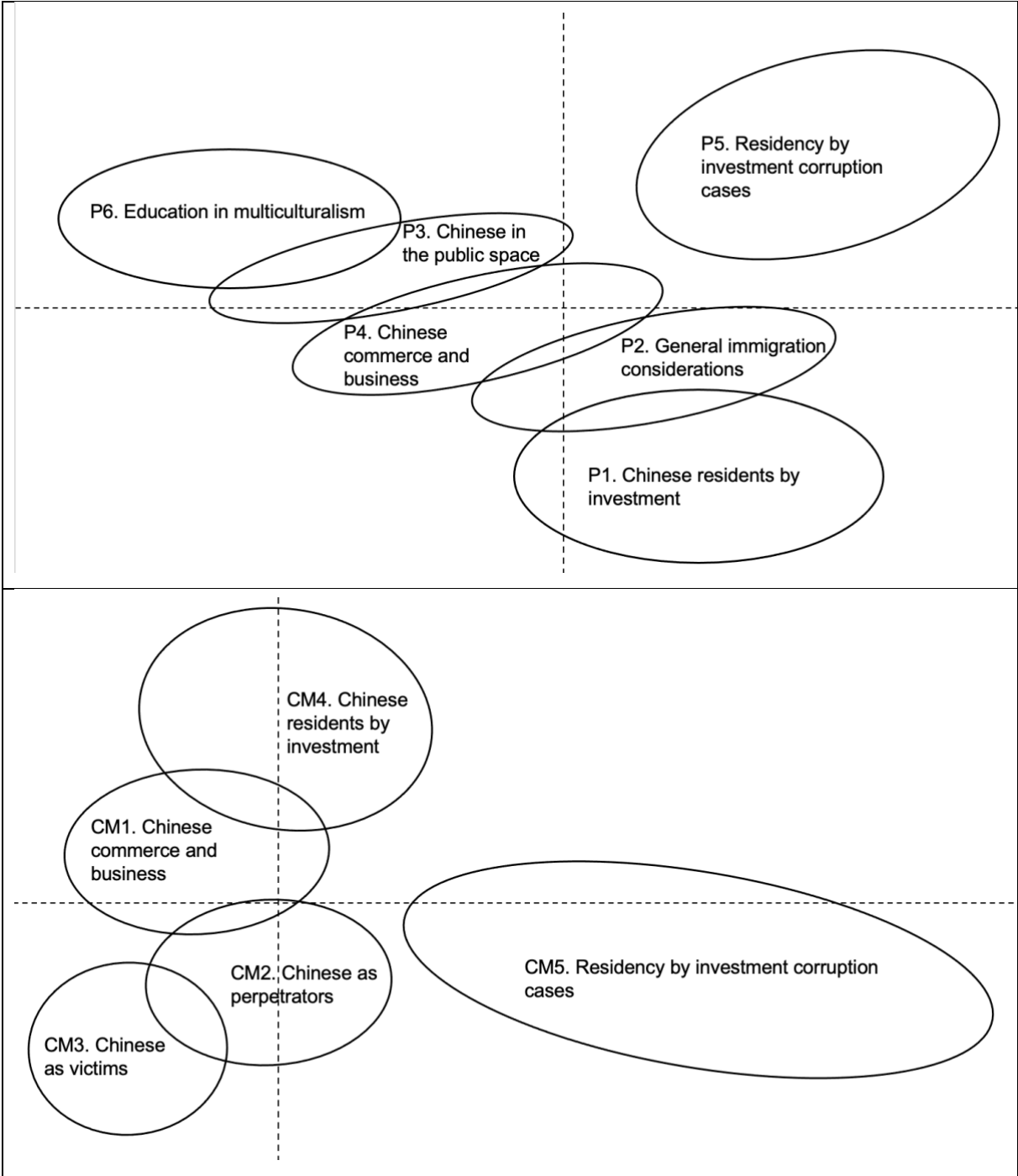
the other Chinese themes, and that there is no proximity to other themes that are linked to the Chinese participation in public life and public places in the country.

**Table 7.1** Themes organising the articles in *Público* and *Correio da Manhã*

Themes	%	Most representative words
<i>Público</i>		
P1. Chinese residents by investment	18.7	investment, real estate, million, euro, property
P2. General immigration considerations	11	foreigner, foreigners and border service, percentage, report, immigrant
P3. Chinese in the public space	19.2	street, <i>Martim Moniz</i> , neighborhood, to live, shop
P4. Chinese commerce and business	20.3	community, president of Chinese commerce, municipality, <i>Varziela/Chinese warehouses</i> , cinema
P5. Residency by investment corruption cases	18.9	accused, <i>Miguel Macedo</i> , <i>António Figueiredo</i> , crime, investigation
P6. Education in multiculturalism	11	school, student, teacher, class, language
<i>Correio da Manhã</i>		
CM1. Chinese commerce and business	25.5	China, Portuguese, to want, prime minister, president of Chinese commerce
CM2. Chinese as perpetrators	12.3	To confiscate, National Guard, food authority, illegal, to detain
CM3. Chinese as victims	28.4	victim, warehouse, robber, robbery, trader
CM4. Chinese residents by investment	21.9	investment, million authorization, percentage, golden visa
CM5. Residency by investment corruption cases	11.8	<i>António Figueiredo</i> , <i>Jarmela Palos</i> , <i>Miguel Macedo</i> , corruption, process

However, there are some differences between the two newspapers in the content of the themes. *Público* has more themes on the visible presence of Chinese in public places, mentioning *Martim Moniz*, a square in Lisbon (P3, 19.2%) where Chinese commerce is very visible, and the educational aspects associated with (Chinese) cultural diversity (P6, 11%). Typical text segments for these two themes, as extracted by the software, are accounts of Chinese activities and celebrations in public places, and, regarding theme P6, on the difficulties felt by Chinese children learning the Portuguese language at school. *Correio da Manhã*, instead, highlights the relationship between institutions of control, such as the police or the health control department and the Chinese, either being perpetrators (CM2, 12.3%) or victims (CM3, 21.9%), also in mostly commerce related issues. Typical text segments of the Chinese as perpetrators report them being caught by the police involved in money laundering or not following food safety regulations in their restaurants. In theme CM3 they are seen as victims of petty crimes, their shops and restaurants being targeted for robbery. This difference between newspapers is in line with their different publishing styles and expected audiences, where one

presents more culture-relevant content (*Público*) and the other focuses on criminal/sensational events (*Correio da Manhã*) (Sparks, 2000). Nevertheless, the pattern of disconnection of residency-by-investment articles from all other Chinese themes is similar in both of these widely read newspapers: both construct the issues surrounding residency by investment as distant from other Chinese issues. This suggests that in reading them, the public is being presented with the existence of two, unrelated, sub-groups of Chinese in Portugal.



**Figure 7.1** Factorial correspondence analysis of themes in *Público* (Pane A) and in *Correio da Manhã* (Pane B)

A further consistent pattern is that the “Chinese residents by investment” and the “Residency by investment corruption cases” themes have similar percentages in the two newspapers, meaning that the level of exposure and discussion of the issue was almost the same in both. Representative text segments for “Residency by investment corruption cases” themes in both newspapers report on a trial in which government officials liaised with real state companies and fostered businesses in exchange for accelerated residency procedures. Yet, corruption problems regarding residency by investment are even more clearly disconnected from the Chinese migration debate in the press. This seems to confirm our second research question, in which we focus on how investment residency may be portrayed as depoliticised and disconnected from the “immigration debate”. This pattern is also clear in both newspapers, suggesting that across the widely read press the strategies used are similar.

However, this analysis does not explicitly present the forms in which the depoliticisation might be present. A more fine-grained analysis is necessary to explore how residency by investment is discussed: particularly, to explore the characteristics of discourse that may have contributed to a depoliticised representation of the issue; also, to uncover how this depoliticisation may affect representations of citizenship, and of the Chinese residents along with it.

### **7.3.3. Second stage**

#### **7.3.3.1. Content analysis**

As mentioned, in the second stage, the goal is to uncover whether Chinese residents by investment are discussed in the press in a depoliticised way using content analysis. We now describe the analytic procedure.

The first step was to select articles from the previous corpus that directly mentioned residency by investment. These were 83 articles in *Público* and 81 in *Correio da Manhã*, making for a total of 164 articles from January 2013 until September 2017.

Then a content analysis was conducted to explore depoliticisation. Drawing from the framework for the analysis of depoliticisation in the press (see Maesele & Raeijmaekers, 2020), it was defined that depoliticisation could be detected in both *structure* and *content* categories. Regarding structure, depoliticisation would be present if articles were short, few were of opinion, and there would be a predominance of articles highlighting the benefits of the law. Depoliticisation would systematically show only one (homogeneous) perspective about

residency by investment and their underlying neoliberal values. Articles would also exclude several relevant social actors. Regarding content, articles would be predominately composed by arguments in favour of residency by investment using economic values rather than citizenship ones. Economic values should draw on (neoliberal) economic and property values for capital accumulation and/or production (Comaroff & Comaroff, 2001), whereas citizenship values would put forward a discussion on the non-permanence proposal of residency by investment and how it may contrast with (traditional) labour and place-based citizenship and participation values (Langhout & Fernández, 2018). A very high predominance of economic values was considered as an indicator of depoliticisation. The steps for the content analysis (Lacy et al., 2015) were the following.

First, the structural categories were created following the methodological procedure of Castro and colleagues (2018). Categories were discussed between the first two authors until their definitions were stabilised and only then would analysis proceed to the whole corpus. The structure categories created were: *length of article* (short to medium vs. long); *depth of article* (opinion vs. news/reportage); *orientation related to residency by investment* (balanced, predominance of benefits, predominance of problems, and descriptive); *range of perspectives* (homogeneous or heterogeneous); *voice* (not mentioned vs. mentioned/directly quoted by: (a) the government institutions/actors; (b) real estate; (c) investment residents; (d) Chinese institutions; (e) other non-investment migrants; (f) other citizens, e.g., local citizens).

Second, the content categories were created by the two first authors by screening the articles for arguments that used different types of values to justify the societal relevance of residency by investment. Arguments were defined as extracts of articles that either implicitly or explicitly give reasons for or against residency by investment. The content categories created were the following: (1) *arguments using economic values in favour of residency by investment*; (2) *arguments using economic values against residency by investment* (3) *arguments using citizenship values in favour of residency by investment* and (4) *arguments using citizenship values against residency by investment*.

Third, each of the four types of arguments were further divided in specific data-driven sub-categories (see Annex C for frequencies). These were categorized for a more detailed analysis of the composition of these arguments and whether these contributed to a plural – politicised – debate within the tensions in economics and in citizenship/migration.

Fourth, as recommended by best practices in content analysis (Lacy et al., 2015), an external evaluator performed a random codification of 20% of articles to evaluate inter-rater reliability of the coding. The mean of Cohen's Kappa was .954 (see Table 7.3).

### 7.3.3.2. Results

Regarding whether investment residency is presented in a depoliticised way, structure categories seem to support this claim. In both newspapers, the majority of the articles were of short to medium length (130 articles, 79.1%) and there was a high prevalence of descriptive news (154 articles, 93.9%), with very few opinion articles (10 articles, 6.1%).

**Table 7. 2** *Frequencies and chi-square test of structure categories by type of press*

Structure Categories		<i>Público</i>	<i>Correio da Manhã</i>	Total (%)
Length*	Short/Medium	60 (-)	70 (+)	130 (79.1)
	Long	23(+)	11(-)	34 (20.7)
Depth	Opinion	3	7	10 (6.1)
	News/Reportage	80	74	154 (93.9)
Residency by investment orientation*	Balanced	20	29	49 (29.9)
	Benefits	46	35	81 (49.4)
	Problems	6 (-)	14 (+)	20 (12.2)
	Descriptive	11 (+)	3 (-)	14 (8.5)
Range of perspectives*	Homogeneous	64 (-)	74 (+)	138 (84.1)
	Heterogeneous	19 (+)	7 (-)	26 (15.9)
Voice				
Government	Not mentioned	19	10	29 (17.7)
	Mentioned/Quoted	64	71	135 (82.3)
Residents by investment	Not mentioned	59	46	105 (64.0)
	Mentioned/Quoted	24	35	59 (36.0)
Real estate*	Not mentioned	44 (-)	65 (+)	109 (66.5)
	Mentioned/Quoted	39 (+)	16 (-)	55 (33.5)
Chinese institutions	Not mentioned	74	72	146 (89.0)
	Mentioned/Quoted	9	9	18 (11.0)
Other migrants	Not mentioned	81	80	161 (98.2)
	Mentioned/Quoted	2	1	3 (1.8)
Other citizens	Not mentioned	80	81	161 (98.2)
	Mentioned/Quoted	3		3 (1.8)
Total		83	81	164

*Note.* \* $p < .05$ . Valence of adjusted standardized residuals in parenthesis beside frequencies.

Most articles highlighted the benefits of residency by investment (81 articles, 49.4%) and only a small percentage of articles discussed their problems (20 articles, 12.2%). Also, most articles showed a homogeneous perspective on the matter (138 articles, 84.1%), i.e., in each article, only one perspective was presented. These structural characteristics of the corpus signal

an unbalanced way of discussing investment residency-related issues in the press. It presents only one perspective – that of the benefits it brings – with little depth or complexity.

Regarding whose voices the press might be favouring, governmental institutions and actors were the most mentioned/quoted actors in these articles (135 articles, 82,3%), followed by residents by investment (59 articles, 36.0%) and real estate representatives (55 articles, 33.5%). Other social actors who could have contributed to a more pluralistic debate on the consequences of residency by investment were practically absent. These are: local Chinese institutions (not mentioned, 89.0%), other non-investment migrants (not mentioned, 98.2%) and other local citizens (not mentioned, 98.2%). To clarify whether the two newspapers present differences between them in the structural categories, chi-square tests were performed (see Table 7.2). Results show differences in length,  $\chi^2(1) = 4,981, p = .02$ , in the orientation of residency by investment,  $\chi^2(3) = 10,896, p = .01$ , in the range of perspectives,  $\chi^2(1) = 6,240, p = .01$ , and in the presence of real estate as a social actor,  $\chi^2(1) = 13,642, p = .00$ . However, despite these few differences, the overall pattern remains similar – and points to depoliticisation of the issue. This corroborates the literature indicating that this coverage strategy may be applied in all types of widely read press.

Regarding the content categories (see Table 7.3), the number of articles including *arguments using economic values in favour of residency by investment* is striking (85 articles, 51.8%) compared to other types of arguments, and, particularly, contrasting with the number of articles having *arguments using economic values against residency by investment* (2 articles, 1.2%). The low number of articles that argue about residency by investment through citizenship values (4 articles in favour, 2.4%, 13 articles against, 7.9%) seems to suggest this legal innovation is seldom discussed via the “immigration debate” (Wills, 2010), i.e., through the articulation of residency rights. Comparisons between newspapers revealed significant differences only regarding arguments with economic values in favour of residency by investment,  $\chi^2(1) = 7,882, p = .005$ ). According to the previous step of analysis, part of our corpus describes corruption events (see Table 7.1), still, contestation against residency by investment as a legal mechanism is scarce. Not showing different views on these (neoliberal) innovations to citizenship, nor on valid contestation beyond neoliberal/economic values, creates the conditions to close down the debate on the matter (Maesele & Raeijmaekers, 2020).



**Table 7.3** *Frequencies and chi-square test of articles with arguments using economic or citizenship values in favour of or against residency by investment, by type of press, and kappa of random 20% selection of the corpus*

Types of arguments	<i>Público</i>	<i>Correio da Manhã</i>	Kappa	Total (%)
<b>Economic</b>				
in favour*	52 (62.7%)(+)	33(40.7%)(-)	.864	85 (51.8)
against	-	2 (2.5%)	-	2 (1.2)
<b>Citizenship</b>				
in favour	2 (2.4%)	2 (2.5%)	1.00	4 (2.4)
against	9 (10.8%)	4 (4.9%)	1.00	13 (7.9)
Total	63 (75.9%)/83	41 (50.6%)/81	33 (20%)/164	104 (63.4)/164

*Note.* \* $p < .05$ . Valence of adjusted standardized residuals in parenthesis beside frequencies.

*Arguments using economic values in favour of residency by investment* (222 arguments, 87.1%) are overwhelmingly more numerous (see Annex C). This evidence, in combination with other structural categories in which a homogeneous and positive perspective are the major tendency, suggests that the press is showing the citizenship-by-investment law very positively and as bringing only benefits to the economy. Depoliticisation is done by the emphasis on how residency by investment bring “large sums of money to Portugal”, i.e., stating, very generally, that the benefits are for all (i.e., the whole country). In one example in particular (see Table 7.4), it is mentioned how this money coming from the residency by investment law is directly entering the Portuguese “*vaults*”. Who has these “*vaults*”, and who benefits from them, however, remains undiscussed – particularly striking considering that this investment is mostly channelled into real estate, even though other possibilities of investment are available – in urban rehabilitation, job creation, or in cultural and research activities (Ampudia de Haro & Gaspar, 2020).

This law was implemented during the financial crisis in Portugal and the consequent bailout and austerity program, during which technical/economic solutions were systematically presented as highly desirable, and, in fact, as the only possibility for leaving the crisis (e.g., Figueiras & Ribeiro, 2013; Moury & Standring, 2017). So, in this coverage again, overall, foreign investment is presented to the public sphere as an inevitable technical solution to the difficult times the country and the economy were going through, by mentioning the potential for economic growth, job creation and other economic advantages – although it is left rather vague who the exact beneficiaries are (Maesele & Raeijmaekers, 2020). In this vein, government social actors for instance claim in the articles that it would be “*an insanity to refuse foreign investment*” (see Table 7.4). Also, arguments using economic values to contest the

residency by investment regime are low (3 arguments; 1.2%). This shows how economic contestation, i.e., contestation to the neoliberal logic of the market, is absent. Apart from one extract – from one opinion article – that argues for the change of the “*economic paradigm*” (Table 7.4) – no contestation is given to the neoliberal proposals of this residency by investment programme.

Arguments using *citizenship values* to either sustain (9 arguments; 3.5%) or contest (21 arguments; 9.4%) residency by investment are not frequent. In those arguments, real estate representatives highlight the deterritorialised proposal of the law as something positive: e.g., because it allows free movement in Europe/World; because *investors* show no desire for an attachment in the host country. In some arguments, this defence of the deterritorialised vision of citizenship supported by the law co-exists, however, with the expectation that new residents are looking for a “*high quality of life*” (Table 7.4) (Studemeyer, 2015). Scarce as it is, this type of positive argument puts forward new representations of citizenship, migration and residency without making evident the tension with previous “traditional” citizenship representations. They present the new residents by investment as people who do not work (in Portugal) and do not need to attach to community or place as other forms of residency require.

This is in contrast with arguments *against* residency by investment using citizenship values. These arguments show some contestation, by negatively referring to waivers in the residency by investment application process (e.g., no Portuguese language requirement). They also mention how it may allow the entrance of dishonest people into the territory and highlight the potential for corruption inside the state institutions.

Again, although there is almost no contestation, the available contestation does not discuss in depth (1) how new legal proposals affect different groups of foreign residents, (2) how place-based citizenship is being challenged by the commodification of citizenship and (3) (other) citizenship possibilities/values beyond neoliberal values.

**Table 7.4** *Examples of arguments using citizenship and economic values in favour of or against residency by investment*

Arguments using economic values		Arguments using citizenship values	
In favour of residency by investment	Against residency by investment	In favour of residency by investment	Against residency by investment
<i>The Golden Visa program has already conferred 817 million euros to the state vaults. The initiative was created in October 2012 in order to attract foreign investors. Since then, 1360 golden visas have been issued to foreign entrepreneurs who have created job opportunities in Portugal or invested more than half a million euros in the country.</i>	<i>And suddenly Portugal started issuing visas to promote solely two sectors: Real estate and banking and a group of rascals in ties strategically placed in the state apparatus.</i>	<i>The entrepreneur admits that Chinese clients have but one goal, which is to "obtain a visa so as to be granted freedom of movement in Europe." - some of his clients had never heard of Portugal before. Despite not being interested in staying permanently in Portugal, this does not mean that investors do not want the required investment to be profitable.</i>	<i>Whilst in the past, citizenship was fiercely fought for, nowadays it is given in return for temporary investment in real estate. Portuguese language tests are no longer required, issues of security and prestige are no longer taken into consideration - open doors, letting swindlers in. Is that "golden"?</i>
<i>Portugal issued 471 Golden Visas in 2013 and earned 306.7 million in investments. The expected growth is, for the vice Prime-Minister, the confirmation that 'Golden Visas are a tool for economic recovery as well as that of the Real Estate market', as explained to Lusa (news agency).</i>	<i>The millions that entered the country were almost exclusively invested in real estate, which has largely contributed to the economic crisis. That is why property owners are given advantage, particularly by banks cramped with repossessed buildings which would lose even more of its value, were it not for the extra help. Investors did not show any interest in areas which would help us change the economic "paradigm", such as the export sector.</i>	<i>Portugal's requirement that the investor remains in the country, for 14 days every two subsequent years "does not affect the investor's life in his home country (China)."</i>	<i>Surely, there will always be rascals taking advantage of this citizenship auction as a means of laundering their money, corrupting civil servants, deceiving the state and so on and so forth.</i>
<i>We are willing to improve the system, we want Portugal to have a system "that contributes to economic growth", highlighted the vice Prime-Minister. In his first intervention, Portas said that "it would be an insanity to refuse foreign investment"</i>	<i>Golden investors are not the least bit interested in the Portuguese economy. Their two concerns are: money laundering and the European economy, since a visa issued in Portugal opens doors to the EU, thanks to the freedom of movement allowed within its borders</i>	<i>And these, clearly, are "touristic destinations known worldwide with plenty of beautiful landscapes and a paradisiacal coast where rich citizens can enjoy a high quality of life.</i>	<i>The socialist member of the European parliament Ana Gomes does not seem surprised (...). "I got sick and tired of warning people that this was bound to happen. It is a scheme that lends itself to all manners of corruption, starting at the bottom and going all the way to the top of the administrative hierarchy, as well as facilitating money laundry.</i>

## 7.4. Concluding remarks

This study seeks to understand how the Portuguese press communicates to the public sphere a particular market-conforming policy through which the state redraws the meanings of citizenship (Wacquant, 2012). For this, it focused on a group of foreign residents in Portugal, the Chinese, a rapidly growing group and the major beneficiaries of residency by investment, a neoliberal policy for foreign residency in the country. It sought to uncover whether the press presented the Chinese residents as a unified community, or if the residents by investment come out as a different sub-group; and whether this presentation was a depoliticised one.

Results show that the two widely read tabloid and quality newspapers studied yielded very similar patterns. Both present and discuss residents that are in the country through traditional means of labour and place-bound integration separately from those who are residents by investment. This means that, to the readers, two separate sub-groups of foreign residents come out. Following a more fine-grained analysis of the articles only mentioning residency by investment, it was possible to unveil in them the characteristics of a depoliticised discourse. Specifically, the systematic prevalence of short, descriptive – rather than analytic/opinion – articles, the predominance of homogeneous articles highlighting only residency by investment’s benefits, with no contrary views, and the overall presence of arguments with economic reasons for the investment to be inevitably *good* rendered both the existence of choice among competing values and contestation *not* visible. The prevalence of short and descriptive articles could also point to the diffusion mode of communication, in which the goal is to provide unaffected/generalist information. The voices – and thus the perspectives – were, nevertheless, of the governmental institutions were much privileged and highlighted. This is aligned with previous claims that the widely read press often contributes to serve as “agents of establishment ideas and elite voices” (Maesele & Ræijmaekers, 2020, p. 1593).

The contributions of this study are two-fold: theoretical and applied. Theoretically, it contributes to social psychological studies of citizenship and of legal innovation. This is done by focusing on neoliberal legal innovations directly affecting citizenship, which incorporate and legitimise certain values and representations of the common good (Castro, 2012), and by analysing how these are reflected or suppressed in the press. Extending existing research, we thus explored the link between the macro-level of legal representations of citizenship and the micro-level of everyday meaning-making (Andreouli et al., 2017; Batel & Castro, 2018; Castro, 2012; Castro & Santos, 2020; Howarth et al., 2013; Mahendran et al., 2019) for a better

understanding of citizenship under neoliberal rules. Specifically, we explored how a legal innovation regarding citizenship and migration, informed by economic values, was discursively presented in the press – and helped shape everyday debates and representations of citizenship and migration. The tensions and contrasting views that could arise from the economic priority offered to capital over labour (Comaroff & Comaroff, 2001), and the dismissal of a place-based involvement in the country (Tanasoca, 2016) were, however, absent. The depoliticisation of residency by investment also presents them to the public as economic/development policies, rather than migration and citizenship ones – leaving them outside the much more complex and contested “immigration debate” (Wills, 2010). This emphasizes how the press is contributing to how socially shared meaning – in interaction with neoliberal proposals – is actively constructing *who* constitutes an *immigrant* and in *what* conditions. The findings pose interesting questions to migration studies, challenging it to examine how globalization and transnational movements (regulated by new laws) affect who is perceived as an immigrant and the relations between inter-minority and intra-minority groups in host societies (Ong, 1999; Verkuyten, 2018). Also, we show how the press plays an important role in creating limits for the meaning-making processes related to new (neoliberal) laws.

Indeed, this study shows how the widely read press is not assuring the space for plural debates about citizenship and migration, by portraying *the* neoliberal perspective as unique and undebatable (Maesele & Raeijmaekers, 2017). If the press does not present the range and complexity of political contestation to economic and political options, and its alternatives, citizens have limited access to other (political) configurations and options. This invisibility of other political options may help feed the lack of citizenship engagement – and the ‘learned helplessness’ assumption from the polity that policy is, in fact, only a matter of ‘expertise’ (Hay, 2014). The press may play an important role in rendering certain issues as inside the plural, political debate, or rather, presenting it *outside* the realm of citizenship, and, consequently, belonging to the realm of technocratic considerations.

Future research can examine the effect of depoliticised debates in citizenship engagement for social change (Carvalho, 2008) – specifically as a pre-condition for politicised identities necessary for collective action (e.g., Simon & Klandermans, 2001; von Zomeren, et al., 2008). The ways in which the press maintains the hegemonic representation of certain political (neoliberal) configurations should be explored further – how it happens in the newsroom where press material is produced, thus exploring what factors may lead towards a politicised press or a depoliticised one.

Finally, this study contributes to the literature by putting forward a framework to analyse how (neoliberal) legal changes regulating migration may not be presented to the public as proposals following from options among competing values, but as technocratic decisions, thus limiting possible debate beyond neoliberal values.

## Study 3 – Everyday citizenship in context of the residency-by-investment law: claiming mobility and residency rights<sup>5</sup>

### 8.1. Introduction

As state policies and citizenship regimes help shape citizenship representations (e.g. the press, the previous Chapter 7), it is still unclear how foreign residents navigate and make-sense of them as everyday citizenship (Ellis & Bhatia, 2019). This is especially relevant when state policies contribute to deepening inequalities in mobility access and within a foreign community (Amante & Rodrigues, 2020). The is the case of the residency-by-investment implemented in Portugal in 2012, commodifying foreign residency rights and exempting its beneficiaries of long-term permanence requirements. Residency rights are granted in exchange of a considerable amount of investment that were usually made in real estate (although other options were possible, see Chapter 4 for more information). The study of everyday meaning-making is thus necessary to unveil the tensions and struggles that has led to the acceptance/resistance of such legal innovation (Castro, 2012).

Because of these characteristics, this programme made the search for “flexible citizenship” (Ong, 1999) and “instrumental citizenship” (Joppke, 2019) more easily accessible, particularly, for the wealthier Chinese, the largest group of beneficiaries. Indeed, research on the Portuguese context has already highlighted the transformations in the Chinese migration profile to Portugal since its implementation (Gaspar & Ampudia de Haro, 2020; Ampudia de Haro & Gaspar, 2019). A new group of Chinese residents arrived in the country, significantly increasing the number of Chinese residents in Portugal. During a particular challenging time of the economic crisis, Chinese residents and descendants could also venture in new and profitable businesses (e.g. creation of real estate agencies), making them important promoters of the programme (Amante & Rodrigues, 2020; Gaspar, 2017). Contrarily to the “flexible citizenship” approach in which mobility should serve capital accumulation only (Ong, 1999), Chinese beneficiaries are using this mechanism for better living conditions, healthier and less polluted environments, less competitive educational systems, and are looking to provide their children with a more

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<sup>5</sup> A version of this study is in preparation to be soon submitted: Santos, T. R., Castro, P., & Andreouli, E., (in preparation). Everyday citizenship by Chinese *Golden Visa* holders in Portugal.

relaxed lifestyle (Liu-Farrer, 2016; Studemeyer, 2015). So, if on the one hand there are beneficiaries interested in investment and mobility, so to accompany the logics of the global market, others are claiming rights of residency and permanence to enjoy a healthier life (Nyíri & Beck, 2020). This programme of commodification of residency and mobility rights are currently used to fulfil different needs, as seen in different countries where this programme has been implemented (Liu- Farrer, 2016; Nyíri & Beck, 2020).

Policies with such citizenship proposals are often understood to be the product of globalization and of cosmopolitan identities (Calhoun, 2002). However, more often globalization is presented within its advantages for global identities, leaving the inequalities inherent to this unequal access to mobility undiscussed (Carolissen, 2012; Prilleltensky, 2012). Cosmopolitanism, for instance, can contribute to a discourse of mobility privileges that nevertheless are reserved to frequent travellers, whereas other migrants are being criticized to pursue it (Bhatia, 2008; Calhoun, 2002). The *inevitability* of globalization and the dynamics of the global markets help support these transformations and inequalities (Massey, 2005; Ong, 2006). Through this process of legitimation, the result is the concealment and/or delegitimization of other types of citizenship representations, making these (neoliberal) representations of citizenship the expected norm (Ong, 2006). Particularly relevant to this case, is how these claims are oriented to articulate the interconnected domains of permanence/stability and mobility (Di Masso, et al., 2019) that is only made possible because such a legal framework emphasizes the interrelated relationship between citizenship, capital and mobility as an exclusive configuration for a few (Mitchel, 2016).

Furthermore, the commodification of residency and mobility rights, forces to enquire whether the discursive formats and constructions of neoliberalism are in any way participating in the construction of citizenship. Everyday thinking, as social representations (Moscovici, 1972), or everyday meaning-making (Billig, et al., 1988) reflect the tensions that are making certain configurations of citizenship more prominent than others. We can speak of hegemonic social representations when certain ideas are coercive, offering little space for alternative representations (Moscovici, 1988; Negura et al., 2020).

Neoliberalism could be considered as a coercive set of assumptions of the economization of everyday life, as part of neoliberal common-sense (Hall & O'Shea, 2013). It is not, however, necessarily widely shared. Social representations are 'living' systems of knowledge (Howarth, 2002, 2006b) and, thus, neoliberalism – and the citizenship representations accompanying it - is not a closed, internally coherent system, but it may take many (unexpected) forms and shapes,



full of tensions and struggles. China is one example, where Confucianism, post-Maoism, authoritarianism and neoliberalism go hand in hand (Brown, 2016; Ong, 2007).

This study then proposes to explore whether neoliberalism, as a cultural resource, participates in the construction and re-articulation of citizenship – as foreign residency rights - by Chinese residents and in context of the residency-by-investment programme. Particularly, this study analyses (1) how the implemented proposals of citizenship by the investment programme - as based on assumptions of the neoliberal citizenship (Brown, 2015; Ong, 2006), emphasizing foreign resident's investment capacity and easier access to mobility – are made sense of in everyday life, and whether it is dividing a community of foreign residents; (2) whether and how mobility and/or residency claims are being advanced according to views of cosmopolitanism and (3) whether these claims are subject of discursive devices and configurations that are hindering other citizenship configurations and alternatives.

## **8.2. Sample and analytical procedure**

Interviews were conducted from March 2018 until March 2020 with Chinese residents in Portugal, some were already naturalized Portuguese citizens of Chinese origin (total n=25). A part of this group was investment residents (n=11). Other participants were key-informants (n=14) because they had insider knowledge of the residency-by-investment programme as they worked in companies that help manage their application and other everyday affairs, such as lawyers, interpreters, or Portuguese teachers. Recruitment followed snowball sampling, as each interviewee recommended one or two potential interviewees. Overall, the sample is heterogenous in terms of age (mean= 40, min. 23 and max. 68) (see Table 8.1<sup>6</sup>).

Residents by investment arrived from cities of higher economic and social development in mainland China such as Beijing, Shanghai or Hangzhou to Portugal from 2014 onwards. The non-investment group have more dispersed dates of arrival. There were long-term residents and some newly arrived students of translation and interpretation of Portuguese. Most were from mainland China, including from the province of Zhejiang where most Chinese migrants in Portugal are from, except from two participants that are from the Special Administrative Region of Macau.

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<sup>6</sup> The table has limited information (omitting gender, city of origin or occupation) so to keep the participants anonymous.

**Table 8.1** *Sample characteristics*

<b>ID</b>	<b>Age</b>	<b>Year of Arrival</b>	<b>Current Status</b>
I1*	46	2018	Resident by Investment
I2*	48	2018	Resident by Investment
I3	23	2013	Resident by Investment
I4	46	2017	Resident by Investment
I5	28	2015	Resident by Investment
I6	28	2016	Resident by Investment
I7	30	2016	Resident by Investment
I8	53	2018	Resident by Investment
I9	42	2018	Resident by Investment
I10	56	2014	Resident by Investment
I11	52	2014	Resident by Investment
I12	32	2005	Portuguese Nationality
I13	32	2016	Temporary Resident
I14	32	2010	Portuguese Nationality
I15	24	2017	Temporary Resident
I16	27	2015	Temporary Resident
I17	68	1987	Portuguese Nationality
I18	25	2014	Temporary Resident
I19	46	2004	Permanent Resident
I20	37	1992	Portuguese Nationality
I21	50	2005	Permanent Resident
I22	63	1962	Portuguese Nationality
I23	45	1982	Portuguese Nationality
I24	29	2006	Portuguese Nationality
I25	35	2018	Permanent Resident

Note. \*I1 and I2 participated in the same interview

The main researcher, a white female Portuguese researcher with intermediate knowledge of Chinese Mandarin, conducted all the interviews in Portuguese and English, but Chinese Mandarin expressions and concepts were encouraged. When interviewees required the entire interview to be in Chinese Mandarin an interpreter was requested to be present. The interview guide encouraged participants' narratives, motives and understandings of migration and mobility starting from more personal experiences to broader understandings of Chinese mobility in the world. Interviews were recorded with the interviewees' consent, granting confidentiality, and transcribed *verbatim* (see Annex D. informed consent and interview guide

in Portuguese and English). In the case of the interviews in Chinese Mandarin, a professional translator transcribed and translated them.

The analysis first followed a thematic analysis to locate comprehensive themes across all interviews (Batel & Castro, 2018; Braun & Clarke, 2006;). Extracts were coded according to the main research question of how investment residency was informing the interviewees views and understanding of (neoliberal) citizenship manifested in claiming foreign residency rights. Specifically, it explored (1) how different groups inside the community were constructed and made sense of, (2) what citizenship representations were being advanced and (3) the role of neoliberalism - as a cultural resource - in articulating these accounts.

Three interrelated themes were identified to answer each one of the proposed questions (see Table 8.2). The first theme regards the differentiation of a new Chinese mobility in comparison with an old form of mobility within different domains. The second theme regards the strategic and interdependent use of residency and mobility in configuring cosmopolitan citizenship. The third theme encapsulates the accounts of geopolitics and the global flows of capital within an increasingly globalizing world, helping to articulate current views of citizenship. The three themes are present in most of the interviews. Specifically, theme one is present in 21 interviews, theme two in 23 interviews and theme three in 20 interviews out of a total of 25 interviews (see Table 8.2 for more details).

Following the thematic analysis, we conducted a pragmatic discourse analysis (Batel & Castro, 2018;) to combine the study of content with its discursive formats and processes. After a thematic overview offering content, we explored how the themes are argued upon, and how the discursive strategies were making up hegemonic social representations. These are discursive strategies not accommodating counter themes, or “conflicting tropes” (Batel & Castro, 2018; Billig, 1988; Castro, 2015). Often the analysis of what is *not* said and how, is as important as what it is said and discussed. It is “in what is left unsaid that we can diagnose the operations of power”, of how certain ideas are kept stable and taken for granted (Batel & Castro, 2018, p.740; Billig, 2006). Also, by analysing discourse, it is possible to look at the interactional processes of the interview, and to explore issues of stake and accountability (Potter, 1996) and to contextualize them in these wider struggles/dilemmas in the interplay of themes and counter-themes (Andreouli & Nicholson, 2018).

**Table 8.2** *Themes and codes of the analysis and participant frequencies*

<b>Themes</b>	<b>Codes</b>	<b>Participants</b>
(1) Differentiating a new migration	In relation to: <ul style="list-style-type: none"><li>- different migration strategies</li><li>- higher education/socio-economic status</li><li>- interaction/lack of interaction inside the community</li></ul>	I1+I2; I3; I4; I5; I6; I7; I8; I9; I10; I11; I12; I15; I17; I18; I19; I20; I21; I22; I23; I24; I25
(2) Mobility and cosmopolitan citizenship	Incorporating mobility in the everyday experience of citizenship: <ul style="list-style-type: none"><li>- to search for international lifestyles</li><li>- to search tranquillity and relaxation</li><li>- as strategies for passport acquisition</li></ul>	I1+I2; I3; I4; I5; I6; I7; I8; I9; I10; I11; I12; I13; I14; I15; I16; I18; I19; I20; I21; I22; I23; I24; I25;
(3) Narrative of global development	<ul style="list-style-type: none"><li>- the construction of the East-West divide</li><li>- China's position in the global market</li></ul>	I1+I2; I3; I4; I5; I6; I7; I8; I9; I10; I12; I14; I15; I17; I18; I19; I20; I21; I22; I23; I25

### 8.3. Analysis

#### 8.3.1. Theme 1 - Differentiating the new migration: *We didn't come to earn money; we came because we like it here*

The residency-by-investment allowed for a “new” Chinese migration to Portugal. This new mobility was presented in the data as seeking different goals from the migrants of the past. Investment, economic stability, Western education, and better environment were cited reasons, like research on the new migration in different countries has shown (Liu-Farrer, 2016; Nyíri & Beck, 2020). This first theme highlights the basis of differentiation as described by the participants. The division between the educated and the economic migrant was frequently mentioned to justify the new wave of migration (Ho & Kathiravelu, 2021).

##### Extract 1

*But it's very different, nowadays we have a degree, we are students, or we are... They [residents by investment] already were professionals in China and decided to change their lives, it was a personal choice, it was a choice they made 'I am leaving, I will choose it here because of this and this'. The ones who came for instance, in the 90's, it wasn't a*

*choice, it was like... they had to leave, they left and fell here, others fell in Italy, others went to France. (I21, key-informant)*

In extract 1, the differences between groups are presented as a matter of agency and will. The migrants of the past were “forced” to leave the country of origin and would “fall” in any given country. The migrants of the present are educated and more available to choose where they want to go. The new forms of migration, in which this participant is also including themselves, are of qualified people (*nowadays we have a degree*). In this extract, the differentiation between the categories created by the law was being reduced between the investment residents and other residents by reinforcing how those other qualified migrants (not necessarily investment residents) were also part of a “new” mobility (*we have a degree, we are students... they were already professionals*).

Furthermore, common in these interviews was the temporal dimension to explain the differentiation between newer (in which professionals and investors are part of) and older forms of migration (Ho & Kathiravelu, 2021). There is a past, when Chinese economic migrants were forced to leave China and a present where new, educated, migrants are settling because they *choose* to, illustrating how education and capital can contribute to freedom and opportunity (Chun, 2017). Indeed, the emphasis on the educated subjects may allude to the promotion, especially in Asia, “of educated and self-managing workers” (Ong, 2007, p. 6) who are competing and responding to the dynamics of the global knowledge markets.

In the Portuguese context, the category of the new – educated – mobility was named “new migrant/migration” (*xinyimin*) by participants and was reserved for the residents by investment. The act of naming serves to create boundaries within the group of Chinese migrants and highlight their differences (Lu & Wu, 2017). It may also serve as category entitlement (Potter, 1996), i.e., reinforcing one’s category to justify and legitimize a particular type of knowledge/experience, as extract 2 shows (*we are called the new migrants*). This is a common descriptor also found in research with the Chinese community in other countries (Ho & Kathiravelu, 2021; Liu-Farrer, 2016;).

#### Extract 2

*the way of living the way of doing things, we are... a little bit different, so during that time they are always working, earn money, and for the... we[are] call[ed] the new migrants, from China, it's like... because there's the golden visa, the golden visa scheme has a relatively higher economy, stability. Specially for us, we live here, so that's... needs to say*

[needs to be said], *we don't need that much work here. Because, it is not easy... for them... you have to work. So... typically, they are working in a restaurant, in a... a Chinese shops, they have limited connection with like, art, artists, other circles... when we arrived, it's a... kind of different, we try to reach out, for the... for the normal Portuguese people, to, to... to talk with them, to be friends with them, and then, we can... discover more, not, not... like, the older generation, they are always working, even if we have many good friends of... the... the old migrants, they still have to work a lot, so.. because of the connection in the artist's circle, you have to... you have to...to spend time with them.* (I11, resident by investment)

The colloquial term “*golden visa*” was used by most interviewees, like in extract 2. The programme is presented as bringing people with higher economic possibilities into the country. According to the account presented in this extract, these are people that have the availability to learn about the culture and engage with its people, as they do not need to work. Since the Portuguese public sphere extensively assumed (e.g. the press) that these investment residents did not want to stay in the country long-term (Santos et al., 2020), this extract can be understood to dismiss any assumptions that these residents may not be involved with the everyday affairs and are actively participating (*Specially for us, we live here*). The clause “needs to be said”, in this extract, is used to re-affirm this point. Emphasis is given as to how they are -contrary to other *golden visas* that decide to not stay *and* previous generations - committed to getting involved with the local community. Previous generations of migrants are presented in this extract as having no time to get involved with the local community, given their workload and attempts to gain a living. It foregrounds a difference in socio-economic status, especially noticeable with the reference to the artists' circle and investment residents' availability and capacity to get involved with the elites. These differences are not only presented in terms of social background but in terms of the integration strategies pursued (Ho & Kathiravelu, 2021; Lu & Wu, 2017).

Although the differences between groups were emphasized, there were claims for relationships between them. Older generations and other residents were key informants for the newcomers (Ho & Kathiravelu, 2021; Zhou & Liu, 2016). The mobilization of social capital – also following cultural logics of *guanxi* (Ong, 1999), i.e., networks of relationships that are driven by moral obligation and exchange – was necessary for the popularity of the residency by investment programme in Portugal (Amante & Rodrigues, 2021). Given the lack of English and Portuguese proficiency of many of the residency-by-investment applicants, older

generations helped with the bureaucratic arrangements in buying a house or pursuing the investment – important intermediaries in connecting global lifestyles with local configurations (Ho & Kathiravelu, 2021; Ong, 1999; Zhou & Liu, 2016).

### Extract 3

*[A golden visa] accompanies the child because the child wants to study here. Either in a Portuguese school, or in an international school. And the father still works in China and only comes to spend vacations. Only Chinese parents do this. It's hard, it ain't easy, right. The parents sacrifice so much for their children. The parents are apart, and some issues arise. It's true. But it's because of the children, the Chinese invest a lot in their children's education. They, my clients, as a matter a fact, they like it a lot, they've heard, they enjoy it a lot, to live here. They like... they think the Portuguese people are friendly, available to help. They feel very good. They are also integrated. They learn, the parents, they also learn Portuguese. They make an effort because they want, when the five years come up, they want to ask for the 5 year permanent residency and one of the conditions is to have certificate level A2. A lot of them can because they live here. The ones who do not live here, they also want. But I told them, you need to learn Portuguese. So, they are learning in China (laughter). (I23, key-informant)*

In extract 3 a key informant discusses the new Chinese migration in professional terms as they are their clients. They present the largest motive for mobility for this group - it is for education purposes, so their children can pursue a Portuguese/international education. The father stays in China and the 14 days mandatory stay by the law makes them to only “come to spend vacations”. This is a typical description of an “astronaut family” (Ong, 1999) that is motivated by the continuous construction and management of the educated subject (Ong, 2007) that is more easily sought by the wealthier migration.

This extract also advances a defensive position in protecting the right and legitimacy of the resident by investment. First it draws from the rhetorical construction of sacrifice/rite of passage, common in the presentation and understanding of the Chinese economic migrant (Rodrigues, 2012). It also draws on cultural logics to tie the Chinese migration together beyond any other obvious socio-economic differences (“Only Chinese parents do this.”) to contextualize this sacrifice. By doing this it erases mobility privileges as the differentiating marker between old and new forms of mobility, because, after all, mobility requires renouncing something.

This position of defensive-ness is also present in the ways in which the interviewee re-enforces that they are integrated and intend to get involved. After 5 years of residency through the residency-by-investment programme, a path for long-term residency can be pursued. This type of residency permit, however, requires knowledge of Portuguese language. Their commitment to get involved long-term is thus re-enforced (*they make an effort because they want*), independently if they stay in the country, by learning Portuguese language from afar. Thus, this new migration makes use of mobility to seek connection between different places simultaneously. This extract tries to resolve this tension between local and multiple attachments and affiliations by putting forward a view of integration that is not threatened by physical distance – *if* the appropriate level of Portuguese language is acquired. Unsurprisingly, in the context of the residency-by-investment programme but not exclusively, mobility is integrated in the experience of citizenship. This relationship is developed further in the next section.

### **8.3.2. Theme 2 – Cosmopolitan citizenship and mobility: *in Portugal we know how to live***

In this set of interviews, mobility was at the heart of constructions of cosmopolitan citizenship. Mobility was presented as a strategy to combine better and different lifestyles and, even, comfort. Within this logic of strategic use, mobility to Portugal is understood through the lens of the global market, and the advantages it may offer. Still, for many of the participants of this study, Portugal did not fully satisfy this quest for a cosmopolitan lifestyle (contrary to other accounts in the literature, Ong, 1999, Liu-Farrer, 2016). For these participants, Portugal was, in fact, not developed/cosmopolitan *enough*. Its only value was as a gateway to a more cosmopolitan destinations (Surak, 2021), an intermediary place of “pleasant”-ness with easy access to more international and lively places (extract 4).

#### Extract 4

*So, think of Portugal as Sanya. You can live in Sanya, for vacations, also to live. When you want to see museum, big museum, or big things, or party, or activities, more international activities, you go to Shanghai, you go to Beijing, Guangzhou... You go to cities, like here, you go to London, Paris... Barcelona, you go wherever you want, you go to Milan, but to live... is good. Because if you live the whole year in Shanghai, you are also not... it's not pleasant. So, now and again you need holidays, and you think Portugal, more, more in that sense. (I25, key-informant)*



In extract 4, Portugal is compared to *Sanya*, the main city of a tropical island in the south sea of China, *Hainan*, and a popular vacation destination. The distinction between a pleasant place to live and places to develop more international activities, draws on the distinction that vacation destinations may not be places of vibrant cultural opportunities, but are necessary places of rest (*it's not pleasant, so now and again you need holidays*). There is a blurred representation between vacations and living (*you can live in Sanya for vacations, also to live*) because the local experience is deeply intertwined with the translocal experience of mobility, i.e., one does not exist without the other (Di Masso, et al., 2019). Although the participant is not an investment resident, but a recent resident in Portugal, it shows how mobility is integrated in the discourse of citizenship that is not exclusive to the residents by investment. In these accounts, to be able to engage with mobility as one pleases, fosters performances of citizenship that do not require local or everyday community building (Gaspar, 2017). These privileged mobility regimes, however, implicate privileged identities and positions (Torkington, 2012).

#### Extract 5

*So, we thought it would be... some opportunity for life, for new life here as well, and for the kids, maybe, because, politically, it is quite neutral, and China, is, more and more, becoming... target, by the Western countries, especially American, specially, France, might be. We... we felt that, if we can, economically, burden, burden that, we can allow our children to see what the world really is. We don't want sticking in one place and... to... to say, oh well, we are Chinese, let's see how great we, China, are. But instead, we don't want... to go any of the... destination, like USA, or... UK, or France, those bigger countries, and... to say, well, how great they are. So... we want them to be more... open minded, and just see the real truth by their experiences, and... maybe Portugal is a good start, because it is peace, and it is, neutral, hmm... politically, neutral. (I9, resident by investment)*

In this extract, Portugal is understood in a position of neutrality, offering a worldly perspective without being West-centred and without being nationalist. It is the middle ground between staying 'national/local' and becoming immersed into a fully westernised way of life that sees China as the "Other". Portugal does not incorporate the dynamics and values of big economic powers and does not emphasise antagonistic relationships with other economic powers either. In the absence of such geo-political tensions, it is a place of open-mindedness and of truth, a reality/state of mind not tainted by economic tensions. Still, the choice of Portugal can also be understood as a steppingstone for other westernized contexts, as children

would commonly get their high school diploma in Portugal, from an international school, and would pursue higher education in the US or the UK. This view of Portugal as “an entry point” is also shared by China’s global trade strategy through the Belt and Road Initiative - that sees Portugal as the gateway into European trade (Leandro & Duarte, 2020).

The opportunity of being in a geographic position of neutrality, however, is actively pursued because of economic means (*if we can economically, burden that*) – attaching citizenship opportunities with their socio-economic condition that is aligned with the commodification values of the residency-by-investment scheme. The language of agency and will permeates these accounts, making the contemporary discourse of mobility a discourse of empowerment, where lifestyles can be actively pursued and bought (Torkington, 2012). It is the socio-economic condition of the migrant that mediates more settled or more mobile citizenship representations and possibilities (Di Masso et al., 2019), allowing for a more dynamic and complex relationship between tourism and long-term residency (Gustafson, 2001).

### **8.3.3. Theme 3 - Citizenship intertwined in the narrative of global development:**

*Previously, the Chinese, we were quite... close minded, and when we open our market, the outcome is quite good*

We consider this theme a transversal one since it incorporates how the new migration, and the mobility privileges highlighted in the construction of cosmopolitan citizenship, are incorporated in everyday discourse. Particularly, the narrative of global development helped anchor the descriptions of a new mobility. Migrants from China, as a developing country, carry the risk of being mistaken as “older” generations of migrants (Ho & Kathiravelu, 2021). With the re-configuration of the migration profile, that was stimulated in Portugal by the residency-by-investment programme, there was a need to guarantee a place for the wealthier Chinese among the global elites.

#### Extract 7

*I know that, Portuguese people still haven't understood that China has developed a lot in the last years, I see that only after... visiting China they realize, “Geez, China is doing so well, it has developed so much, high-tech, high-speed trains,” (Addressing the interviewer), you know China, right? I think there should be more documentaries about current China, here in Portugal, so people know. Not everybody can go and visit, right? The conditions. But I think here, tv channels, the media, they have to promote more...*

*Promote this... the Portuguese are feeling also... There are many investors in Portugal... it's not only the three major investment companies, China Three Gorges, REN, State Grid, FOSUN, but also the Golden Visa investors, they know that the Chinese have the means, they have money (laughter). The people that work in these areas, they know, and they think the Chinese have a lot of money. That is why... they are here. They are investing in Portugal, right? (I23, key-informant)*

In extract 7 the interviewee discusses how the Portuguese society is still unaware of the current development of the Chinese society. China here is presented as a developed country, in contrast to common understandings of China in Portugal. The participant manages stake (Potter, 1996) by questioning the interviewer's experience in China. The interviewee argues that China's development is not just an abstract notion, it is something you can *see* if you ever go there. Also, the residency-by-investment programme is presented as part of the larger investments in national companies, a mechanism that has helped to put forward a representation of Chinese mobility in transformation. "The people that work in those areas" are aware of the potential for investment by the Chinese, whilst the overall Portuguese society is not. Migration is thus presented as an asset, as a contributor to the Portuguese economy – instead of a burden. This comparison between residents by investment with larger investment companies can be understood as an attempt to draw from market logics to seek further agreement (*They are investing in Portugal, right?*) from the interviewer. This extract is appealing to the supposedly obvious advantages of any forms of investment, in which the investment residency is also part of (Amante & Rodrigues, 2020; Gaspar, 2017).

#### Extract 8

*I see new companies coming, in Lisbon, we also... see... lots of very good companies coming, as well, so it's... it gives me the impression, that it is quite, the development, has some similarities with... Shanghai, maybe ten years ago. There are a lot of... foreign companies to... come, and the local market should be... the local market should be working with them. Because previously, Chinese, quite... close minded, and when we open our market, and welcomed lots of Western companies, and... of course... there are conflicts, there are culture conflicts, but... finally, the outcome is quite good, it is quite... international, it is quite... global village, and... it's quite... it's... no one will feel, it's no abnormal to see foreigners, from different countries in the streets, but here, I feel some strange that... if I seat here, and everyone look, at me, because I have an Asian face*

*(laughter). 'Hmmm, Chinese? How come you can be here?' (laughter) so... this is what I deal with in daily life... (I9, resident by investment)*

In extract 8, we see the logic of the global market being argued to foment international exchange. In this account, Lisbon is present at not yet fully international: only if it opens to international companies then the feeling of a global village would be achieved, similarly to Shanghai (*Because previously, Chinese, quite... close minded, and when we open our market*). Comparing Lisbon with Shanghai from 10 years ago shows China as being ahead of Portugal, in a position that could offer advice onto the processes of economic development (*the local market should be working with them*). This extract also highlights how that is the expected route of development, - through a globalized economy and exchange (Massey, 2006). Consequently, in the Chinese context, the logics of citizenship were transformed, and their norms were rearticulated to include diversity and plurality (Ong, 2007). In the account of this interviewee, the same has not yet happened in Lisbon, and, by extension, in Portugal. They say that an Asian face is received with surprise in everyday interactions – the interviewee suggests that this a sign of lack of development on behalf of the Portuguese. Portuguese people who are not aware of the globalizing trend and of China's development are seen as naïve and unaware of the workings of the global world, which has enabled wealthy Asian faces to populate other areas of the Portuguese society.

Throughout the interviews, the global flow of capital sustained the accounts of increasingly mobile and international citizenship – presented as the expected norm (Ong, 2006). Any other forms of being are seen as “becoming” and in transformation.

#### Extract 9

*sometimes they [Westerners] see, because there are a lot of tourists, or... the people that the first time come from China to... the... Western countries, they could be very... well... not behave good. From the like the... not, not say thank you, not say hello, not being very... like... sometimes they do something, that seem very... not civilized? That... I would say that... have more... patience. Because the things you have to understand, like thirty years ago... we cannot be able to... eat well. My parents, when they were kids, they basically cannot have enough food for themselves. So... when the nation cannot feed themselves, how you can expect that are being civilised? (I7, resident by investment)*

In extract 9 socio-economic differences are highlighted by mentioning differences in civility (Ho & Kathiravelu, 2021). The interviewee asks for “Westerners” to have more “patience”, as China is in transformation and not so long-ago people were struggling for food. Here the rapid development is highlighted as an enabler of civilized behaviour (Appadurai, 1996), but that may not be accessible to all. The recent past of under-development is mentioned - time, instead of socio-economic status more explicitly, explains differences in people’s behaviour as more or less aligned with the Western ideal. This resonates with Massey’s (2006) description of the unifying narrative of globalization where time is naturally assumed to explain how people are progressively caught up in the *ethos* of globalization. A view of a past in which an under-developed country provides less “civilized” migrants is compared with the current situation that allows for a new migration to rise – more educated and “civilized” as consequence. This is sustained by the assumption that this is *the* expected course of events. It is also this grand narrative that sustains a citizenship proposal where mobility is heavily incorporated, contesting solely place-based assumptions of citizenship (Di Masso, 2012), through the inevitability of global interconnectedness.

#### **8.4. Discussion**

This study explores accounts of everyday citizenship by a group of Chinese residents that were either beneficiaries of residency-by-investment programme recently implemented in Portugal or were involved in it, interviewed as key-informants. The neoliberal proposals of this programme helped articulate citizenship representations in the everyday, making use of strategies to naturalize them as ‘the way the world is’ (Castro & Mouro, 2016). The consequence is the invisibility of the discrepancy in residency and mobility rights that are being held exclusive to a few.

This study thus contributes to the study of everyday citizenship as constructed and discursively negotiated by citizens themselves. By doing this, it is possible to explore how policies and citizenship as a legal status are lived and made sense of in the everyday of societies and groups of migrants. This perspective helps to unveil the tensions around the meanings of citizenship and rights to mobility for foreign residents, and the processes and meanings involved in the establishment of a legal innovation that sees an exclusive group of people as more acceptable to pursue mobility. By looking at the meaning-making processes that draw from a

hegemonic, common-sensical representations of the market and global capitalism, we explored the limits of this discourse in critically evaluating the “worthiness” of this type of mobility.

Our analysis shows that Chinese migrants in Portugal, who have benefited from the investment residency programme and other key-informants, constructed a differentiation between groups of Chinese migrants. The differentiation of the ‘new migrant’ was based on education and willingness to re-locate because of capacity and opportunity. Older generations’ mobility paths were understood differently - lacking agency. Consequently, because of the free mobility this programme offers, citizenship is made sense of through the freedom to pursue opportunities across the globe to fulfil different needs.

Accordingly, residency by investment allows for mobility and residency to be intertwined phenomena re-enforcing a neoliberal view of citizenship – as the citizen that actively participates in the dynamics of global markets. As a consequence, a clear-cut representation between the foreign resident and the tourist is diminished (Gustafson, 2001; Torkington, 2012) leaving enough space to re-signify meanings of citizenship and, ultimately, of the multiple ways and conditions in which a migrant can be seen to be “integrated”. Helping to support these accounts is the narrative of global capitalism and the inevitability of (a particular type of) development (Massey, 2006) that make way for the articulation of citizenship with capital and mobility (Ong, 2006).

Yet, these accounts were presented in relation to different configurations of Portugal’s position in the world. These configurations gravitated between Portugal being neutral and far behind in its development in comparison to the Chinese metropolitan areas, or Portugal being a gateway to international/metropolitan/Western ideals, where Chinese modernity can be contested, as more relaxed and healthier lifestyles are sought (Nyíri & Beck, 2020).

Indeed, in these accounts, the East/West distinction does not map out neatly in the developed/underdeveloped distinction. This is because, in some of the interviewees’ perspectives, China is presented as more developed than Portugal (extract 8) and does not reflect a natural flow of development between the East and the West. Portugal commonly sits on the developed pole, but also, sometimes, it is positioned in-between the East and the West. Similarly, China is presented as ‘less civilized’ (extract 9) but also as more global (as in Shanghai in extract 8). These nuances are the result of everyday meaning-making that are strategically oriented towards either claiming a participation in the international dynamics of connectivity or to serve more relaxing lifestyles.

Still, the rearticulation of citizenship was presented as inevitable and dominant since “the world will become more interconnected” (Massey, 2006, p.187). The past was described

as justification of a type of mobility, and the present enabled a new type of mobility that aligns with the value of interconnectivity in global capitalism and of the opening to global markets - promoting diversity and plurality (Ong, 2006). Some tensions were presented, however, between an understanding of rights of global and local values (Glick- Schiller & Salazar, 2013), as claims for integration and involvement were frequently sought and defended, while both arenas for citizenship were being enjoyed (Di Masso, et al., 2019) (e.g., being able to apply to long-term residency or nationality by learning Portuguese from afar). But these tensions were framed by the unifying narrative of globalization, that understands the wealthy and educated mobile subject the new citizenship norm (Ong, 2006).

The consequence of such unifying view is the invisibility of the “selling citizenship” trend (Shachar, 2017) and how it perpetuates differences in mobility access where refugees and asylum seekers, in contrast, see their rights progressively diminished (Mavelli, 2018). The creation of such rigid representations of worthy and unworthy claims for mobility and transnational lifestyles (Appadurai, 1996), people and societies struggle with making sense of other alternatives in which a more just and equal access to mobility can be truly sought by all.





## **Study 4 - The impact of the law defined categories of foreign residency in understanding sub-groups of Chinese residents by the host society**

### **9.1. Introduction**

This study enquires whether and how the Portuguese law defined categories of foreign residency - related to work and investment - affect the understanding of Portuguese host-society in relation to Chinese residents. In Portugal, the group of Chinese residents comprises of residency-by-investment programme beneficiaries and work residents almost in the same proportion (Amante & Rodrigues, 2020). As highlighted in the press analysis, these laws have contributed to the creation of different sub-groups of Chinese residents that were visible in the public debate (see Chapter 7).

Most research examining relations between host societies and foreign residents have not included a strong view of the influence of context and of foreign residency policies (see Chapter 2). So far, a more precise focus on the state's role in reifying sub-groups of foreigners with different economic contributions has been overlooked. As seen in Chapter 6, in the analysis of the legislation regulating these categories, residents by investment or work are required to get involved in the national economy, the first through consumption (investment), and the second through production (work) (Comaroff & Comaroff, 2001). More attention is thus needed to how foreign residency laws may create sub-groups within a group of foreign residents that are associated with different social and economic contributions.

The economic emphasis involved the definition of such categories of foreign residency may influence the motives involved in supporting - or rejecting – the Chinese residents by host societies. This work will then assume economic competition theories to be more fitting to predict how the host society sees Chinese residents in relation to these law defining categories. For example, Esses and colleagues (2001) showed that laws that guarantee the economic success of migrants - either as a high-skill worker or as an unskilled worker - made participants see foreign residents as more threatening to the host society.

In the literature, economic competition theories emphasize the competition for resources between foreigners and the host society for explaining intergroup relations between host society

and foreign residents (Esses et al., 2001). Some scholars have developed two general hypotheses.

One relates to the fiscal burden hypothesis and the other to labour market competition hypothesis. The first hypothesis contends that groups of low-skilled migrants are seen to threaten host-society's access to resources (e.g. "exploiting" the welfare systems, Gibson, 2009), and, as consequence, they are seen more negatively (Esses et al., 2001).

The labour competition hypothesis regards to how high-skilled foreigner residents are seen to put at risk host society's access to high-skilled jobs (Esses et al., 2001; Malhotra, et al., 2013). A study in the USA, for example, analysed how a technology-related working visa - pursued mostly by Indian nationals – affected the perception of the group of Indian migrants and support for this particular visa. Results showed that economic threat negatively influenced the support of this type of visa, but not necessarily of overall Indian migration (Malhotra et al., 2013).

However, given the novelty of the residency-by-investment programme, it is unclear how the host-society might make sense of their beneficiaries and how they are understood to contribute to society. This programme allows residency rights through investment, but they are not required to stay long-term – and thus, in theory, they do not compete for jobs and resources. One proposal is that the residency-by-investment may be understood by neoliberalism as a political rationality (Ampudia de Haro & Gaspar, 2019). This political rationality may help to understand that investment of large amounts of money can be an "obvious"/rational migration policy choice with undeniable advantages to the country (Amante & Rodrigues, 2020; Santos et al., 2020). In this sense, some foreigners are understood to burden the national's welfare systems and may be seen as threats (Esses et al., 2001; Valentino et al., 2013), while other foreigner residents are potentially understood to "enhance" the economy with the injection of large sums of money (Shachar, 2017) and may be seen as indispensable for a thriving global-connected society (Guerra et al., 2016).

Indeed, research have emphasized that the ways in which foreign residents are received requires both the study of their threats and contributions in context. For example, Tartakovsky and Walsh (2020) conceptualize a threat-benefit model that is a multi-dimensional and a multi-level construct to analyse attitudes towards different groups of foreign residents.

According to this model, threat and benefits are appraised in different sub-domains (e.g. economic, physical or social cohesion threats or benefits) that are created by investigating public discourses (Tartakovsky & Walsh, 2016). Then, the general appraisal of foreign residents is analysed in relation to these threats and benefits. In our case, we rely on the discourse of the

press in assessing what threats or contributions can be relevant for the legally defined categories of foreign residency, and how they influence attitudes towards foreign residents.

Accordingly, we will build on this approach to explore how law defined categories of residency are affecting views of Chinese residents differentiating relevant types of threats and contributions. We chose two constructs that better suited this goal: intergroup threat (Stephan & Stephan, 2000) and functional indispensability (Guerra et al., 2016). Below we will describe these constructs and how they shape the attitudes towards foreign residents by the host society.

### **9.1.1. The role of threat**

The literature shows consistent evidence of the detrimental impact of perceived threat on attitudes towards foreigners (Rios et al., 2018; Verkuyten, 2018). High levels of perceived group threat are associated with high levels of prejudice, i.e., the more groups of foreigners are perceived as threatening by the host society, the more the host society will show negative attitudes towards them (Stephan & Stephan, 2000). Intergroup threat theory (Stephan et al., 2015) assumes two forms of group threat: realistic threat and symbolic threat.

Realistic threat is conceptualized based on realistic group conflict theory (Sherif, 1966, cit. in. Stephan & Stephan, 2000) that was concerned with the competition for scarce resources. Realistic threat, however, takes a wider perspective and considers “*any* threat to the welfare of the group and its members” (Stephan & Stephan, 2000, p. 25, emphasis added) that only requires to be perceived (as opposed to real) to affect negative intergroup outcomes. Symbolic threat involves “perceived group differences in morals, values, standards, beliefs and attitudes” putting at risk the group’ view of the world (Stephan & Stephan, 2000, p. 25, p. 25).

When analysed separately, realistic and symbolic threats can both be responsible for increasing prejudice (Rios et al., 2018; Stephan et al., 2005). Accordingly, a group can elicit either realistic or symbolic threat and thus provoke negative attitudes according to their different characteristics – either because they are seen to exploit resources and increase competition, or because they are seen to disrupt local values, traditions, or culture (Rios et al., 2018). Even though the two types of threat are strongly correlated (Verkuyten, 2009), more research is needed to differentiate them and their outcomes. For example, research has shown that Brexit supporters saw migrants to be a source of realistic and symbolic threat (Golec de Zavala et al., 2017). Other research showed how realistic threat *only* explains how Asian-American stereotypes are positive but attitudes towards them are negative. This is because their economic and professional success were seen as a threat to other people’s access to jobs, and

thus, contributed to worse intergroup outcomes - but there were no cultural threats associated (Maddux et al., 2008).

For this study, we will consider these forms of realistic and symbolic threat as economic and cultural threats, respectively. Even though the realistic threat relates to perceptions of any type of threat, usually, simplified measures of realistic threat (and the one used in this study) stress the competition of resources only (Shin & Dovidio, 2018) – an aspect more relevant to our study and the categories that are associated to different ways of economic participation. Accordingly, we will also propose that threats to “morals, values, standards, beliefs and attitudes” (Stephan & Stephan, 2000, p. 25, p. 25) comprise a threat to culture as a way of understanding the world.

Thus, in relation to the resident by investment, we hypothesize that it may affect economic threat and not cultural threat – because Chinese residents are not seen/presented as threatening to the Western way of living. Assuming that neoliberalism as a political rationality (Brown, 2015) is helping make sense of this investor category, we will examine whether the resident by investment may elicit less economic threat and consequently be related to more positive intergroup outcomes because their contribution to the economy is seen as an asset, and not a disruption.

### **9.1.2. The role of indispensability**

Along with threat, research has pointed to the role of contributions of foreign residents in influencing their appraisal. For instance, recent research examined the role of perceived group indispensability (Guerra et al., 2016) in explaining how host societies receive foreign groups. In the wake of increasingly globalized world and following the logics of the global market (Ong, 2007) more research has focused on how foreign residency may be seen as a positive asset. Instead of focusing on how foreigners are interpreted to drain nation-states, more and more research has focused on how, contrarily, a rhetoric of necessity is being constructed by nation-states, presenting (certain) foreign residents as indispensable for certain social-political configurations (Guerra, et al., 2015; Guerra et al., 2016; Verkuyten et al., 2014). Group indispensability, then, regards to the ways in which subgroups become necessary parts of superordinate category, in this case, the nation (Guerra, et al., 2016). This indispensability is divided into two domains. One relates to groups social and economic contribution – functional indispensability – and the other relates to the construction of the common superordinate identity – identity indispensability. The context and the historical relations between groups shape the

type of indispensability more relevant for intergroup outcomes. Particularly, “groups can be regarded as indispensable in a functionally advantageous way as contributing to the society’s economy” (Guerra et al., 2015, p. 869) without necessarily being seen as an integral part of the national identity. For instance, functional indispensability was associated with positive intergroup outcomes towards a recent migrant group in Portugal, generally perceived as high in competence, such as the Ukrainians (Guerra et al., 2015). Considering the arguments that were presented in the press in support of residency by investment, Chinese residents by investment should elicit high functional indispensability, which in turn should be related to positive intergroup outcomes between foreigner residents and host society.

### **9.1.3. Our approach, research questions and specific aims**

Overall, research shows that both threat and indispensability explain attitudes towards foreigners and affect intergroup relations between host society and foreign residents. Research shows that both constructs are correlated and are important to understand advantages and disadvantages of migration in context of foreign residency policies (Tartakovsky & Walsh, 2016, 2020; Thravalou et al., 2021; Malhotra et al., 2013).

The current study aims to contribute to the literature that is concerned with context-specific dynamics helping shape attitudes towards foreign residents. Specifically, we focus on the law defined categories that are associated to different representations of sub-groups of Chinese foreign residents in Portugal. We examine how the resident by investment and resident by work may be associated with different attitudes towards Chinese residents *because* they shape economic threats and contributions differently. So, we will test whether these categories shape economic threat and functional indispensability and how they contribute to different intergroup outcomes by the host society.

The goal of this study is two-fold. First (1), we examine how two categories defined by the Portuguese foreign residency law – that of foreign residency being granted through investment or work – impact different intergroup outcomes of Portuguese host society members towards Chinese residents: their perceived threat and indispensability to society and their attitudes towards Chinese residents (i.e., general evaluation, social distance, and migration policy preferences). Second (2), we will explore if the law defined categories are indirectly affecting intergroup attitudes towards Chinese residents, through associated threat and indispensability. Specifically, we explore how the categories of work and investment are re-enforcing the economic dimensions of foreign residency through economic threat and functional

indispensability *only*, and not cultural threat. Furthermore, given the social representations portrayed in the press related to Chinese investment residents (Study 2) – understood as bringing great positive economic impact - we hypothesize:

H1: The law defined categories will be associated with different intergroup outcomes. Specifically, residents by investment will be associated with less economic threat, less social distance and lower endorsement of restriction policies and higher functional indispensability and positive general evaluation, relative to the control condition. No differences are expected for the work condition relative to the control condition.

H2: The resident by investment will indirectly and positively affect attitudes towards Chinese residents, compared to the control condition, through perceptions of low economic threat and high functional indispensability.

## **9.2. Method**

### **9.2.1. Participants and procedure**

Main inclusion criterion for participation was Portuguese nationality (N= 473). After data screening to exclude (a) poor progress rate, i.e., not filling in all scales until the socio-demographics section (excluded n= 189) and (b) participants who failed the attention check (excluded n= 30), the final data consisted of 254 Portuguese nationals. They were aged between 17- 74 ( $M= 43.5$ ,  $SD=12.93$ ). In terms of gender, most of the participants identified as female (67%), then as male (31%), as non-binary (.4%) and a small percentage chose not to answer (.8%). Most participants lived in metropolitan areas, in the cities of Lisbon and Porto (50%), others in the greater metropolitan areas of those cities (33%), and a smaller portion lived in less urbanized/rural areas (17%). In terms of education, most of the sample has a higher education degree, either a bachelors, masters or doctorate degree (total 78%) and a smaller portion a secondary school degree (20%).

The study was distributed through Qualtrics software to facilitate online recruitment and to overcome the COVID-19 restrictions. During May 3 and May 21 2021, the questionnaire was shared in social media platforms and snowball sampling was also used. Participants were initially presented with an informed consent (Annex E.) stating that their participation was voluntary and anonymous.

Then, they were randomly assigned to one of three vignettes: investment (n= 87) vs. work (n= 73) vs. control (n=94). The vignettes were created by the research team (see Annex F. for the original texts). In the investment and work conditions, participants read a text with a description of different Chinese beneficiaries. These categories of foreign residency were described according to the law that regulates them (Law 23/2007 of July 4).

In the vignette presenting a Chinese resident by investment, participants read a text as to how investment residents needed to invest in the country, usually in real estate worth of 500.000, and that mandatory stay was of 14 days in a year.

The vignette presenting a Chinese resident by work stated that residents needed to have a job contract guaranteeing livelihood, and that mandatory stay was at least 6 months in a year.

In the control condition participants read an unrelated text of Chinese geography - about Mount Hua inspired by the webpage: [https://en.wikipedia.org/wiki/Mount\\_Hua](https://en.wikipedia.org/wiki/Mount_Hua) - with no mentions to the foreign residency legal framework.

The length of the materials presented in each vignette was similar. In all conditions, after reading the text, participants answered two questions to re-inforce its content (e.g., in the control condition participants were asked to imagine the scenery of Mount Hua, in the investment and work conditions participants were asked the extent to which they agreed with the law and its conditions for residency).

After the vignette was presented, participants answered to the measures of interest: (1) functional indispensability and economic and cultural threat were presented in one block, (2) general evaluation, social distance and migration policy preference scales were presented in a second block and finally (3) quantity and quality of contact and COVID-19 related blame/prejudice were presented.

Within each block, scales and items were presented in a randomized order. We then included an attention check (in which participants had to recall the content of the displayed text), before the socio-demographic questions. By the end of the questionnaire a debriefing was presented (Annex G.) where the study design was explained, and the content of the texts were shown to be true.

### **9.2.2. Measures**

**Functional Indispensability.** We used the measure developed by Guerra and colleagues (2016) to analyse the extent to which people thought Chinese residents in Portugal are indispensable for the economy's development. Participants were asked to indicate, on a 7-point scale (1=

strongly disagree to 7= strongly agree) their level of agreement on 6 items (e.g. “*Chinese residents contribute to the strength of the Portuguese economy*”) Higher scores indicate higher functional indispensability ( $\alpha = .87$ ).

**Economic Threat.** We adapted a short version of Stephan and colleagues (2000, 2005) realistic threat scale used by Gonzalez and colleagues (2008) comprising three items focussing on economic challenges. These were: “*Because of the presence of Chinese residents, Portuguese people have more difficulties in finding a job*”; “*Because of the presence of Chinese residents, Portuguese people have more difficulties in finding a house*”; “*Because of the presence of Chinese residents, unemployment in Portugal will increase*”. However, to contemplate different configurations in which economic threat is understood, it was also necessary to include other sources of competition, specifically, one driven by a position of privilege, such as the residency-by-investment is bringing. Three items were thus added inspired by Guerra and colleagues (2020) stating how Chinese residents are receiving special treatment by the Portuguese government. These are: “*Too much money is spent on Portuguese programs that benefit Chinese residents*”, “*The Portuguese legal system is more lenient on Chinese residents than other residents*”; “*The tax system in Portugal favours Chinese residents*”. Participants were asked to indicate in a 7-point Likert scale the degree of agreement (1= strongly disagree to 7= strongly agree) on these 6 items. Higher scores signal higher (realistic) economic threat ( $\alpha = .82$ ).

**Cultural Threat.** We also adapted a short version of Stephan and colleagues (2000, 2005) symbolic threat scale used by Gonzalez and colleagues (2008) comprising of three items. The items aimed to assess the level to which participants perceived Chinese residents to compromise Portuguese identity, norms, values, and culture, e.g. “*Portuguese norms and values are being threatened because of the presence of Chinese residents*”. Participants were asked to indicate in a 7-point Likert scale the degree of agreement (1= strongly disagree to 7= strongly agree) in relation to the items. Higher scores indicate higher cultural threat ( $\alpha = .90$ ).

**General Evaluation Scale.** We used the scale by Wright and colleagues (1997) in which participants rate in six bipolar adjective pairs their general feelings regarding Chinese residents in Portugal (7-point scale: cold-warm; negative-positive; hostile-friendly; suspicious-trusting;



contempt-respect; disgust- admiration). The higher the score the more positive the evaluation is ( $\alpha = .91$ ).

**Social Distance Index.** We used the social distance index adapted from Guerra and colleagues (2015). Participants indicated the extent to which they were favourable to have Chinese residents as co-workers, boss, neighbours, friends, and family using a 7-point scale (1= not at all to 7= very much). Following the original authors, the items were recoded, so the higher scores signify greater social distance ( $\alpha = .94$ ).

**Migration Policy Preferences.** We adapted the scale by Reijerse and colleagues (2015) to focus especially on residency laws in relation to the target-group, Chinese migrants. Specifically, we adapted the 5 items from the sub-scale assessing the endorsement of policies restricting immigration (e.g. “*Generally, it is too easy for Chinese migrants to attain residency in Portugal*”; “*Our government should set strict rules and conditions, which must be met, before immigrants can attain residency in Portugal*”), using a 7-point scale (1= strongly disagree to 7= strongly agree). Higher scores indicate endorsement of policies that restrict Chinese immigration and residency ( $\alpha = .82$ ).

**Intergroup Contact.** We used the scale by Voci and Hewstone (2003) to measure participant’s contact with Chinese residents in different contexts. Quantity of contact was assessed with four items (e.g. “*How often do you see Chinese residents in your neighbourhood?*”; “*How often do you interact with Chinese residents?*”) using a 7-point scale (1= never to 7=always). Quality of contact was assessed using four bipolar adjectives with a 7-point scale (involuntary/voluntary; forces/natural; unpleasant/pleasant; competitive/cooperative). A composite index to assess level of contact was calculated according to Voci and Hewstone (2003) by multiplying the score of quantity and quality of contact. A higher score indicates high quantity-quality contact ( $\alpha = .86$ ).

**Blaming Chinese Residents for COVID-19 pandemic.** We adapted and developed the measure of outgroup blame by Zagefka (2021). Participants indicated the extent to which they thought the Chinese government and Chinese residents were to blame for the current COVID-19 pandemic/spread of the virus (e.g. “*The Chinese government is to blame for the coronavirus crisis*”; “*I avoid contact with Chinese nationals because of fear of the virus transmission*”) The

measure has 7 items and uses a 7-point scale (1= strongly disagree to 7= strongly agree), higher scores indicate higher blame ( $\alpha=.84$ ).

### 9.3. Results

Descriptives and zero order correlations of all variables are presented in Table 9.1.

To test H1, we conducted a MANCOVA on all dependent variables – functional indispensability, economic threat, cultural threat, general evaluation, social distance, and endorsement of policies restricting immigration. Intergroup contact was used as a co-variate, as it traditionally explains attitudes towards migrants following the contact hypothesis (Pettigrew & Tropp, 2008). COVID-19 related blame/prejudice was also included as a co-variate because it was significantly related to the outcome measures of this study.<sup>7</sup>

The multivariate effect of the experimental condition was significant, Wilks'  $\lambda=.884$ ,  $F(12, 476)=2.53$ ,  $p=.003$ ,  $\eta^2p=.060$ . Univariate analysis (see Table 9.2) only showed main effects of the condition on functional indispensability ( $F(2, 243)=3.65$ ,  $p=.03$ ,  $\eta^2p=.03$ ) and economic threat ( $F(2, 243)=8.93$ ,  $p<.01$ ,  $\eta^2p=.07$ ). No main effects of the condition were found for cultural threat, general evaluation, and endorsement of restrictive policies, contrary to our prediction (H1).

Analysis of simple contrasts (see also Table 9.2) comparing the investment vs the control condition, showed that in the investment condition participants showed higher economic threat ( $p=.000$ ), lower perceived indispensability ( $p=.03$ ) and higher endorsement of restrictive policies ( $p=.03$ ). The direction of these differences was not in line with the hypothesis (H1). In line with H1, no differences were found between the work condition and the control condition.

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<sup>7</sup> We replicated the analysis without the covariates and the multivariate results were also significant (Wilks'  $\lambda=.897$ ,  $F(12, 482)=2.45$ ,  $p=.009$ ,  $\eta^2p=.053$ ). In the univariate results, however, without covariates, only the main effect on economic threat was significant  $F(2, 246)=5.62$ ,  $p<.01$ ,  $\eta^2p=.044$  (and not functional indispensability or endorsement of restrictive policies).

**Table 9.1** Means, standard deviations, and correlations between the variables

	<i>M</i>	<i>SD</i>	1	2	3	4	5	6	7	8
1.Category of the law	-	-								
2.Functional Indispensability	3.54	1.14	-.013							
3.Economic Threat	2.86	1.08	.065	-.29**						
4.Cultural Threat	1.94	1.16	-.007	-.29**	.73**					
5.General Evaluation	5.12	1.21	-.076	.35**	-.48**	-.47**				
6.Social Distance	2.79	1.44	-.039	-.47**	.41**	.53**	-.52**			
7.Restriction of Immigration	4.20	1.07	.070	-.50**	.64**	.55**	-.52**	.55**		
8.Contact	3.83	4.38	-.039	.30**	-.32**	-.34**	.59**	-.41**	-.33**	
9.COVID-19 prejudice	2.49	1.12	.022	-.36**	.43**	.45**	-.43**	.51**	.54**	-.29**

Note. \*\* $p < .01$ .

**Table 9.2** Foreign residency categories and control: Univariate Tests

	<i>M (SD)</i>			Univariate Test Results			Contrast Results (K Matrix) Investment vs. Control		
	Control ( $n=89$ )	Investment ( $n=87$ )	Work ( $n=72$ )	F	Sig.	$\eta^2_p$	Contrast Estimate ( <i>SE</i> )	Sig.	95% CI
Indispensability	3.66 (1.27)	3.32 (1.04)	3.65 (1.10)	3.65*	.027	.03	-.35* (.16)	.029	-.656, -.036
Economic Threat	2.62 (1.08)	3.14 (.99)	2.79 (1.04)	8.93**	.00	.01	.54** (.13)	.00	.273, .803
Cultural Threat	1.86 (1.12)	2.04 (1.13)	1.87 (1.11)	1.75	.18	.07	.20 (.15)	.17	-.088, .483
General Evaluation	5.23 (1.25)	5.03 (1.11)	5.02 (1.27)	.29	.75	.00	-.08 (.14)	.55	.194, -.102
Social Distance	2.83 (1.55)	2.76 (1.40)	2.71 (1.39)	.88	.42	.01	-.07 (.18)	.70	.283, -.242
Restriction immigration	4.05 (1.18)	4.30 (.95)	4.19 (1.03)	2.40	.09	.02	.28* (.13)	.03	.530, .122

### 9.3.1.1. Indirect effects of the categories of the law on intergroup outcomes

We tested the hypothesized indirect effect of the experimental condition using PROCESS bootstrapping macro (Model 4; Hayes, 2017) for SPSS with 5,000 resamples and 95% percentile bootstrap CI. The categories of the law were the predictors (dummy-coded: X1= control = 0, investment = 1, work = 0 and X2: control = 0, investment = 0, work = 1), functional indispensability, economic and cultural threat were parallel mediators, and general evaluation, social distance, and endorsement of restrictive policies were entered, separately, as outcomes. Intergroup contact and COVID-19 related blame/prejudice were entered as covariates.

**Outcome: General evaluation of Chinese residents.** Results showed a significant indirect effect of investment (X1) on the general evaluation of Chinese residents via economic threat ( $b = -.12, SE = .05, 95\% CI [-.25, -.03]$ ). Contrary to the expectation, participants in the investment condition, relative to those in the control, rated Chinese residents as more economically threatening which was then negatively related to their general evaluation. The indirect effects via functional indispensability and cultural threat were not significant (see Table 9.3). Also, no significant indirect effects were found for the work condition (X2).

**Outcome: Social distance in relation to Chinese residents.** Results showed a significant indirect effect of investment (X1) on social distance towards Chinese residents via functional indispensability ( $b = .11, SE = .05, 95\% CI [.01, .22]$ ). Contrary to prediction, participants in the investment condition relative to those in the control showed lower levels of functional indispensability which was then negatively related to social distance. The indirect effects via economic and cultural threat were not significant (see Table 9.4). Additionally, no significant indirect effects were found for the work condition (X2).

**Outcome: Endorsement of policies restricting Chinese mobility.** Finally, results showed a significant indirect effect of investment (X1) on the endorsement of policies restricting Chinese migration via functional indispensability ( $b = .09, SE = .04, 95\% CI [.01, .17]$ ) as well as, via economic threat ( $b = .22, SE = .07, 95\% CI [.10, .36]$ ). Contrary to our hypothesis, participants in the investment condition showed lower levels of functional indispensability, which was then negatively related to endorsement of restrictive policies. Participants in the investment condition showed higher levels of economic threat which was then positively related to the endorsement of policies restricting immigration. No significant indirect effects were found via cultural threat (see Table 9.5). No significant indirect effects were found for the work condition (X2).

**Table 9.3** *Indirect effects of foreign residency categories on general evaluation of Chinese residents*

	M (Functional Indispensability)			M (Economic Threat)			M(CulturalThreat)			Y (General Evaluation)		
	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p
Constant	4.22**	.22	.00	1.79**	.19	.00	1.02**	.20	.00	5.52**	.33	.00
X1 (Dummy)	-.35*	.16	.03	.54**	.14	.00	.20	.14	.17	.09	.14	.50
X2 (Dummy)	.06	.17	.71	.09	.14	.50	-.08	.15	.62	-.09	.14	.51
(cov)	.06**	.02	.00	-.04**	.01	.00	-.05**	.01	.00	.12**	.01	.00
contact (cov)	-.32**	.06	.00	.41**	.05	.00	.43**	.06	.00	-.13*	.06	.03
covid-19												
M(FI)	-	-	-	-	-	-	-	-	-	.09	.06	.09
M(ET)	-	-	-	-	-	-	-	-	-	-.23**	.08	.00
M(CT)	-	-	-	-	-	-	-	-	-	-.11	.07	.16
	R <sup>2</sup> =.1991			R <sup>2</sup> =.3073			R <sup>2</sup> =.2869			R <sup>2</sup> =.4794		
	F(4,243)=15.1016, p<.001			F(4,243)= 26.9487, p<.001			F(4,243)= 24.4433, p<.001			F(7,240)=31.5745, p<.001		

**Table 9.4** *Indirect effects of foreign residency categories on social distance towards Chinese residents*

	M (Functional Indispensability)			M (Economic Threat)			M(Cultural Threat)			Y (Social Distance)		
	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p
Constant	4.25**	.22	.00	1.78**	.18	.00	1.01**	.20	.00	2.69**	.39	.00
X1 (Dummy)	-.35*	.16	.03	.54**	.13	.00	.20	.14	.17	-.23	.17	.17
X2 (Dummy)	.04	.16	.80	.10	.14	.47	-.07	.15	.67	-.17	.17	.31
(cov)	.05**	.02	.00	-.04**	.01	.00	-.05**	.01	.00	-.05**	.02	.00
contact (cov)	-.32**	.06	.00	.41**	.05	.00	.43**	.06	.00	.30**	.07	.00
covid-19												
M(FI)	-	-	-	-	-	-	-	-	-	-.31**	.07	.00
M(ET)	-	-	-	-	-	-	-	-	-	-.05	.10	.58
M(CT)	-	-	-	-	-	-	-	-	-	.45**	.09	.00
	R <sup>2</sup> =.1952			R <sup>2</sup> =.3070			R <sup>2</sup> =.2854			R <sup>2</sup> =.4841		
	F(4,244)=14.7933, p<.001			F(4,244)=27.0245, p<.001			F(4,244)=24.3633, p<.001			F(7,241)= 32.3084, p<.001		

**Table 9.5** *Indirect effects of foreign residency categories on endorsement of policies restricting immigration*

	M (Functional Indispensability)			M (Economic Threat)			M(CulturalThreat)			Y (Restricting Immigration)		
	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p	Coeff.	SE	p
Constant	4.24**	.22	.00	1.78**	.18	.00	1.01**	.20	.00	3.37**	.25	.00
X1 (Dummy)	-.35*	.16	.02	.54**	.13	.00	.20	.14	.17	-.04	.11	.74
X2 (Dummy)	.04	.16	.80	.10	.14	.48	-.06	.15	.66	.10	.11	.33
(cov)	.05**	.01	.00	-.04**	.01	.00	-.05**	.01	.00	-.01	.01	.41
contact (cov)	-.32**	.06	.00	.41**	.05	.00	.43**	.05	.00	.18**	.05	.00
covid-19												
M(FI)	-	-	-	-	-	-	-	-	-	-.25**	.04	.00
M(ET)	-	-	-	-	-	-	-	-	-	.41**	.06	.00
M(CT)	-	-	-	-	-	-	-	-	-	.06	.06	.31
	R <sup>2</sup> =.1952			R <sup>2</sup> =.3070			R <sup>2</sup> =.2854			R <sup>2</sup> =.5649		
	F(4,244)=14.7933, p<.001			F(4,244)= 27.0245, p<.001			F(4,244)= 24.3633, p<.001			F(7,241)=44.7059, p<.001		

## 9.4. Discussion

This study examined how the legal and institutional sphere, that helps define categories of foreign residents through different rights and duties, may be shaping intergroup relations between the host society and Chinese residents.

We focussed on Chinese residents because they are the group that most used the residency-by-investment scheme (Amante & Rodrigues, 2020; Gaspar & Ampudia de Haro, 2020). In doing so, this study shows the need of analysing the social and political contexts in which groups of residents are made sense of – and the power of foreign residency laws in differentiating them. This way, this study explores the context specific dynamics that may lead to how different groups of foreign residents are received (Malhotra et al., 2013; Savaş et al., 2021; Tartakovsky & Walsh, 2020).

First, we tested whether the Chinese residents by investment and by work were perceived as posing an economic threat, were perceived as contributing to society (functional indispensability) and were regarded more positively (general evaluation; social and endorsement of restrictive migration policies).

Contrarily to our hypothesis, results showed that resident by investment only affected perceived functional indispensability, perceived economic threat, and the endorsement of restrictive immigration policies, and not general evaluation and social distance in relation to Chinese residents (relative to the control condition). Specifically, and contrarily to our expectation, the analysis showed that participants that read about the Chinese resident by investment understood them as less indispensable, more economically threatening and were also more likely to endorse restrictive policies towards them.

Thus, Chinese investment residents were seen as more economically threatening and as less indispensable to the Portuguese society. Participants reading about Chinese residency-by-investment also showed higher endorsement of more restrictive immigration policies, i.e., wanting to limit the entrance and permanence of Chinese potential residents in relation to the control group.

These results seem to be aligned with a labour competition hypothesis (Esses et al., 2001; Malhotra et al., 2013; Valentino et al. 2013), that even though these residents are not putting at risk, in principle, jobs or other resources, they were understood to disrupt – instead of enhancing – the local economy. These findings show that host society seems to identify problems

associated with this programme – in contrast with the view of the press in the initial stages of implementation, that was pushing for a “only benefits” view of it (Santos et al., 2020).

In relation to cultural threat, however, the findings generally supported our hypothesis (H1). Cultural threat was not influenced by the category of investment. This is in line with our reasoning that the category of investment residency is mainly related to economic reasons for mobility, and not necessarily with cultural sources of threat. This supports the recent concern of the literature in analysing the appraisal of foreigners in relation to specific groups and within their institutional and economic contexts (Malhotra et al. 2013; Valentino et al. 2013).

This study also contributes to understand how different types of threat can also be independently and unequally responsible of psycho-social outcomes (Rios et al., 2018) – even though the literature shows that economic and cultural threats are correlated (Verkuyten, 2009; Thravalou et al., 2021). This does not mean that cultural measures are not predictors of outcomes more generally, in fact these, usually, show stronger effects (Valentino et al., 2013). But these results suggest that when groups are presented exclusively in economic terms, cultural threat may not be as salient and intergroup outcomes need to be tested according to their context specific characteristics and discourses.

Second, we tested whether through economic threat and functional indispensability, the law defining categories of foreign residency indirectly impacted different intergroup outcomes, i.e., general evaluation of Chinese residents, social distance from Chinese residents and the endorsement of restrictive policies. The hypothesis was partially confirmed, i.e., the indirect effects occurred but not in the hypothesized direction nor through both mediators.

Residents by investment were negatively appraised through high economic threat and low indispensability. Furthermore, there were differences in the role of economic threat and indispensability in affecting outcomes. In comparing participants that read about Chinese residents by investment or an unrelated theme (control), only the outcome endorsement of policies restricting the entrance of Chinese migrants was indirectly affected by both – following a threat-benefit model (Tartakovsky & Walsh, 2020; Thravalou et al., 2021). General evaluation of Chinese residents was indirectly affected by economic threat only. Social distance from Chinese residents was indirectly affected by functional indispensability only. It is unclear why the dyad of threat and indispensability did not affect the measures of general evaluation and social distance. More research is needed to explore these differences in outcomes, mainly, whether the differences between behavioural (social distance) or attitudinal (general evaluation) measures are responsible for this discrepancy. Still, it could be the case that given the focus on

legally defining categories, that policy measures (such as the one of endorsement of restrictive policies) were more sensitive to associations with the vignettes presented.

In relation to the unexpected direction of the findings, i.e., investment residents eliciting more threat, less indispensability, indirectly affecting worse outcomes, we discuss possible reasons. One is that this study was conducted almost 10 years after the residency-by-investment programme was first implemented. The debate around it might have changed since its initial period that was emphasizing the “undeniable” economic advantages. A longitudinal study could better grasp the development of these dynamics. Furthermore, the consequences of such programmes in the gentrification of the cities of Lisbon and Porto have been more widely discussed in recent times. In fact, the investment residency law will soon restrict the purchase of real estate in areas of higher population density. Our pool of participants lived in the cities and surrounding areas (83% of the sample) and may have debated this impact in the housing conditions more intensively. Further research could explore the role of city of residence in which the differences between these law defining categories for residency are affecting everyday interactions (Zisakou & Figgou, 2021). In this way, it would be possible to compare the local-specific repercussions of such categories of foreign residents with more detail.

#### **9.4.1. Limitations and future research**

In terms of methodological challenges, we used explicit measures that may be prone to social desirability. In particular, the general evaluation scale (Wright et al., 1997) in relation to Chinese residents had a poorer completion rate in comparison with the other dependent measures. Although it is unclear why this happened, this is a scale that decontextualizes attitudes from everyday interactions (bipolar scale of feelings towards Chinese residents, e.g. disgust/admiration).

There were also challenges related to the online dissemination of the survey – characteristics of the sample are not truly heterogenous and reflecting the Portuguese population - and the impossibility of applying it in the context of the lab, where we would guarantee good conditions for survey completion (e.g. attention).

Finally, we cannot claim the generality of these results to other countries where the residency-by-investment has been implemented (e.g. Spain, Hungary, Greece), i.e., this study’s context dependent nature should be acknowledged. This is also the strength of this study. It highlights the need to explore context-specific characteristics that included legal categories and also public discourses, to explore how such a programme is made sense of in different countries



as well. In Portugal, Chinese residents by investment elicit worse intergroup outcomes by the host society. Research in other countries should explore whether this pattern is similar.

Despite these limitations, this study suggests the need to better analyse the contexts in which the entrance and permanence of foreigners is understood and the different categories of meaning that can help shape their acceptance or rejection (Savaş et al., 2021; Tartakovsky & Walsh, 2020). Although our hypotheses were not totally confirmed, our main findings showed how the categories proposed in the law are associated with different opinions about Chinese residents in Portugal and foreign residency policies.



## **SECTION III. GENERAL DISCUSSION**



This dissertation explored how meanings of citizenship are being shaped by the interrelated dynamics of laws/institutions and everyday meaning-making in diverse social arenas. Drawing from the theory of social representations (Moscovici, 1961/1976, 1984, 1988) as a perspective that helps conceptualize the processes of transformation and stabilization of meaning, we explored the logics of the reified and the consensual spheres in putting forward meanings of “the competent membership in the polity” (Isin & Wood, 1999, p.4) in relation to foreign residency laws. In particular, we explored the meanings surrounding the residency-by-investment programme that was recently implemented in Portugal and presupposes little community involvement by foreigner residents in exchange of investment. Chinese nationals were the main beneficiaries of this residency by investment programme, affecting the reconfiguration of the migration profile of this group in Portugal (Amante & Rodrigues, 2020) and so they were the focus of this work.

This work thus proposes a perspective that complements the ongoing theorizing of the social psychology of citizenship by incorporating the analysis of two forces and their interactions - also defended in citizenship studies more broadly (Bloemraad, 2018; Bloemraad, et al., 2019). On the one hand, we focussed on the forces that make certain representations of citizenship institutionalized and reified in practices of institutions, as a status (Castro, 2012; Batel & Castro, 2009). On the other hand, we analysed how citizenship is made by citizens themselves, as everyday citizenship (Andreouli, 2009). As a reified status, citizenship has a specific, thus restrictive, definition (Castro & Santos, 2020). Everyday citizenship relates to the meanings that are more diverse and prone to debate and contestation (Andreouli, 2019).

By focusing on the residency-by-investment programme in Portugal we analysed the configurations of citizenship drawing from neoliberalism as a political rationality, as affecting everyday meaning and not only political choices and governance (Brown, 2015; Mitchel, 2016; Ong, 2007). This work thus explores how neoliberal proposals of citizenship are being shaped and debated in different social arenas of the Portuguese context. Particularly, this work tried to reply to the following research questions, as mentioned in the general introduction:

1. What are the citizenship representations supported by Portuguese laws and institutions?  
Particularly:
  - (a) what are the tensions involved in the meanings of citizenship presented by the text of law of foreign residency and
  - (b) by the legal experts that help apply the law?

2. How is the residency-by-investment programme being debated in everyday interactions and in relation to and by Chinese residents? Particularly:
  - (a) what are the processes involved in the presentation of Chinese residents and investment residency in the press;
  - (b) how is residency-by-investment discussed and made-sense of by Chinese residents and
  - (c) how does such legal definition of foreign residency contribute to processes involved in hindering or facilitating Chinese residents' everyday citizenship by the Portuguese host society.

Thus, we first analysed how meanings of citizenship were stabilized in the text of the Portuguese laws and how they were presented by legal experts. Then we explored the debate around the residency-by-investment scheme. Particularly, we explored whether the discussion surrounding novel requirements for foreign residency unveiled the contested nature of citizenship as a debated topic in construction and transformation. Given the emphasis on investment/socio-economic condition, the residency-by-investment programme poses challenges to the universal/equal rights framework of citizenship by stratifying groups (Bosniak, 2006; Soysal, 1994). It also puts at risk Marshall's (1950) initial conceptualization of citizenship status that, specifically, theorized on different dimensions of citizenship to mitigate the inequalities brought by class. Some scholars argue that the residency-by-investment programme epitomises the neoliberal "mutations" of citizenship (Ong, 2006) as a policy, by commodifying it (Mavelli, 2018; Shachar, 2017; Tanasoca, 2016).

This work relies on the theory of social representations as a general framework but tries to incorporate work from other disciplines to help complexify and complement how social psychology can approach the particular case of residency-by-investment scheme in context of Chinese mobility. This work tried to incorporate findings from social psychology of migration (Jetten & Esses, 2018; Verkuyten, 2018), human geography (Massey, 1991, 2006; Mitchel, 2016), anthropology (Ong, 1999, 2006), political science (Mouffe, 2005; Wood, 2016), and environmental psychology (Di Masso et al., 2019) to help theorize what *neoliberal* citizenship *means* and *does* in this context. Throughout this work we analysed neoliberal citizenship in relation to its content and meanings, i.e., a citizenship proposal valuing the individual's relation to and participation in the global and local markets (Ong, 2006). We also analysed it in relation to the discursive format of depoliticisation (Boager & Castro, 2020; Maesele & Raeijmaekers, 2017; Santos et al., 2020; Wood, 2016) that hinders the (political) debate of citizenship meanings, by presenting it as 'the way the world is' (Castro & Mouro, 2016).

Such neoliberal contextualization to this topic of foreign residency required an exploration of how the global market participates in the constructions of these meanings both institutionally and as everyday meaning-making (Glick-Shiller & Salazar, 2013). Particularly, the intersection of the institutional and the everyday to express this neoliberal proposal, also instigates the study of how mobility is sought and made legitimate in different social contexts and by different foreign residents (Ellis & Bhatia, 2019). Mobility flows are responding to “globe-spanning relationships of power” as these are shaped by “social, political, cultural and economic relations of capital production as they play out within specific local contexts” (Glick-Shiller & Salazar, 2013, p.195-196).

For this discussion we will first present our empirical findings and then the theoretical contributions.

Study 1 analysed the foreign residency laws and a mediating system that helps apply these laws to explore the (neoliberal) values and social representations of citizenship as written and practiced by state institutions and the extent to which they reflect neoliberal technologies (Ong, 2007). Study 2 focused on a mediating system on the side of the consensual sphere – the press – that presented the issue of the residency-by-investment law as a depoliticised issue. Study 3 is an interview study conducted with Chinese residents, some of them beneficiaries of the residency-by-investment programme, showing how it is presented as a sign of the times, and a new citizenship norm. Study 4 explores the perspective of the host society in relation to the Chinese resident by investment, showing more complex understanding of the threats associated to such a type of mobility.

After an overview of the empirical studies, the next section will focus on the three theoretical contributions of this work. The first relates to the framework of the social psychology of citizenship, by proposing the interdependent dynamics of the reified and the consensual spheres in shaping meanings of citizenship. The second relates to the study of neoliberalism as a cultural repertoire characterized by depoliticisation, promoting the study of how neoliberalism’s proposals are becoming part of common-sense. The third relates to the study of neoliberal citizenship in its domains of reification and/or debate, reflecting on the dynamics of the institutional and the everyday interactions in its creation and transformation.

Lastly, we will present a section on the limitations of our findings and directions for future studies.

## 10.1. Summary and main findings

In this section we will present an overview of theoretical framework adopted and the empirical studies conducted. Drawing from the theory of social representations (Chapter 1), we approached the topic of the constructed meanings of citizenship, the topic of study of the social psychology of citizenship (Chapter 2). We then by emphasized the socio-psychological processes involved in defining citizenship for foreign residents: as a status, i.e., reified in laws and institutional practices, and as practice, i.e., as debated and in transformation, characteristic of everyday meaning-making.

We also showed the importance of approaching the issue of citizenship – in this work, as the rights of foreign residents – through the lens of depoliticisation and neoliberalism as a political rationality (Chapter 3). We particularly looked at newly implemented residency-by-investment that suggests a view of “citizenship for sale”, as a neoliberal policy, that was seen to transform the Chinese migration profile in the Portuguese context (Chapter 4). We conducted 4 studies to explore the problem of how a legal innovation – following a view of citizenship that is neoliberal, emphasizing investment and mobility and de-emphasizing (local) community building by foreign residents (Gaspar, 2017) – is incorporated in the ‘battles of ideas’ that are characteristic of citizenship.

**Study 1** focused on the interdependent dynamic of the reified and the consensual spheres and allowed for an in-depth analysis of the values and social representations inscribed in the Portuguese foreign residency laws. The analysis shows how the law is defining meanings of citizenship, that are proposing different rights and duties among them, stratifying foreign residents into different categories of rights and duties. The most notable distinction was between the investment and work foreign resident that have different permanence requirements and different obligations in relation to their involvement with the job market. Implicitly, it could be said that the “effortfulness” repertoire (Gibson, 2009; Gibson et al., 2018) is salient when foreign residents settling to work need to solve a series of bureaucratic and legal dilemmas to prove their worthiness of staying. These ideas were also present in the perspectives of the legal experts interviewed in this study, that emphasized this distinction by framing it in relation to the ‘empowered’ foreign resident with facilitated institutional communication (i.e., residents by investment) in contrast with the ‘helpless’ foreign resident that needs to prove themselves worthy of acceptance (e.g. residents by work). These interviews showed how the law serves to



reify these two representations that are part of the consensual sphere. This does not mean that residency-by-investment was supported and defended by these interviewees, quite the contrary – the legal experts were critical of the easiness of the procedure and the bureaucratic inequalities it created. What it did show was that residency-by-investment was made sense of in relation to a distinction that separates foreign residents in terms of their relationship and motives for mobility (Erdal & Oeppen, 2018).

Additionally, interviews also showed how citizenship is made complex through interpretation. The reified meanings of the law and everyday meaning-making are made salient in these institutional practices. They can work towards opening alternative citizenship representations and inclusion, or be restrictive of other perspectives (Batel, 2010).

**Study 2** explored the press presentation of the residency-by-investment programme in relation to the Chinese residents. We performed a two-step analysis of the articles in the press, that in a first phase focused on Chinese residents in general, and the second on the portrait of Chinese investment beneficiaries in particular. The first analysis, using a computerized data mining software, showed how the new law was contributing to the creation of a different category of foreign resident, with different word associations between the resident-by-investment and other forms of mobility. A more fine-grain analysis using content analysis - the second step – explored the representation of Chinese investment beneficiaries. The analysis showed a mechanism of depoliticisation presented Chinese investment residents outside the citizenship debate, i.e., outside the “immigration debate” (Wills, 2010), by not discussing the change in rights and duties of foreign residents. Concealing the tension that such a programme brings to the meanings of citizenship, it did not show the tensions and debates that such configuration can provoke, nor did it make clear its neoliberal orientation, i.e., as a result of (ideological) struggles and debate. Most of the analysed articles presented the modality of diffusion that did not integrate tensions or other perspectives of this programme. In this sense, it appealed to hegemonic social representations, or to common-sense in the ways in which it was presented. Chinese investment residents were not presented as foreign residents, or migrants in the press, but as ‘investors’ that did not intend to reside. Residency-by-investment was mainly presented as a technocratic solution for the problem of economic growth, - a common strategy for depoliticising an issue.

In **Study 3** we conducted interviews with these beneficiaries and other Chinese residents or naturalized Portuguese. Using thematic analysis, we explored their everyday experiences of citizenship in three interrelated themes. Theme 1 showed how the community was divided into old and new forms of migration, reflecting old and new forms of citizenship. Old forms of

mobility were characterized by ‘necessity’ and newer forms of mobility as ‘will’. This distinction worked to emphasize boundaries between groups that were differentiated according to socio-economic status.

Theme 2 emphasized how new forms of mobility, characterized by will and increasing mobility and flexibility (resonating a view of cosmopolitan citizenship, Calhoun 2002) were put forward to help construct these new forms of citizenship as the new expected norm (Ong, 2006). These representations of citizenship emphasized the interconnectedness with the world, multi-place attachments, and the interrelated experience of place and mobility. Mobility and immobility, instead of being presented in an opposing dichotomy, were presented as deeply dependent on one another to make up mobile lifestyles (Di Masso et al., 2019; Gustafson, 2001; Torkinton, 2012).

Theme 3 explored how the different forms of mobility (old and new) were presented as an inevitability of global development. This was a strategy used to lighten a strong we/them distinction in the present. This was done by advancing a narrative in which old forms of mobility were a characteristic of the past, and new forms of mobility are a characteristic of the (globalized) present. These ideas were brought by the inevitability of globalization and world development in which the “economic-accumulator” Chinese migrant in Europe (Nyíri & Beck, 2020) is being substituted by middle-class Chinese families that seek healthier and more relaxed lifestyles that are not possible in their country of origin. Furthermore, we reflected on how neoliberalism, as a cultural repertoire supporting globalization, was helping to naturalize these transformations. The consequence of such naturalization was to hide the “selling citizenship” trend (Shachar, 2017) and the inequalities associated to different access to mobility rights.

**Study 4** showed the importance of context dependent factors in understanding how foreign residents are received by host societies. For this study we applied a survey applied to the host society. Although what it is meant by host society is subject of much discussion (Howarth, et al., 2014; Verkuyten, 2018;), we considered individuals with Portuguese nationality as eligible participants. This study aimed to explore how the description of two legally defined categories of foreign residency applied to Chinese residents– the resident by investment and the resident by work - can influence intergroup relations. Our hypotheses were constructed based on (a) economic competition theories in predicting intergroup relations, i.e., the perceived competition for resources (threats and/or benefits) affect how foreign residents and host societies interact, and (b) context-specific factors, such as the public debate surrounding the residents by investment analysed in the press analysis (Study 2) that only presented the advantages of this programme. We then hypothesized that the resident by investment would relate to more positive

intergroup outcomes, negatively influencing economic threat and positively influencing functional indispensability. Results showed a partial confirmation of our hypotheses. The resident by investment influenced perceived economic threat, functional indispensability, and the endorsement of restrictive migration policies. Also, for this category, economic threat and functional indispensability indirectly affected intergroup outcomes in comparison with the control group.

However, the Chinese residents by investment elicited worse intergroup outcomes, contrarily to our predictions. This means that the host society mobilized other representations – and not the ones that the press and governmental officials tried to put forward (Study 2). Future research should explore these social representations more in-depth, as mobilized in focus groups or interviews. Recent changes to the residency-by-investment legislation (e.g. real state purchase is now only possible in low density areas) suggests that other/alternative representations are being created and transformed. Furthermore, the data was collected during the COVID-19 pandemic where meanings of citizenship and mobility were also in transformation (Andreouli & Brice, 2021).

The combination of these studies showed the complex and debated nature of the residency-by-investment in different social arenas. Unsurprisingly, our theoretical starting point is also our end point – the study of the social psychology of citizenship requires the study of how citizenship is debated and transformed and within the dynamics of power that are working towards the stabilization of such meanings by different actors (Negura et al., 2020). Particularly, these studies relied on the interrelated dynamics of the reified and the consensual sphere (Castro & Batel, 2008). In relation to the residency by investment programme specifically, these studies explored the strategies of reification (Batel & Castro, 2009) that can be brought by (1) the text of law by defining different rights and duties between groups of foreign residents (Study 1) and (b) in everyday meaning-making, by resorting to taken for granted ideas as a consequence of ‘the way the world is’ (Castro & Mouro, 2016). This is shown by the press (Study 2) and by Chinese residents (Study 3) although it is done differently. Yet this naturalization does not limit other perspectives to arise, like the host society has showed (Study 4).

## **10.2. Theoretical contributions: a social psychology of citizenship framework for the study of (neoliberal) citizenship**

Empirically, these studies provide rich data on how the residency by investment programme is being articulated in different arenas, in the legal/institutional and in everyday interactions in the Portuguese context. Theoretically, this work contributes to the development of the social psychology of citizenship and to the study of neoliberalism, and of neoliberal citizenship, in social psychology. We will turn to each one of these contributions next.

*The interdependent relation between the reified and the consensual spheres in shaping meanings of citizenship*

The first contribution regards the approach presented for the study of meanings of citizenship. This dissertation proposes the study of the interaction between the institutional and the everyday in shaping meanings surrounding the rights of foreign residents. When discussing the psychosocial processes involved in the entry and permanence of foreign residents in any given country, often the institutional side is neglected (Andreouli & Howarth, 2013; Silka, 2018). This dissertation tries to fill this gap by conceptualizing citizenship as the struggles over the meanings involved in ‘who is the competent member in the polity’ and applied to the study of foreign residency. The construction of these meanings necessarily involves ‘battles of ideas’ during the implementation of new laws and institutions and during their reception, allowing for different reactions to occur - from acceptance to contestation or ambivalence (Castro, 2012, 2015, 2019; Mouro & Castro, 2016). As mentioned in Study 1, the ways in which social representations are incorporated in laws/institutions show the result of a process of simplification of everyday struggles – they are the ‘provisional’ winners of ‘battles of ideas’ during a particular time and place. These are collective agreements of (national) priorities. In Portugal, these priorities reflected neoliberal values when the residency-by-investment scheme was implemented in 2012.

The reified sphere of laws and institutions define citizenship by crystalizing it in the text of law (Castro, 2012) although it can still carry tensions and dilemmas in it (Gray & Griffin, 2013). In fact, these legal tensions are more visible in mediating systems part of the reified sphere (Castro & Batel, 2008), where these dilemmas require the participation of the consensual sphere to solve them. This is also a domain that requires more attention in the social psychology of citizenship (Stevenson et al., 2015) to which this dissertation contributes to. This is the case of the experts that use citizenship requirements and meanings in their everyday practices in granting a citizenship status (Caillaud, et al., 2021; Morant, 2006; Renedo & Jovchelovitch, 2007) showing that institutional cultures are embedded in everyday meanings and struggles.

We identified some strategies in which the legal dilemmas of the foreign residency law – dilemmas of citizenship -, as written in the legal text, were complexified through ideas of the consensual – as described by legal experts that help foreign residents make sense of laws. One, is that this complexification can be done by interpretation. When guidelines are poor, legal experts resort to (other) meanings from the consensual sphere to make sense of the requirements of the law. Second, institutions implement practices that help to further divide categories of foreign residents, exemplified by the residency-by-investment case in which they were given privileged access to the services.

Yet, the interviews with legal experts (Study 1), even though they were critical about the residency-by-investment law and how it was being put into practice, showed that to make sense of such a law, they resort to ideas that the law itself was supporting: foreigners applying to the investment scheme were *empowered*, migrating because *they wanted* to move. Contrarily, other migrants were presented as *helpless*, *forced* to migration because of their socio-economic situations and need to work hard to gain their status. This distinction - stabilized through the work of the text of law - also intersects with the “effortfulness” repertoire or “earned citizenship” frameworks to make sense of foreign residency and mobility, as other research in, for example, the UK have highlighted (Andreouli & Dashtipour, 2014; Gibson, 2011; Gibson et al., 2018). At the basis of such representations and practices are dilemmas that were solved to considered who can become a member of the polity. Usually these meanings emphasize foreign residents’ individual effort and commitment of “earning one’s right” (Andreouli & Dashtipour, 2014, p. 102). In case of the resident by investment, they are seen to ‘earn’ residency rights through an act of investment.

More research is thus needed about these moments of interaction between the institutions that are bureaucratically granting rights and foreign residents. These are moments in which the rights of foreign residents are being presented, made sense of and *effectively* granted. The social psychology of citizenship and of migration needs to explore how institutions articulate the meanings of the reified sphere and the consensual that can, consequently, facilitate foreign residents’ citizenship status, or contrarily, hinder their rights. This aspect is relevant, given social psychology’s focus on how foreign residents are settling in new countries. However, these dynamics are often overlooked. Institutional interactions that are more flexible and facilitating may help foreign residents understand if they are being welcomed – or institutional practices can signal they are being unwelcomed (Silka, 2018). Thus, it is an oversimplification to assume that a citizenship status flows from the reified to the consensual sphere (Barnes et

al., 2004) – these spheres are always in interaction, protagonists of struggles and debates, even on the side of institutional practices.

In the consensual sphere, citizenship disputes are more visible than in the reified sphere of the text of laws. Meanings of citizenship are contested and strategically used in everyday meaning-making to fulfil different aims (Gibson, 2009, 2011; Gibson et al., 2018; Kadianaki & Andreouli, 2017). The approach adopted and developed in this work highlights the ongoing power struggles that may push towards homogeneity and control of the meanings of citizenship – through the reified meanings in the text of law (Castro, 2012) and through reification as a discursive device (Batel & Castro, 2009) –, while in contrast, citizenship as practice, can be characterized by diversity, plurality and transformation (Andreouli, 2019).

On the side of the consensual sphere, this work contributes with the analysis of how legally defining categories, particularly, the residency-by-investment category, was mobilized and subject of reification in everyday interactions. This is the case of the study of the representations in the press (Study 2) and the interviews with Chinese residents, including Chinese investment residents (Study 3).

This work thus stresses the importance of analysing mediated forms of communication in understanding how citizenship is being presented to the public and the debates surrounding it. In case of the press analysis (Study 2), the ways in which Chinese investment residents were presented in the press did not show the debated and contested nature of the meanings of citizenship. Instead, this configuration of citizenship was reified through depoliticisation, by emphasizing it as an ‘economic recovery tool’. The press took from sight any in-depth exploration of the consequences of a “selling citizenship” trend to the meanings supporting who is entitled of foreign residency and how.

However, the process of reification of the meanings of residency-by-investment took different forms in Study 3. The “taken for granted” perspective did not highlight the usefulness of such a programme for the recuperation of the Portuguese growth. Chinese residents accounts naturalized the proposals of the law, and its citizenship configuration, because it was seen to respond to the current globalized configuration of the world that is currently supporting new citizenship norms (Ong, 2006) – as a hegemonic social representation. They presented the residency-by-investment proposals of mobility as a sign of the times, comparing the old migration with the new migration as natural development of Chinese mobility in the world.

Yet, the Portuguese host society (Study 4) presented a different perspective in relation to the residency-by-investment law. The data suggested that - although more data collection is required to explore whether this is a reified perspective - other perspectives and understandings

are being co-created, stressing the threatening aspects (instead of the contributions like in Study 2) that the residency-by-investment may bring to society.

Overall, this work contributes, then, with a framework that can better incorporate the dynamics of transformation, contestation and stabilization – including, the role of laws and institutions in these transformations (Castro, 2012, 2019) – for the study of foreign residency as a fundamental part of the social psychology of citizenship in the context of migration.

*The social-psychological study of neoliberalism as part of common-sense*

The second contribution regards to the study of neoliberalism as a cultural repertoire that is part of today's common-sense (Hall & O'Shea, 2013). This would go against any attempt of neatly defining neoliberalism as a set of values and meanings (Springer et al., 2016). In social psychology specifically, research has been conducted to explore neoliberalism as a belief, or as an ideology (Bay-Cheng, et al., 2015; Bettache & Chiu, 2019).

This work considers more useful to look at neoliberalism as a political rationality that attempts to produce depoliticised meanings and subjects (Brown, 2015). This was particularly highlighted in the study of how the neoliberal policies, such as the residency-by-investment law, are being presented and discussed in the public sphere (Study 2). This was also showed in the study with interviews with Chinese residents (Study 3). We explored how neoliberal proposals of citizenship – fomented by a neoliberal law – were incorporated in everyday meaning-making.

For this analytical question we followed the literature of depoliticisation that describes it as one mechanism in which neoliberalism has been 'silently' incorporated in meaning-making. This is mainly done by articulating taken for granted assumptions as manifested in the ways in which economic policies and decisions are understood as technocratic - and not political decisions (Maesele, & Raeijmaekers, 2017; Wood & Flinders, 2014) or in the ways in which the (neoliberal) global market is unproblematically assumed to be the motor of development in the world (Carolissen, 2012; Massey, 2006; Prilleltensky, 2012). These 'taken for granted' assumptions have consequences for the ways in which citizenship is conceptualized both in the text of law and in the everyday.

Our empirical studies also showed that social representations theory and the concept of hegemonic social representations (Moscovici, 1988) through discursive strategies of reification (Batel & Castro, 2009) helps to explore the social-psychological processes that are making these depoliticised meanings avoid in-depth debate, or the incorporation of alternative perspectives.

Thus, a meaning-making perspective – such of social representations - is best aligned with the approaches that highlight depoliticisation as the process in which neoliberalism is seen as part of common-sense (Hall & O’Shea, 2013).

*A socio-psychological framework for the study of neoliberal citizenship*

The third contribution is to advance a framework for the analysis of meanings of citizenship that considers the interrelated role of the institutional and the everyday *in relation to* neoliberalism as a political rationality. This is a proposal that is particularly sensitive to the social inequalities and exploitations of globalization (Carolissen, 2012; Priletsky, 2012) that are often promoted as taken for granted configurations of its “inevitability” (Massey, 2006). Meaning-making practices are working to naturalize certain configurations of the world, and that includes the rights of foreign residents in the globalized landscape, producing inequalities and forms of exploitation that still require attention.

This work then proposes to investigate how different domains of citizenship are made sense through a neoliberal rationality, as a cultural repertoire that values migration in relation to their job market insertion (Mitchel, 2016) or investment capacity (Mavelli, 2018) devaluing any other form of work, or way of being (Anderson & Gibson, 2020; Lister, 2007;). These domains are: (1) the institutional dimension, i.e., the reified sphere, and how the neoliberal technologies are incorporated in the text of law; (2) the everyday dimension, the consensual sphere, where social representations of citizenship are being created and transformed through discourses of depoliticisation/normalisation of what constitutes the “good” foreign citizen as the *Homo Oeconomicus* (Brown, 2015) and (3) the placed dimension, where citizenship is being re-articulated within and beyond national limits through rights of mobility or “mobility regimes” that are responding to the dynamics of capital production and accumulation (Glick-Schiller & Salazar, 2013).

This work proposes that such a perspective best analyses the challenges to mobility brought by globalization as a global exchange of capital, goods, and people (Carolissen, 2012). Globalization, as fuelled by neoliberalism, invites the social psychology of citizenship to reflect on the dynamics of the local and the global – and how they are interconnected in everyday practices and in the construction and experience of citizenship. This tension is best summarized by the ‘ideological dilemma’ of the universal and the particular of “the nation in the world of nations” (Billig, 1995). How are borders and the particularities of nation-states maintained, while universal/global identities are being advanced, fostered and promoted?



The residency-by-investment programme is one example in which national policies were put into force offering free mobility to some foreign residents by offering the possibility of global/universal ways of enjoying citizenship. These residents are not held responsible to ‘maintain’ the integrity of borders, or the particularities of the Portuguese context because their presence is not mandatory. Yet, foreign residents by work, for example, are expected mandatory presence. For this group, permanence in place is thus legally contemplated to be the basis for residency rights. While there is normative pressure to produce global and universal identities to respond to needs of capital production and accumulation (such as the residency by investment), legal frameworks simultaneously require others to remain territory-bound (Massey, 1991).

The analysis of the Portuguese legal framework showed these dynamics (Study 1). The legal framework does not guarantee free mobility to *all* foreign residents. The legal emphasis is instead on individual responsibility and on foreign resident’s insertion in the job market (Mitchel, 2016) - regardless, for instance, whether an economic crisis is promoting staggering unemployment (Esteves et al., 2018), or if the foreign resident is an informal carer (Lister, 2007). Instead, laws in place expect the foreign resident to have in themselves the resources and strategies to climb the ladder of upward social mobility and reach the state of the consumer (Comaroff & Comaroff, 2001) so to then have access to geographical mobility privileges. This is a condition that the investment resident is expected to have since the beginning, according to the definitions of rights and duties contemplated in the law.

As everyday meaning-making, our empirical studies showed that socio-economic differences were taken for granted characteristics in predicting different mobility paths. The contribution of this work is not to assume that socio-economic status *is* the only proxy for analysing the workings of global capitalism in shaping migration and the psychosocial processes surrounding it. The advantage of approaching these processes as a meaning-making is that it allows to explore how neoliberal rationalities are guiding other meanings related to foreign residency and mobility. This is the case of how citizenship is commodified, but also, and eventually, how it is advanced in guiding moral and emotional decisions in relation to these issues (e.g., the opening corridors only for the *particularly vulnerable* refugees Mavelli, 2018) or how it is shaping cultural dynamics to respond to capital production and accumulation (e.g. the mobilization of diasporas for market competition Ong, 1999).

Consequently, this framework incites the analysis of ‘taken for granted’ assumptions for defending representations of citizenship in relation to foreign residency. This is particularly true for the domains in which mobility is understood to suppress local economic needs – and where

citizenship representations made sense of in relation to individual's capacity for production or consumption.

For example, the literature has identified factors that lead to positive intergroup outcomes, such as functional indispensability that relates to the participation in the economy (Guerra et al., 2015, 2016). However, research shows that it is an oversimplification to assume that such an understanding of groups of migrants necessarily lead to welcoming migrants and their rights (Gibson et al., 2018; Kadianaki & Andreouli, 2017). For instance, there are pitfalls of such a rhetoric of necessity surrounding the “need” for migrants to contribute to the economy by fulfilling jobs that local communities are not fulfilling. Research has showed that such instrumental view is not immune to dehumanizing perspectives by approaching the foreign resident as cheap labour, for example (Gibson et al., 2018).

The consequences of such instrumental views of migration were also evident in this work. The discourse put forward by the press was not able to articulate (other) challenges or alternative views of the common good (Moghadam, 2008). The press analysis greatly emphasized Chinese investment resident's absence and highlighted the economic advantages of the programme. But Chinese residents showed their active involvement with the local community, even though, in some cases, it was limited to international schools/spaces/environments. They advanced their citizenship rights in their mobile and cosmopolitan lifestyles (Study 3). The ways in which these foreign residents were initially presented in the press did not show or discuss other more complex and nuanced ways of enjoying citizenship rights in place by them. It also did not prepare the public for the consequences of such policies in place and in their everyday lives – a possible reason for explaining why the host society now sees them as threatening (Study 4). Such a monological and simplified understanding of residents by investment as presented by mediated forms of communication was not lived in practice. Instead, we can speculate how it became a debated and complex topic among the host society.

Moreover, the promises of a rapid economic recuperation by the implementation of the residency-by-investment programme might have fell short from the original expectations. Research on investment schemes in other locations have showed that the economic outcomes are far from the ones expected (Ley, 2003; Shachar, 2017). Some political parties now call for the complete extinction of the programme.

Future research needs to look at the mobilized meanings towards pro-migration rhetoric in general, and how it is emphasizing economic interests and needs that are not apolitical or inconsequential to the enjoyment of citizenship in place. Such discourses of acceptance – such

as the one presented in the press – requires an analysis of how citizenship representations are strategically mobilized, and what ends they are fulfilling (Gibson, 2009; Langhout & Fernández, 2018). Another example is of the support of migration to fulfil job-market needs resulting from aging populations in Western countries (Marois, et al., 2020). Usually such (political) positions assume the practicality of suppressing such ‘undeniable’ (economic) social struggles but fails to incorporate and discuss the citizenship claims by foreign residents themselves and the complex identity processes involved in their residency (Soysal, 1994).

Thus, this work argues that the dynamics of neoliberal citizenship are not only a matter of commodification of residency rights (also in accordance with Mavelli, 2018). It is a matter of unequal mobility rights and of the creation of a category of ‘elite travellers’ (Calhoun, 2002) and their consequences. It is also a matter of how such economic functions of migration are mobilized without incorporating the perspective of the Other.

### **10.3. Practical contributions**

This dissertation initial concern had been mainly theoretical in nature and aimed to explore the context-specific dimensions in the enquiry of social-psychological phenomena, in our case, of the meanings of citizenship rights of foreign residents. Some potential contributions here highlighted would require more research and development.

Regarding laws and expert mediating systems it was noticeable in our analysis how the bureaucratic apparatus of border services poses serious challenges to the regularization of foreign residents in Portugal. This comes from a country where the MIPEX (2021) index is quite high. But with the interviews with experts, it was possible to witness the difficulties that a bureaucratic state is posing in practice (also shown by research developed in Portugal, e.g. Ribeiro et al., 2014). In the analysis here presented we showed how such strategies help support the social representation of citizenship of effort – including, of sacrifice (Brown, 2016).

More research into these mediating systems is necessary, particularly, if the goal is to develop social and community interventions (Silka, 2018). It is in these moments of social and institutional (mis)recognition that individuals assess whether they are welcomed or not (Blackwood et al., 2015; Hopkins & Blackwood, 2011). As seen in Study 1, even though rights should be granted and are clearly stated in the law, some of the rights of foreign residents are not delivered because of institutional difficulties.

This work also proposes a reflection to the ways in which state institutions or mediated forms of communication – and to some extent, research on migration – are utilizing dichotomies between the ‘helpless’ and the ‘empowered’ to describe migration experiences (as seen in Study 1 and to a lesser degree in Study 3). Although legal frameworks rely on such categories for granting rights to different foreigners, discursively, these serve to reify expected experiences of the Other (Torkinton & Ribeiro, 2019). Research, however, has pointed the usefulness of understanding these dichotomies as continuums (e.g. forced-voluntary migration continuum Erdal & Oeppen, 2018) to show the complexities of foreign residents’ experiences that have consequences for their rights-claiming. For example, in Study 3, some of residents by investment explained their motives for mobility related to the staggering pollution levels of Chinese metropolitan cities, others claiming health-related motives to leave their cities of origin. The strict dichotomization between migration experiences - that is mobilized in the everyday and is legally contemplated - leaves undiscussed the ways in which similar mobility claims are being made among different categories/groups of foreign residents, and how they are understood to be fundamentally different. This categorization is a strategy that fails to accommodate how foreign residents live residency and mobility in complex ways (Di Masso et al., 2019) by legitimizing that this complexity is only ‘acceptable’ in relation to the elites (Calhoun, 2002).

#### **10.4. Limitations and future research**

The impossibility of conducting a focus group with the host society (COVID-19) to better prepare Study 4 (survey with host-society) is one limitation of this study. In doing so it would have made it possible to explore the social representations of citizenship helping to shape the struggle and debate of the usefulness of such a national policy of foreign residency. It would have also been an opportunity to explore whether place-related dimensions were helping construct an understanding of a deterritorialized proposal of citizenship.

Yet it was possible to show that the public is constructing other alternatives than the ones that the press was constructing. More research is required on the perspective of the host society, particularly in light of the recent public scrutiny, and in relation to the legal changes that some perspectives consider to be ‘the end of the programme altogether’. New residents by investment can no longer purchase property in the metropolitan areas of Lisbon and Porto, where the investment would be more profitable in the long-term.

More research is also needed to explore the tensions and dilemmas that are being expressed in place, where the local/territorial and the global (deterritorial) versions of citizenship become inevitably prominent in the relationship between foreign residents and local communities (Zisakou & Figgou, 2021). An aspect, however, that was not analysed in this dissertation, but that future studies should explore in more detail: how everyday interactions between foreign and local communities in context of commodified citizenship are being manifested *in* and about place and in the everyday of urban areas.

It is also a limitation of this work the impossibility of interviewing other residents by investment that were in fact living in China most of the time, and only spending the mandatory stay in Portugal (7 days/14 days). This work lacked the perspectives of the other investment residents that were in fact absent in place, and so we were not able to analyse how citizenship representations were being constructed and mobilized in such circumstances. How does the purchase of property contribute to a sense of belonging and entitlement when foreign residents' physical presence is temporary – such is the case of investment residents, and also, other policies promoting such lifestyles, e.g., tax regime for non-habitual residents (tax exemption of 10 years) - is an important venue for research in the future (Torkinton, 2012).

Another limitation of this study is simultaneously its strength. This is related to the focus on neoliberalism as a political rationality and as a hegemonic social representation present in discourse of how the rights of foreign residents are made sense of. By doing so, it exposes the structures and systems that are helping to shape the rights of foreign residents but that nevertheless may divert the attention from the – necessary – neoliberal alternatives.

Some scholars claim that a political rationality understanding of neoliberalism hinders the theorization and practice of resistance or in the creation of alternatives (Cornelissen, 2018), i.e., the focus on the systems of exploitation and inequalities may divert a more definitive focus on the alternatives to such systems. Instead, the “creation, production, innovation” of societies may become less visible and discussed if the emphasis on neoliberalism's workings is kept (Purcell, 2016). Although these are valid concerns, they are made in a context in which much has been said and explored about the ways in which neoliberalism - as embedded in a post-political framework - is hindering democratic practices and debates (Springer, et al., 2016).

Still, for social psychology, the focus on neoliberalism is a recent endeavour. Only in 2019 a special issue was dedicated to the topic of neoliberalism (see Bettache & Chiu, 2019), and other recent essays were published to explore how neoliberalism is orienting the consumer culture that guides much of social psychology's work (McDonald et al., 2017). Social psychology came rather late in acknowledging and exploring the ways in which neoliberalism

is shaping contemporary social-psychological dynamics, in comparison with other disciplines. This thesis shows that it might be too premature to decide whether neoliberal rationality is currently an obsolete concept/framework. This dissertation stresses fundamental processes in how meaning is constructed within such dynamics: the need to explore the institutional side, along with what is taken for granted and hegemonic, and to explore the mechanisms responsible for organizing and structure society and its inequalities (Castro & Mouro, 2016; Staerklé, 2015). By exposing and analysing these dynamics, it might be possible to open the dialogue about the inequalities that are the result of such grids of hierarchy and power dynamics (Negura et al., 2020) – a necessary step for building alternative representations promoting inclusiveness, solidarity, and care, in this case, in the reception of foreign residents more generally.

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## **ANNEXES**

## Annex A. Informed Consent and Interview Guide from Study 1 (Chapter 6)

### TERMO DE CONSENTIMENTO INFORMADO

A presente entrevista surge no âmbito de doutoramento a decorrer no ISCTE – Instituto Universitário de Lisboa, financiado pela Fundação para a Ciência e Tecnologia. Esta tem como objetivo compreender o dia-a-dia dos profissionais na integração de imigrantes. É por isso que a sua colaboração é fundamental.

A entrevista será realizada por Tânia Rita dos Santos (trsss@iscte-iul.pt) com a supervisão da Prof. Dra. Paula Castro (paula.castro@iscte-iul.pt), que poderá contactar caso deseje colocar dúvidas ou partilhar algum comentário.

A participação nesta entrevista é voluntária: pode escolher participar ou não participar, e pode interromper a participação em qualquer momento sem ter de prestar qualquer justificação. A participação é também anónima e confidencial: as informações partilhadas destinam-se apenas a análises de teor científico e nenhuma resposta será reportada individualmente. Pedimos para gravar a entrevista, para esta poder ser transcrita e analisada. Em nenhum momento do estudo precisa de se identificar.

Face a estas informações, por favor indique se aceita participar no estudo:

ACEITO

NÃO ACEITO

Nome: \_\_\_\_\_ Data: \_\_\_\_\_

Assinatura: \_\_\_\_\_

## **Guião de Entrevista**

Agradeço novamente a disponibilidade para dar o seu contributo para este estudo. A sua participação é muito importante, pois lida quotidianamente com as questões que vamos abordar.

Neste estudo queremos perceber a opinião dos profissionais que lidam diariamente com imigrantes em Portugal - com as leis de estrangeiros e nacionalidade e os desafios que colocam à integração.

*Apresentarei consentimento informado para participar neste estudo.*

Após a sua leitura e assinatura, começaremos a entrevista.

Relembro que a sua participação é voluntária, e toda a informação partilhada é anónima e confidencial.

Os principais temas a abordar e alguns exemplos de perguntas:

### **1. Trabalho nos Serviços**

- Gostaria de perceber melhor a sua história neste serviço (e.g. Quando é que começou a trabalhar neste serviço?)
- Gostaria de perceber melhor a sua rotina enquanto trabalhador/a deste serviço (e.g. Como é o seu dia-a-dia no serviço? Conte-me episódios ou histórias que me ajude a compreendê-lo)

### **2. Cidadãos estrangeiros em território nacional (exemplos de perguntas)**

- Quais são as dúvidas mais típicas pelos utilizadores do serviço? Ou as situações mais típicas que necessitam de aconselhamento?
- Qual a relação dos vossos serviços com o SEF?
- Como tem sido a aplicação das novas leis de residência no quotidiano? Como vê a agilidade do processo? Vê barreiras à sua aplicação? Tem sugestões de melhoria?
- Como é que as leis de residência contribuem à inclusão dos imigrantes em Portugal? Tem sugestões de melhoria estas leis?

### **3. Os imigrantes Chineses em Portugal e uso de serviços (exemplos de perguntas)**

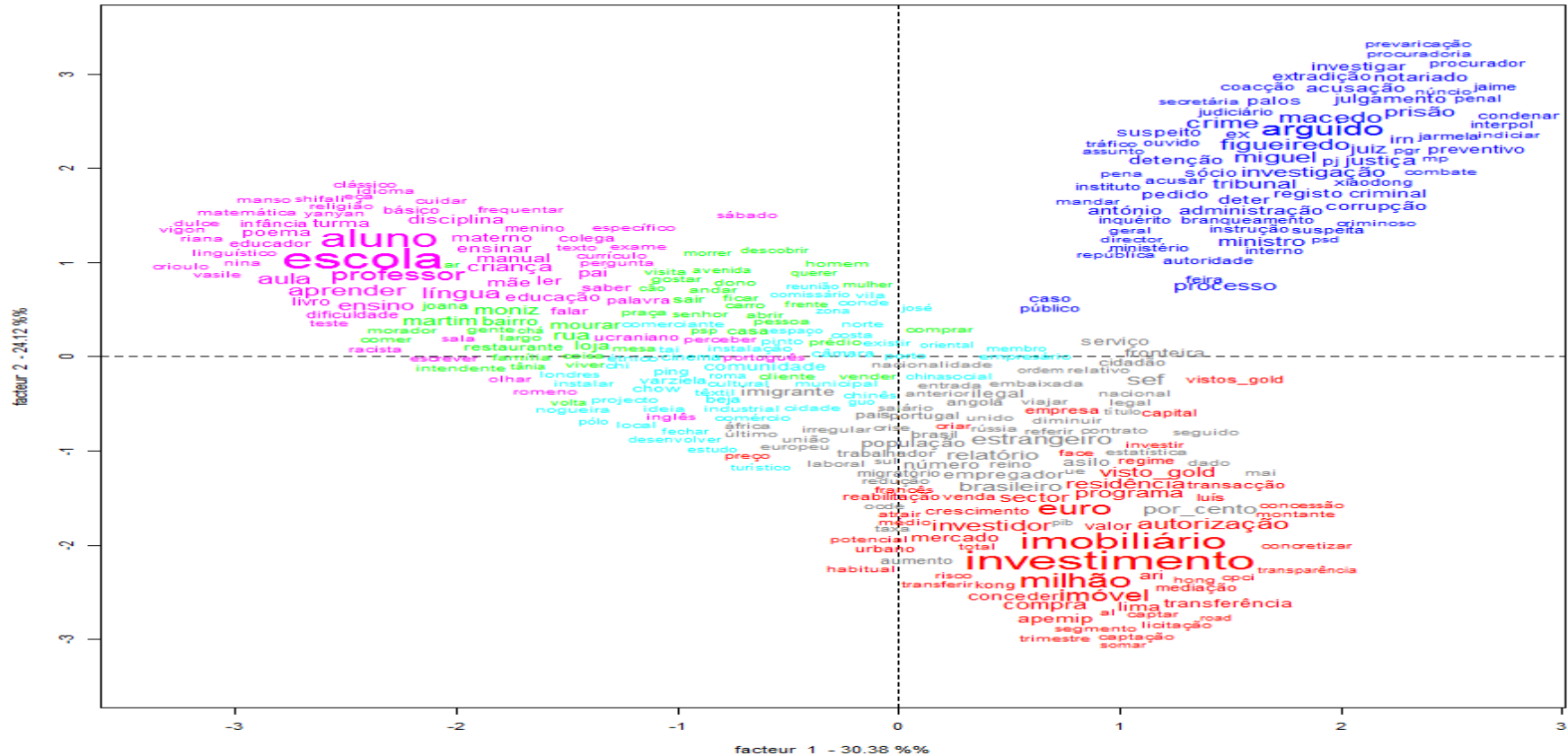
- Já viu imigrantes chineses a utilizar estes serviços? Pode contar-me episódios de como esta interação aconteceu?

- Que tipo de situações/dúvidas são as mais recorrentes?

*Obrigada pela sua participação. Para mais informações ou dúvidas que possam surgir, não hesite em contactar [trsss@iscte-iul.pt](mailto:trsss@iscte-iul.pt)*

# Annex B. Original IRaMuTeQ output from Study 2 (Chapter 7)

Original IRaMuTeQ output of the Factorial Correspondence Analysis - *Público*







## Annex C. Frequencies and Sub-categories of Arguments from Study 2 (Chapter 7)

Detailed Table with number of arguments in favour of or against residency by investment according to sub-category type

	<b>Economic Values</b>	<b>n</b>	<b>Citizenship Values</b>	<b>n</b>	<b>Total</b>
<b>In favour</b>	1.It brings large sums of money to Portugal	83	1.It allows free movement in Europe/World	2	
	2.It incentives urban rehabilitation	10	2.No desire for an attachment in the host country	4	
	3.It is good for Portuguese enterprises	10	3.Gives investors better quality of life	2	
	4. It is responsible for real estate development	70	4. Stimulates Chinese migration	1	
	5.It helped to overcome the financial crisis	8			
	6.It promotes job-creation	6			
	7.It contributes to scientific and cultural activities	5			
	8.It promotes the internationalization of the Portuguese market	20			
	9.It contributes to economic growth	10			
<b>Sub-total</b>		222 87.1%		9 3.5%	231 90.6%
<b>Against</b>	1.Investment is only going to one sector	2	1.Rehabilitated city with no citizens	1	
	2.Investors are not interested in the Portuguese economy, but the European one	1	2. It waivers citizenship requirements for residency application	1	
			3.Allows the free movement of potentially dishonest people	10	

		4. Attracts the Chinese, but this diversity is undesired	1	
		5. Citizens are not treated equally	1	
		6.It promotes criminal actions (e.g. corruption)	6	
	3		21	24
<b>Sub-total</b>	1.2%		8.2%	9.4%
<b>Total</b>	225		30	255
	88.2%		11.8%	100%

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## Annex D. Informed Consent and Interview Guide from Study 3 (Chapter 8)

### (English Version) Informed Consent Form

The interview for which you are being asked to participate in is part of a research Project developed at ISCTE-IUL – Lisbon University Institute funded by the Portuguese Foundation for Science and Technology. The main goal for this study is to understand the experiences of Chinese nationals in Portugal. Your participation is deeply appreciated.

Your participation in this interview is **voluntary**: you can choose to participate or not to participate, at any time you may notify the researcher that you would like to stop the interview with no justification. Your participation is also **anonymous** and **confidential**: the shared information aim for scientific analyses only, and no responses will be individually reported. We ask to record the interview, to proceed with transcription and analysis. There will be no moments in the interview in which you will be required to identify yourself.

If you have any questions or concerns, please contact the researcher Tânia R. dos Santos ([tania.rita.santos@iscte-iul.pt](mailto:tania.rita.santos@iscte-iul.pt)) or her supervisor Prof. Paula Castro ([paula.castro@iscte-iul.pt](mailto:paula.castro@iscte-iul.pt))

According to the information above:

I choose to participate in this interview

I withdraw from participating

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**(English Version)**

**Interview guide**

Thank you for accepting to participate in this interview. I am a PhD candidate at ISCTE-IUL and I am studying the Chinese migration to Portugal. I am interested in knowing more about your experience in Portugal.

**General life in Portugal (some examples)**

1. When did you get to Portugal? How has it been?
2. What made you decide to live in Portugal?
3. What are the biggest differences between living in China and in Portugal (or other places)?

**Portuguese institutions**

4. I am interested to know more about you experiences with Portuguese institutions, especially SEF –
  - a. Have you been to SEF? How was the experience?
  - b. What is/was the procedure to renew your residence permit? (if applicable)
  - c. Are you interested in applying for Portuguese nationality? Why/why not? (if applicable)

**Challenges for migration**

5. If you had a friend coming from China to Portugal, what advice would you give them?
6. Do you know other people in the same situation as you? What do they think of Portugal?
7. How do you see the Chinese community in Portugal?
8. What do you think the Portuguese people should know about the Chinese community that they do not yet know?

Thank you!

(Portuguese Version)

## TERMO DE CONSENTIMENTO INFORMADO

A presente entrevista surge no âmbito de doutoramento a decorrer no **ISCTE – Instituto Universitário de Lisboa**, financiado pela Fundação para a Ciência e Tecnologia. Esta tem como objetivo compreender a experiência dos Chineses em Portugal. A sua colaboração é fundamental.

A participação nesta entrevista é **voluntária**: pode escolher participar ou não participar, e pode interromper a participação em qualquer momento sem ter de prestar qualquer justificação. A participação é também **anónima** e **confidencial**: as informações partilhadas destinam-se apenas a análises de teor científico e nenhuma resposta será reportada individualmente. Pedimos para gravar a entrevista, para esta poder ser transcrita e analisada. Em nenhum momento do estudo precisa de se identificar.

Se surgir alguma questão ou pedido de esclarecimento pode contactar a investigadora Tânia R. dos Santos ([tania.rita.santos@iscte-iul.pt](mailto:tania.rita.santos@iscte-iul.pt)) ou a supervisora Prof. Paula Castro ([paula.castro@iscte-iul.pt](mailto:paula.castro@iscte-iul.pt))

Face a estas informações, por favor indique se aceita participar no estudo:

ACEITO

NÃO ACEITO

Data: \_\_\_\_\_

Assinatura: \_\_\_\_\_

**(Portuguese Version)**  
**Guião de Entrevista**

Obrigada por participar nesta entrevista. Sou uma aluna de doutoramento do ISCTE-IUL e estou a estudar a imigração Chinesa em Portugal. Estou interessada em saber sobre a sua experiência acerca da sua vida em Portugal.

Vida em Portugal

1. Quando é que chegou a Portugal? Como tem sido?
2. Como foi a sua decisão de vir para Portugal?
3. Quais são as maiores diferenças entre viver na China ou em Portugal (ou outros locais)?

Instituições Portuguesas

4. Estou interessada em saber mais sobre a sua experiência com instituições Portuguesas, especialmente o SEF –
  - a. Já estiveste no SEF? Como foi a tua experiência?
  - b. Como foi o procedimento para renovar o teu título de residência? (se aplicável)
  - c. Está interessada/o em pedir a nacionalidade Portuguesa? Porque sim/não? (se aplicável)

Migração

5. Se tivesse um amigo a vir da China para Portugal, que tipo de conselhos lhe daria?
6. Conhece mais pessoas numa situação semelhante do que a sua? O que elas/es pensam de Portugal?
7. Como é que vê a Comunidade Chinesa em Portugal?
8. O que é que acha que os Portugueses ainda não sabem sobre a comunidade chinesa, que deveriam saber?

Obrigada!

## **Annex E. Informed Consent from Study 4 (Chapter 9)**

### **Consentimento Informado**

O presente estudo surge no âmbito de um projeto de investigação a decorrer no Centro de Investigação e de Intervenção Social (Cis-iul) no ISCTE – Instituto Universitário de Lisboa, financiado pela Fundação para a Ciência e Tecnologia (SFRH/BD/117849/2016). O estudo tem com objetivo conhecer a opinião geral relativa aos residentes Chineses em Portugal.

O estudo é realizado por Tânia Rita dos Santos (trsss@iscte-iul.pt), que poderá contactar caso pretenda esclarecer uma dúvida ou partilhar algum comentário.

A sua participação no estudo, que será muito valorizada pois irá contribuir para o avanço do conhecimento neste domínio da ciência, consiste em ler um pequeno excerto e responder a um questionário que durará cerca de 15 minutos. Não existem riscos significativos expectáveis associados à participação no estudo.

A participação no estudo é estritamente voluntária: pode escolher livremente participar ou não participar. Se tiver escolhido participar, pode interromper a participação em qualquer momento sem ter de prestar qualquer justificação. Para além de voluntária, a participação é também anónima e confidencial. Os dados obtidos destinam-se apenas a tratamento estatístico e nenhuma resposta será analisada ou reportada individualmente. Em nenhum momento do estudo precisa de se identificar.

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Declaro ter compreendido os objetivos de quanto me foi proposto e explicado pela investigadora, ter-me sido dada oportunidade de fazer perguntas sobre o presente estudo e para todas elas ter obtido resposta esclarecedora, pelo que aceito nele participar.

- Sim, declaro que li o consentimento informado e pretendo participar no estudo.
- Não pretendo participar no estudo.

## **Annex F. Vignettes from Study 4 (Chapter 9)**

### **Residency by Work**

Por favor leia o seguinte texto sobre a Lei de residência que permite a permanência de cidadãos chineses em Portugal

Em Portugal, o trabalho por conta de outrem ou por conta própria permite a residência de cidadãos Chineses. A residência é-lhes concedida se tiverem uma atividade profissional que garanta meios de subsistência. A Lei de residência exige que estes cidadãos permaneçam no território mais de 6 meses durante um ano para não perderem o seu direito à residência.

### **Residency by Investment**

Por favor leia o seguinte texto sobre a Lei de residência que permite a permanência de cidadãos chineses em Portugal.

Em Portugal, o investimento é motivo para a residência de cidadãos Chineses. A residência é-lhes concedida se investirem em uma de várias áreas, como no imobiliário (de valor igual ou superior a 500.000 euros). A lei de residência exige que estes cidadãos permaneçam no território pelo menos 14 dias durante um ano para não perderem o seu direito à residência.

### **Chinese Geography**

Por favor leia o seguinte texto sobre geografia Chinesa.

A Montanha Hua está situada na cidade de Huayin, a 120 quilómetros da cidade de Xi'an, na China. A montanha está localizada perto do canto sudoeste da plataforma de Ordos, onde o Rio Amarelo descreve um amplo meandro, na parte sul da província de Shaanxi. A montanha Hua tem 5 picos, o mais alto é o pico sul com 2,154.9 metros e faz parte de uma importante cordilheira na China central, as montanhas Qinling.



## **Annex G. Debriefing from Study 4 (Chapter 9)**

Fim!

Muito obrigado por ter participado neste estudo. Conforme adiantado no início da sua participação, neste estudo estamos interessados nas atitudes em relação aos residentes chineses em Portugal. Mais especificamente, este estudo pretende perceber como é que as leis portuguesas de residência estrangeira se relacionam com as atitudes em relação a esta comunidade residente.

Para tal, pedimos a alguns participantes que lessem pequenos textos sobre a lei de residência e a outros que lessem sobre um tema não relacionado. A informação apresentada nesses excertos era verdadeira, como pode ser comprovado na atual lei de residência de estrangeiros - Lei 23/2007 de 4 de Julho e subsequentes alterações – no diário da república eletrónico (<https://dre.pt/home/-/dre/635814/details/maximized>). O texto sobre o tema não relacionado foi inspirado pela seguinte página da web [https://en.wikipedia.org/wiki/Mount\\_Hua](https://en.wikipedia.org/wiki/Mount_Hua).

Este questionário pretende também avaliar se os residentes chineses em Portugal estão a ser culpabilizados pela transmissão do coronavírus (SARS-CoV-2), cabendo-nos reforçar que não há evidência para esta culpabilização. A Organização Mundial de Saúde alerta que essa culpabilização compromete o bem-estar das pessoas culpabilizadas, bem como a coesão necessária para combater a pandemia (<https://www.who.int/publications/i/item/social-stigma-associated-with-covid-19>).

Reforçamos os dados de contacto que pode utilizar caso deseje colocar uma dúvida, partilhar algum comentário, ou assinalar a sua intenção de receber informação sobre os principais resultados e conclusões do estudo: Tânia Rita dos Santos ([trsss@iscte-iul.pt](mailto:trsss@iscte-iul.pt)), Paula Castro e Rita Guerra.

Mais uma vez, obrigado pela sua participação.