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A Study on the Aesthetics of Illustrations in Third and Fourth Graders' Chinese Textbooks

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Abstract
Textbooks are one of the most important tools for learning. Illustrations in a textbook can have critical influence on students' understanding of the text and their interest in learning. However, studies on illustrations in a textbook in Taiwan are scarce. On this account, this study developed a list of aesthetic principles to examine illustrations. It aimed to explore and compare the types of representation of these illustrations and their corresponding principles of aesthetics in versions A and B of third and fourth graders' Chinese textbooks.

Keywords: Aesthetic Principles, Aesthetics of Illustrations in Chinese Textbooks, Content Analysis of Textbooks

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Introduction

Textbooks are one of the most important tools for learning. Illustrations in a textbook can have critical influence on students' understanding of the text and their interest in learning. However, studies on illustrations in a textbook in Taiwan are scarce. Only recently has Taiwan begun to pay close attention to the aesthetics of the design of textbooks. The emergence of "Aesthetic Cell: Recreation of Textbooks Program" in 2014 led us to believe that "a textbook is like a museum," with students inspired to develop a sense of aesthetics, thus becoming individuals who know how to think freely and embrace a greater perspective of space (The News Lens, 2018). On this account, this study developed a list of aesthetic principles to examine illustrations. It aimed to explore and compare the types of representation of these illustrations and their corresponding principles of aesthetics in versions A and B of third and fourth graders' Chinese textbooks.

Traditionally, an "illustration" refers to any image embedded within the space of an article; it helps to visualize the meaning that can be difficult for readers to understand fully. Today, an "illustration" has not only become a carrier that conveys message via visual signs, but also is expected to convey a broad array of concepts, from words to connotations, incidents, and commodities. Overall, illustrations can be very helpful in the following aspects: arousing students' interest and motivation, improving their understanding of the theme and text, helping them memorize key points, and developing their ability in mastering aesthetics and competencies. The present study presents five types of illustrations commonly seen in Taiwan's textbooks, using the previous literature and research results: character portrait illustrations, landscape illustrations, storyline illustrations, image explanatory illustrations, and decorative illustrations.

After exploring literature related to aesthetic principles, this study chose five of these principles that meet educational goals and are frequently discussed, for an analysis. They are proportion, contrast, proximity, harmony, and unity.

Table 1. An introduction to aesthetic principles

Aesthetic principles	Content
Proportion	The relationships between parts and the whole, or between parts and parts, which can be presented under the concept of "number": golden proportion, module, and human organic proportion. This helps to control the atmosphere of space.
Contrast	Two contrastive elements are placed together to achieve a dynamic result. This can be divided into three levels: strong, medium, and slight, while attracting audiences' attention.
Proximity	The correlated items are put in order by clusters, whereas a visual direction is established to emphasize the order of the work. Margins are inserted in the space to create a spacious feeling.
Harmony	It is also called "balance," which refers to a state where two or more elements are harmoniously placed together using symmetrical or asymmetrical techniques to bring out a sense of calmness.
Unity	By incorporating related parts (parts and parts or parts and the whole), this method helps to produce a major tone from individual content, thus creating a sense of aesthetics for spectators.

Research Design

Based on the five aesthetic principles, this study analyzes and compares versions A and B of illustrations and format designs of third and fourth graders' Chinese textbooks in the 2017 academic year; the structure of this paper is created via research purposes and questions.

This study adopts the content analysis method. Formulas are as follows:

Percent agreement (P):

$$\text{Percent agreement} = \frac{2M}{N1 + N2}$$

Reliability of rater (R):

$$\text{reliability of rater} = \frac{N \times (\text{average percent agreement})}{1 + [(N-1) \times \text{average percent agreement}]}$$

M: the number of mutually agreed items
N1: the required agreed item of the first rater
N2: the required agreed item of the second rater
If there are more than two raters involved in the rating process, then "percent agreement" should be examined by pairs.
N: number of raters

Conclusion

Conclusions are as follows:

1."Storyline illustrations" are more frequently found in both versions, whereas "character portrait illustrations" and "image explanatory illustrations" are less discovered in them.

"Storyline illustrations" specifically express the plot of the text. It is the highest type of illustration used in the two versions. Since the main function of textbook illustrations is to help learners to better understand the text, it can make the meaning of the text more specific and improve students' understanding of the content. Therefore, this type of illustration is the most frequently used.

The less commonly used are "character portrait illustrations" and "image explanatory illustrations." The former is an illustration that uses characters as the main body of the picture and pays special attention to the role of the characters in the text. The latter is a specific illustration of the content that students cannot easily understand via their imagination. In terms of "character portrait illustrations," the content of elementary school textbooks and the topics are more diverse. Although there are biographies, they only account for a small number of lessons, and are placed in the rest of the learning stage based on the curriculum design of the publisher; they may be designed to complement the plot of the text in order to assist reading, instead of directly using characters as the main body of the picture. Therefore, from the perspective of the data of the research results, they only account for a small proportion. Regarding "image explanatory illustrations," while the text cannot fully explain the concepts for learning, substantiating abstract concepts is one of the important functions of illustrations. However, since the content of the text chosen by the publisher for third and fourth graders is not too difficult to understand, such illustrations are rarely used in the text.

2. Proximity and harmony principles are often used, whereas the principle of unity is less often used.

The two versions use the following aesthetic principles more often: "proximity" and "harmony"; they account for 40% and 30%, respectively. The analysis categories of these two principles include: "the accuracy of the illustration content," "the consistency in graphics and texts," "proper locations of graphics and texts," "the illustrations in the layout having a good visual trend arrangement," "the illustrations not overlapping with the text," "the color of the layout background not affecting reading," and "the similarity of illustrations in color." The functions of illustrations are mainly to assist understanding, promote learning, and trigger learning interest. Therefore, if illustrations can be solid, consistent with, and proximate to, the text, as well as visually fluid, easy to read, and providing readers with a sense of calmness, then they will enable learners to receive repeated messages and stimulate their learning to achieve better text learning results.

The less-used aesthetic principle is "unity"; both versions use it less than 10%. "Unity" can produce a major link between parts and parts, or between parts and the whole, so that the whole is in harmony, thus creating a sense of aesthetics for spectators.

However, as the lively and colorful layout can also attract readers' attention, the illustration design of the text can be drawn according to the needs of different contents, whereby the text presents different appearances.

3. The illustrations that "do not exceed more than one-half of the overall length" account for about 70% in both versions.

In the "proportion" principle, according to the Grades 1-9 Curriculum Guidelines of the Ministry of Education, the proportion of the text and graphics in the first stage of the textbook should be half, and the second and third stages can be increased or decreased according to the actual needs of the curriculum. Third and fourth graders' textbooks cannot exceed one-half of the text and graphics ratios; there are about 70% of the "proportional graphics" in versions A and B, indicating that the two versions have taken into account the provisions of the Ministry of Education when designing text illustrations, as well as the appropriateness of the text ratio.

4. The two versions use "space design to present a blank design" more often, and "contrast of illustration size to show the focus of the layout" relatively less often.

The two versions use "space design to present a blank design" more often, accounting for 60%, and "contrast of illustration size to show the focus of the layout" relatively less often, accounting for about 30% and 10%, respectively. White design can separate text and highlight the theme, increase readers' attention and reading fluency, as well as reduce the visual burden when reading. Therefore, the blank space design is the most common type in the layout space.

5. Both versions pay more attention to "the accuracy of the illustration content" and "the consistency in the graphics and the text."

Both versions emphasize the "the accuracy of the illustration content" and "the consistency in the graphics and the text." Pictures, photos, or other images related to teaching materials, size, color, and even the context of things, should be as close to their originals as possible. This will then give students the correct knowledge and ideas so that they can use the representative visual information to transform the conceptual images in the teaching content into physical representative forms and access them in long-term memory. In addition, if the graphics and the text are highly consistent, students can easily learn the message to be conveyed in the textbook and feel the atmosphere to be created.

6. Both versions pay more attention to "the illustrations not overlapping with the text" and "the color of the layout background not affecting reading," but less to "the similarity of illustrations in color."

"The illustrations not disrupting the reader experience," "the illustrations not overlapping with the text," and "the color of the layout background not affecting reading" account for the highest proportion in both versions, whereas "the similarity of illustrations in color" account for the lowest. The layout of illustrations should not disrupt the clarity and reader experience. In other words, the illustrations cannot overlap with the text. Moreover, when it comes to "the color of the layout background

not affecting reading," the color of the background of a single page should not be blurred and interfere with the presentation of the text content; otherwise, it harms legibility. Lastly, while it is commonly believed that similar hues help to reduce visual fatigue and bring a sense of calmness to readers, more colorful illustrations help to accentuate the layers of the space of a text, and draw readers' attention to said text.

7. The consistency in style accounts for 60% in both versions.

In the analysis category of the principle of unity, "unification of painting style" in versions A and B account for about 60%. Unity can make seemingly contradictory items form mutual coordination, and then reveal a common inevitable relationship, so that the whole is in harmony, thus creating a sense of aesthetics for spectators. However, the lively and colorful layout can also attract readers' attention, so the illustration design of the text can be drawn according to the needs of different contents, whereby the text presents different looks.

Advice to publishers

1. The spacing between illustrations and related texts can be enhanced, and should be placed on the same page or next to the text.

According to the research results, about 80% of the illustrations conform to the principle of "proper locations of graphics and texts." In order for readers to have good visual trends and clearly understand the content of the text, proper locations of pictures and texts are of considerable importance. The 20% of the non-conforming illustrations reduce the effectiveness of illustration-assisted learning because students cannot focus on a certain thing for a long time when a text is far from an illustration. Therefore, this study suggests that publishers pay more attention to this problem.

2. The fluency of reading can be improved; the layout of illustrations should not overlap with the text, and the color of the background should not interfere with reading.

According to the research results, about 90% of the illustrations conform to the principles of "the illustrations not overlapping with the text" and "the color of the layout background not affecting reading." In order to enable readers to have good legibility and clarity when reading, the color of the background of a single page should not be blurred and interfere with the presentation of the text content. The illustrations should not overlap with the text content, either. The remaining 10% of the non-conforming illustrations are obscured by the illustrations, interfering with or overlapping with the darker background, making students unable to clearly identify them, which in turn affects the effectiveness of their learning. Thus, this study suggests that publishers pay more attention to this aspect in the future.

Suggestions for future studies

1. Compound illustrations can be added to the illustration types to make up for the lack of classification of illustration types in this study.

From the results of illustration type research, the proportion of "other illustrations" is relatively high, about 20%. To make the research more meticulous, the researchers believe that it is possible to add a "composite illustration" type of illustration. A "composite illustration" integrates some elements of character portrait, landscape, storyline, image explanatory and decorative illustrations, which are distinct from other illustrations, so as to prevent excessive "composite illustrations" from being classified as "other illustrations." This can make up for the deficiencies of this study.

2. Other aesthetic principles can be added to research tool, and their analysis categories can be expanded.

This study uses the five aesthetic principles: proportion, contrast, proximity, harmony and unity as analysis categories. Since different aesthetic principles may produce different analysis results, and different researchers have different preferences for the use of aesthetic principles, other aesthetic principles can be included and analysis categories added to make the research results more diverse and comprehensive.

Acknowledgements

Course Redesign: A Case of Critical Spiral Pedagogy

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Abstract

Designing courses that are meaningful to diverse learners and still align them to the goals of a university and its general education requirements is not a mean task. This course redesign project focuses on redesigning a course that we are currently teaching and outlines the spiral-reflective process that the instructors used to conduct learner and learning needs analysis, incorporating learners' input, and course redesign phases that were adapted from Dee Fink (2013). It also includes reflections of struggles and challenges faced by both researchers. One of the researchers is an Adjunct Instructor, and the other, a full-time Instructor in higher education. Those struggles and challenges were the major motivation behind this course redesign project. The major goal for this spiral-reflective project is advancing knowledge and providing new understanding of issues related to course design and instruction for learners from diverse backgrounds. The researchers sought to understand how to introduce non-linear approaches and a pedagogy that is integrated, using spiral and critical ways of learning into instruction within an environment of traditional Western linear methodologies of passive teaching and learning. Minority students continue to struggle to learn in higher education because the main model of instruction is based on a linear Eurocentric style of learning that does not integrate spiral or circular learning, diverse languages and codes of communication. The outcome of the study was a redesigned undergraduate college course in the African American and African Studies program at the Institute for Intercultural and Anthropological Studies.

Keywords: Critical Pedagogy, Spiral Learning, Diverse Learners, Course Redesign, Learners and Learning Assessment

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Introduction and Background

Designing courses that are meaningful to learners while still aligning them with the goals of a university and its general education requirements is a broad and very daunting task. This action research paper presents lessons learned by both researchers (one Adjunct and one Full time Professor) from their respective teaching experiences. Humans learn through a circular process of action, conceptualization and evaluation, referring to previous experiences as well as anticipating outcomes (Cross, 1981; Fink, 2013). Learning is in that sense a process of spiral reflecting, moving on, and turning into a new loop with new experiences and qualitatively new challenges.

Clarification about an Instructor's background is important in action research because what we experience as challenges might not be challenges for other instructors. Some of the struggles and challenges as it relates to delivery of learning are ever present in the classroom, and other spaces in higher education. The researchers have had students who appreciated their project-based learning but could not get over their accent, and rated them poorly because of that. Challenges faced include inner conflict at pre-course design phase, during the course design process, delivery and evaluation, including questions about how to know for sure what is meaningful to their learners and how to evaluate the whole process.

These struggles and challenges that the researchers face are not unique to them. They make suggestions and recommendations based on decades of experience, conversations with other immigrant Instructors and students, as well as observations that they believe have influenced them to design an approach to learning and instruction that supports multiple and different ways of learning. It is very important to take into consideration students' learning styles and backgrounds when creating and facilitating integrated spiral active learning and inquiry within inclusive environments. The use of inclusive spiral pedagogy ensures enthusiastic participation of students from diverse backgrounds who have different learning and thinking styles, as well as information acquisition, processing and decision-making styles.

Research Objective

This project is an endeavor to reflect and share the experience of redesigning an online college course that demonstrates an understanding of and application of theories and content of educational and instructional technology that focus on engaging with diverse learners. This course redesigning process is supported by the science of creating meaningful and significant instructional curriculum that is geared towards producing specific learning outcomes, based not only on pedagogical research, but also on current spiral pedagogy and inclusive instructional practices.

Target Audience

The goal of the researchers is to present a paper that can benefit other Instructors, Instructional Designers in higher education, as well as academic administrators and managers globally.

Justification

Action research in education is both critical and reflective, which served the researchers 'goal of sharing their lived experiences in classrooms (physical and virtual) that are found in predominantly Eurocentric environments. Online learning and discussion provides an opportunity for sharing of experiences amongst learners and between learners and instructors. Most online courses, however, are designed as if they were a replacement of the traditional face-to-face teacher led instruction.

Problem Statement

Most online courses that the researchers have experienced at Western Michigan University were designed as if they were substitutes of the traditional courses. The traditional one size-fits-all approach to teaching does not cater to culturally diverse groups. Minority students continue to struggle to learn in higher education because the main model of instruction is based on a linear Eurocentric style of learning that neither integrates spiral or circular learning, nor diverse languages and codes of communication.

As outlined in the introduction, the researchers' struggles as Instructors in higher education are many. The focus of this project is the main challenges and struggles of using a non-linear approach and pedagogy that is integrated, spiral and critical while managing learning and communication issues in the classroom of learners that are predominantly and almost always surrounded by an environment that is Eurocentric and linear.

Research Questions

1.   How do we introduce non-linear approaches and pedagogy that is integrated, using spiral and critical ways of learning into instruction within an environment of traditional Western linear methodologies of passive teaching and learning?

2.   What is the holistic role of the instructor on the spiral process?

Literature Review

The major goal for this paper is advancing knowledge and providing new understanding of issues related to course design and instruction for learners from diverse backgrounds. The researchers are cognizant of the major goals of action research in education that include improving instruction design, delivery and the whole learning process and its environment. As this is a reflection of our experiences as Instructors in a predominantly Eurocentric environment, the literature reviewed was solely for instruction design from pre-design, design, delivery and post delivery phases as well as in the learning environment (the traditional face-to-face classroom or online) including instruction design theories, learner and learner needs.

Learning Theory and Epistemology

Professions and epistemological views almost always dictate pedagogic/andragogical approaches to learning and instruction. Since 21st century learners do not have similar

educational and or knowledge construction backgrounds, in addition to being meaning makers, the researchers design their courses in a way that ensures that the learners can access information and learning contexts anywhere, anytime. They avoid the traditional one-size-fits all learning approach, and use a design of learning that is learner-centric as much as possible. This ensures that learners feel that the content and assessment has relevance for their lives.

Learning Styles

The major learning styles that this section of literature review will focus on include Linear (or Modular), Cyclical (or Spiral), and Holistic. Linear seems to be the primary way of teaching and learning in Western culture and is therefore commonly used and widely recognized for designing and evaluating learning expectations and qualifications. Cyclical or Spiral, which will be the adopted design approach in this project, is the traditional method of teaching and learning in tribal and indigenous cultures around the world. Holistic is a most common way of teaching and learning in the Orient, although with Western adaptations (Fink, 2013; Knowles, 1984; 1980; 1975).

According to Knowles (1984; 1980; 1975), adult learning, or andragogy, is a process of drawing connections between what is already known or understood and new information. The researchers made the following assumptions about the design of learning and instruction for adults as presented by Knowles and further developed by Cross. They based their assumptions on social constructivist theory and andragogical approach. (1) Adults need to know why they are learning something and are motivated to learn by internal factors, (2) Adults need to learn experientially, (3) Adults approach learning as solving real world problems, and (4) Adults learn best when the topic is of immediate value (Cross, 1981; Knowles, 1984; 1980; 1975).

The researchers adapted the following process as shown in figure 1 and 2.
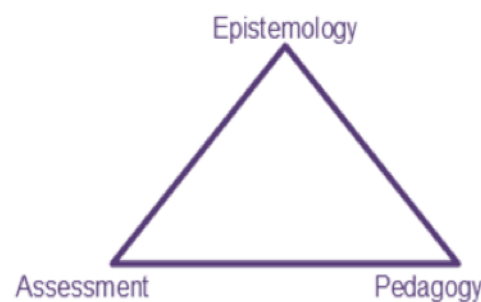
Figure 1: Integrated Design (adapted from Fink, 2013).

Instructional Design Theory and Strategy

Fink (2013), from a constructivism approach, defines instructional strategy for significant learning as a set of learning activities, arranged in a particular sequence so that the energy for learning increases and accumulates as students go through the sequence and learn from each other as they share and exchange ideas. He suggests some inter-related steps that include analyzing the situational factors, formulating learning goals, designing feedback and assessment procedures, and eventually selecting teaching/learning activities that are interlinked and looped back to the major

theme. He asserts that "what students learn become part of how they think, what they can and want to do, what they believe is true about life, and what they value," (p.7).

A TAXONOMY OF SIGNIFICANT LEARNING

LEARNING HOW TO LEARN
Becoming a better student
Inquiring about a subject
Self-directing learners

FOUNDATIONAL KNOWLEDGE
Understanding and remembering:
    Information
    Ideas

CARING
Developing new
    Feelings
    Interests
    Values

APPLICATION
Skills
Thinking:
    Critical, creative, &
    practical thinking
Managing projects

HUMAN DIMENSION
Learning about:
    Oneself
    Others

INTEGRATION
Connecting:
    Ideas
    People
    Realms of life

Figure 2: Creating Significant Learning Experiences: An integrated Approach to Designing College Courses (Adapted from Fink, 2013).

Instructional Design is the systematic development of instructional specifications using learning and instructional theory to ensure the quality of instruction and involves analysis of learner and learning needs, learning environment and context as well as learning and evaluation goals and including the development of a delivery or instruction system to meet those needs. Reiser (2002) reiterates the same as he approaches instructional design as "the theory and practice of design, development, utilization, management, and evaluation of processes and resources for learning" (p. 1).

From the literature that we just reviewed, if instructional design is the systematic process of designing, developing, evaluating and managing the entire instructional process to ensure effective and efficient learning, then what is the role of the Instructor? An Instruction Systems Designer can do all these steps as presented here. What then, is the Instructor's role? This, along with designing courses that do take into consideration not only diverse learners' learning styles, but also their background, prior knowledge and lived experiences are the gaps that we are trying to fill in this research.

Researchers' Reflection

As accomplished Instructors, the researchers constantly reflect and assess the effectiveness of the classroom interactions with learners, specifically, what goes on in the classroom in order to either adjust or modify/redesign the teaching plans accordingly. The Instructors have been successful at working collaboratively with the learners to select methods, materials, and resources for instruction, by using mid and

end of semester course evaluations to solicit such information. The spiral-reflective process is embedded in this project at every phase of the process.

Course evaluations have become a great source of information that can be used for this process. By reflecting on and evaluating instruction and learning practices, Instructors can develop ways to change and improve the learning process and environment. The following sections focused on the design process and our reflections. The outcome of this spiral-reflective and action research is shown on Appendix 1.

Instructional Design Process

One major question that the researchers struggled with was how to implement the changes they felt necessary for creating significant learning for diverse learners. Flipping the classroom using an integrated spiral (non-linear strategy) model aligned with critical indigenous pedagogy and other ways of knowing and learning that is not sequential but is a continuous relational endeavor was adopted to design the sample course (appendix 1). The goal is to create significant learning experiences in a learning space/environment where student agency and critical consciousness can be fostered in a way that grows knowledge and expertise in a given subject (Fink, 2013; Reiser, and Dempsey, (Eds.) 2002).

After experimenting with Fink's suggestions of an integrated and cyclic approach, the researchers decided to adapt his model, diagrammatically as follows (p. 74-119):
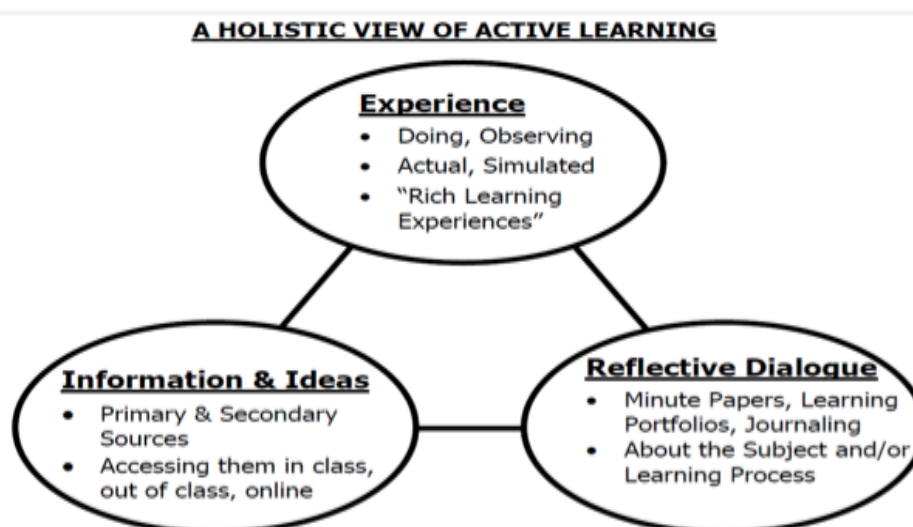
Figure 3: The 12 steps that Fink recommends to achieve an active spiral approach include:

1.   Identifying important situational factors (For example, prior knowledge, characteristics of the Learners and their preferred learning styles);
2.   Identifying important learning goals (For example, thinking or application abilities you want them to develop or they are interested in developing);
3.   Formulating appropriate feedback and assessment procedures (For example, demonstration of achievement of the learning goals);
4.   Selecting effective instructional strategy for teaching/active learning activities and rich learning experiences, in-depth reflective dialogue;

5.   Making sure the primary components are integrated (consistent with all the learning goals, feedback and evaluation);
6.   Creating a thematic structure for the course;
7.   Selecting or creating an instructional strategy;
8.   Integrating the course structure and the instructional strategy to create an overall scheme of learning activities;
9.   Developing the grading system;
10.   De-Bugging possible problems;
11.   Write the course syllabus;
12.   Planning an evaluation of the course and of your teaching;

Although the researchers used Fink's 12 steps (above) and holistic active learning (Figure 3) because they incorporate "rich learning experiences" and "reflective dialogue," none of them include students' lived experiences. That becomes problematic in inclusive course design because Eurocentric curricula have traditionally excluded the experiences of people who are not White. At its core, Eurocentricity places other ways of knowing at the periphery. By doing so, it completely alienates and devalues the everyday lived experiences of minority learners. Spiral critical pedagogy allows for leveraging techniques that give voices to those groups that are most usually suppressed, excluded or oppressed as discussed earlier.

In line with spiral active learning philosophy and prioritizing collaboration, learners were involved in the design process, and their responses used as an input and as part of knowledge construction (Figures 4-6) by listening to and including learners' knowledge and perspectives in class, making connections between school and the broader community, making connections between course content and learners' prior knowledge and lived experiences, as well as posing problems to students that encourage them to question assumed knowledge and understandings. It acknowledges that all learning in the 21st century is a hybrid that integrates learners' digital lives into their digitally-enhanced or fully online learning experiences (Fink, 2013; Knowles, 1980; Rahman et al, 2019).

The role of an instructor in active spiral learning is that of a facilitator. It is a common role by default and not choice, for minority Instructors to find themselves serving as role models and coaches. When facilitating face-to-face learning, it is suggested that one encourages learners to use their phones and laptops as part of the learning process, to minimize distraction because no matter how Instructors try to restrict the usage of electronic devices in the classroom, learners will always find a way to still use them. Incorporating short interludes where Instructors allow the learners to use their devices to connect with the course content, teaching them to "unlearn" some biased knowledge that is inherent in the Eurocentric worldview, encouraging community building, can be done bearing in mind that the learners' fingers will be itching to thumb through their phones anyway. Why not incorporate learning into those new habits that are continuously becoming part of our lives? If otherwise left unattended, the learners get distracted and lost into their electronic devices and we lose most of them into activities that are unrelated to the learning activity at hand.

We believe that it is only when we bring our learners to understand that their personal experiences matter, that they can be active participants to their own education, empowered enough to critically examine their lived experiences in juxtaposition to other ways of knowing to attain a true and meaningful knowledge.

Research Methodology: The redesign process

Integrated Spiral and Active Learning

Using Fink's argument, and augmenting it with social constructivist learning theories, critical spiral pedagogy and methodologies, it follows that teaching is a cyclic model, and learning is an upward spiral. The model of higher education uses an upward spiral because education is continuous, and every level increases understanding. Each level of the spiral represents a level of knowledge, building up to a minor or major in a certain area of specialization. The scope and sequence of the content are developed such that concepts and skills are revisited at each grade level with increasing depth. That therefore, is the basis for this project to argue that, the same should happen in the specific courses and not just in the sequencing of degrees: the majors and minors.

Context Analysis of the Performance Setting

The reason why minority learners continue to struggle to learn in higher education was a constant question and theme in the design process. The researchers could not lose focus of the fact that their struggles and those of diverse and minority learners was mainly due to the challenge of learning (and instructing) in an environment where the main model of instruction is based on a linear Eurocentric style. Our aim was to as much as we could, introduce within that environment, an integrated spiral or circular learning that would cater for the learners' diverse backgrounds, languages and codes of communication.

The researchers had already found out from their classroom experience that the flexibility of online learning and its accompanying discussion boards provided an opportunity for sharing of experiences among learners and between learner and Instructor. Most minority learners felt comfortable sharing in that environment than in a face-to-face, where they are no longer conscious of their accents and lack of acceptance. They are in a private, brave and safe space.

According to Jerome Bruner (1960), selected curriculum should be delivered in such a way that it equips the learner with problem-solving skills and exposes them to the processes of inquiry and discovery, while the subject matter should be presented from the learner's way of viewing the world with grade levels embedded so that there is clear progression of mastery from one basic skill acquisition to becoming comfortable and eventually becoming expert.

Learning Needs analysis

Critical spiral pedagogical practices that were used for redesigning the sample course (Appendix 1) include listening to and including learners' knowledge and perspectives in class, making connections between school and the broader community, and posing

problems to students that encourage them to question assumed knowledge and understandings. It also included an assessment of the gap between the knowledge, values, beliefs, skills and attitudes that the learners currently possess and the knowledge, values, beliefs, skills and attitudes that they require to meet the course objectives. Consideration was based on knowledge about learners with diverse backgrounds and how they use different models of knowledge acquisition and construction.

Choice of online learning environment was selected because it is supportive of a diverse, spiral and inclusive pedagogy. Learner-centered instructional strategies and assessment tools to address the diverse needs and interests of all learners is easily accessible for online instruction to create, adapt and personalize learning experiences that foster independent learning and accommodate learner differences and needs.

Learner analysis

Researchers' involvement in this phase was minimal as they are not involved in the university selection for incoming students. After enrolling and joining the course, the researchers considered available data on learners' demographics, prior knowledge, physiological, affective and social needs since most of these areas shape design decisions and influence the instructional methods and strategies that are chosen for implementation.

The needs analysis approach adapted from Bloom's taxonomy of learning objectives and ADDIE Model of instruction design were used to diagnose and categorize and later evaluate learner needs and interests and to inform the design strategy. The course being redesigned is approved for a specific undergraduate level, and has met the requirements of the Essential Studies curriculum.

The ADDIE model of instruction design was originally developed by Florida State University to allow for analysis throughout the process, and represents the major phases of analysis, design, development, implementation and evaluation. Benjamin Bloom is famed for being in charge of the committee that structured learning objectives from low to high to allow for progress learning and evaluation. The famed objectives include remembering, understanding, applying, analyzing, and creating. For our design purposes we used levels of knowledge, comprehension, application, analysis, synthesis and evaluation (Bloom, 1956).

Learning Context Analysis

The University regulations and requirements for how an undergraduate course should look like and what requirements it should meet were used since it has to be in compliance with the Higher Education Commission guidelines. Since most Instructors design their courses in the absence of learners, their input, however indirect is crucial. Here presented are responses from some of the questions the learners were asked after the end of a course to solicit learner needs for the next course or to improve current one (University Course End Evaluations):

Ques. 1. What are the major strengths of the instructor/course?

Responses= 33.3%

➢   Discussions are very powerful.
➢   The major strengths of the course was the way we learned the global problems. This course has enables students to learn what caused the problem, who caused the problem and who can solve the problem.
➢   The couse didnt focus on assignments and book, but more so of learning and understanding with good discussions about global concerns. I like there was no right or wrong answer and people were allowed to speak freely.
➢   It was very easy for students like me to get engaged and share what we knew with the class. I like how having everyone speak brought different perspectives to the topics we learned about. I also liked how this class made world issues very real to us so that we can make a change in the world, even if it's on a more personal level.
➢   The instructor has many amazing stories and experiences to share with the class.
➢   We learned a great deal of information and the questions always made you think.
Ques. 2. What do you suggest to improve the course?
Responses = 47.2%
➢   Discussions every other week. I think more people would post.
➢   **Loved the teacher and she was my first ever Black Professor. This school lacks diversity in the variety of professors. Do better**.

Was the progression of the course logical and coherent from beginning to end? [No, Seldom ... Yes, Always]

1	2	3	4	5	Omitted	Mean	St. Dev
-	-	-	-	100% (3)	-	**5.00**	0.00

Did this course improve your understanding of concepts and principles in this field? [No, Not Much ... Yes, Significantly]

1	2	3	4	5	Omitted	Mean	St. Dev
-	-	-	-	100% (3)	-	**5.00**	0.00

The instructor's knowledge of subject was: [Poor ... Excellent]

1	2	3	4	5	Omitted	Mean	St. Dev
-	-	-	-	100% (3)	-	**5.00**	0.00

The instructor attempted to involve all students in classroom activities. [Strongly Disagree ... Strongly Agree]

1	2	3	4	5	Omitted	Mean	St. Dev
-	-	-	-	100% (3)	-	**5.00**	0.00

Figure 4: Ques. 3a.

Rate the course, instructional methods and instructor based on the following on a scale of 1-5. 5 being very satisfied and 1 being least satisfied:

Other students commenting on some of the media tools said:
➢   "I think that the Ted Talks for this module really helped me understand the concepts better because there were real-life examples and they were very engaging".

➢   I love this class simply because we can learn about the African American history which I wish we could have learned about throughout our elementary through high school years.

Some of the learners, on the section of "any other comments" made general observations about the university and diversity:

"I think WMU is passionate about showcasing diversity and inclusion within their learning environments, however in my experience it is just that showcasing…meaning that cultural diversity is not represented in the leadership on the faculty level therefore, different cultures are not prevalent."

Rating Scale Item Means

		1	2	3	4	5	
Rate the instructor's overall teaching effectiveness.							4.67
Rate the overall quality of this course.							5.00
How much have you learned in this course?							4.33
Was the grading system for the course explained?							4.33
The instructor seemed well prepared for classes.							5.00
The instructor promoted an atmosphere conducive to work and learning.							5.00
Do you feel course objectives were accomplished?							4.67
The instructor was a good classroom leader.							5.00
Was the instructor able to explain difficult material to your satisfaction?							5.00
How accessible was the instructor for student conferences about the course?							4.67
Was the progression of the course logical and coherent from beginning to end?							5.00
Did this course improve your understanding of concepts and principles in this field?							5.00
The instructor's knowledge of subject was:							5.00
The instructor attempted to involve all students in classroom activities.							5.00
How valuable do you consider this course?							4.33
How much do you feel you have accomplished in this course?							5.00

Figure 5: Ques. 3b: Overall Rating

The instructor seemed well prepared for classes. [No, Seldom … Yes, Always]

1	2	3	4	5	Omitted	Mean	St. Dev
-	12% (2)	18% (3)	24% (4)	47% (8)	-	**4.06**	1.09

The instructor promoted an atmosphere conducive to work and learning. [Strongly Disagree … Strongly Agree]

1	2	3	4	5	Omitted	Mean	St. Dev
6% (1)	12% (2)	12% (2)	18% (3)	53% (9)	-	**4.00**	1.32

College Core Items

Do you feel course objectives were accomplished? [No, Not At All … Yes, To A Great Extent]

1	2	3	4	5	Omitted	Mean	St. Dev
12% (2)	18% (3)	6% (1)	18% (3)	47% (8)	-	**3.71**	1.53

The instructor was a good classroom leader. [Strongly Disagree … Strongly Agree]

1	2	3	4	5	Omitted	Mean	St. Dev
6% (1)	12% (2)	6% (1)	6% (1)	65% (11)	6% (1)	**4.19**	1.38

Was the instructor able to explain difficult material to your satisfaction? [Almost Never … Almost Always]

1	2	3	4	5	Omitted	Mean	St. Dev
12% (2)	18% (3)	24% (4)	6% (1)	35% (6)	6% (1)	**3.38**	1.50

How accessible was the instructor for student conferences about the course? [Never Available … Available Regularly]

1	2	3	4	5	Omitted	Mean	St. Dev
-	6% (1)	29% (5)	24% (4)	41% (7)	-	**4.00**	1.00

Figure 6: Ques. 3c.

Other Qualitative Questions:
1.   What did this course teach you about yourself?

30% response rate

- Material taught resonated, was straightforward, and insightful.
- Black history is American history!

2.   What did you find most valuable about this course?

•   The Professor is willing to help us students and wants us to succeed. She has clear class structure and what she expects from students. The class discussions were great.
•   The perspectives taught me to have more empathy.

3.   Did this course teach you to interact with people who are different from you?

•   Yes, I have learned to be more open-minded, work more on not generalizing or stereotyping people.
Please, explain.
•   I have leaned more about myself.
•   I have learned how healthy relationships should work.

4.   Did the course lead you to question some of your knowledge, deep-seated beliefs and values?

•   Yes, and in the most best possible way.
Please, explain
•   This course has taught me to look outside of the box and truly be mindful of what I absorb.

Conclusion

In this project, the researchers endeavored to redesign an online college course in the African American and African Studies program.   We have shared our experience and reflections of the spiral-reflective process that we used in redesigning as well as its outcome (appendix 1) and suggested a spiral pedagogy and inclusive instructional approach.

We made the argument that the Eurocentric linear pedagogy is inadequate and in some cases detrimental to learners who are from backgrounds that are often viewed as different.   Indeed, as educators, we ought to take into account the concepts of intersectionality and positionality to ensure that we do not only reach, but most importantly, that we do include all of our learners, in the instruction design and learning process.

The spiral pedagogy and the spiral-reflective process that we are recommending, seem to lend themselves to a more inclusive classroom where other ways of knowing are explored in the spirit of making the learning process more inclusive and accessible to all learners, notwithstanding their race, ethnicity, gender, sexuality, country of origin, and other diverse aspects. Designing courses that primarily center around learners' lived experiences and cater to their learning skills tend to engage learners more in the learning process, as they find those courses more relatable. Moreover, designing courses that make the concepts of learning outcomes and assessment of those learning outcomes as a core component of the design process are more likely to place learners at the center of not only knowledge acquisition, but also of its production.

Our goal as researchers of non-linear approaches and pedagogy that is active, integrated, spiral and yet critical, is to make recommendations that will benefit other Instructors, Instructional Designers in higher education at a global level, academic administrators and managers. It is our hope that the adoption of pedagogy and instruction methods that are inclusive will not only benefit our learners but will also benefit all parties involved in the learning process. Although action research was used to some extent, the main method was spiral-reflection aimed at improving instruction design and the learning process as a whole.

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Appendices

Appendix 1: Redesigned Course sample

Redesigned Course Using Module One As Sample

Module 1 title: Dimensions of Black Consciousness and Identity

Main themes: Defining terms; Identity Politics; science and technology's impact on shaping race and racism.

Course goal: To think critically, read, understand and analyze content, class text and videos based on themes about African Americans and Africans in the USA and their experiences.

Objectives

• Exploring factors and dimensions of identity and how that affects one's level of consciousness.
• Analyze how intersecting identities and previous experiences have shaped not only the US experiences, but also the everyday strategies of how Blacks resist in America and throughout the world.
• Create a learning community.

Learning Outcomes

The learner will:
• Define terms and concepts associated with African Americans and Africans.
• Define terms and concepts associated with Black identity and consciousness.
• Explore theories and other ideas about the study of Africans in America.
• Demonstrate a basic understanding and start to express their opinion about their level of consciousness and thoughts on their identity.
• Post a personal reflection on the main theme of Module 1 and respond to classmates on assigned topic.

Activities, Instruction and Media strategy

Guiding questions

One classical goal of studying African American and African studies is that it is an **Agent of Empowerment for Student Development-** How true is this for you? How has this module helped you understand/get insights about your identity? Should such a curriculum be integrated into the American education system (K-12 to higher education)?

1. Read and Research: Class text; quote from Page 186 – "It is a peculiar sensation, this double consciousness, this sense of always looking at one's self through the eyes of others, of measuring one's soul by the tape of a world that looks on in amused contempt and pity. One ever feels his twoness, - an American, a Negro; two

souls, two thoughts, two unreconciled strivings; two warring ideals in one dark body, whose dogged strength alone keeps it from being torn asunder."

2.   Watch/Listen: Select one or two talks:
• https://www.ted.com/playlists/230/10_great_talks_to_celebrate_bl
• US economy: Why black Americans still find it harder to get jobs
• Can we overcome the economic legacy of racism?

3.   Theories: Incorporate William Cross' Identity formation model: http://www.racialequitytools.org/resourcefiles/Compilation_of_Racial_Identity_Models_7_15_11.pdf

4.   Wrapping it all up: **Watch/Listen:**
"The limits of tyrants are prescribed by the endurance of those whom they oppress". What does this mean to you and your generation?
• Black Politics in Trump's America
• https://www.youtube.com/watch?v=WDIyhv-d4-c

5.   Discussion post 1: Using the guiding questions for this module, and those in the "Wrapping it All Up" section (5) post a reflection (2-3 paragraphs/250-300 words) and respond to two classmates.

Telling Our Own Stories: A Phenomenological Study ofSub-Saharan African Immigrants

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Abstract

Many immigrants from Sub-Saharan Africa consider immigration towards the West as an opportunity for educational and economic self-fulfillment. Their needs and interests along with their skills and talents remain poorly understood and underutilized with most countries not recognizing their presence and doing little to facilitate their integration. We undertook this phenomenological project to not only investigate the unstructured phenomenon of immigration of Sub-Saharan Africans in the West, but also to tell our own varied and personal stories, and to share our lived experiences of perseverance, and our survival strategies. In doing so, we hope that future generations of African immigrants can learn from and be encouraged by our resilience, resistance and successes. The purpose of this paper is to reflect on the challenges of using phenomenology as a research design, present the process used and in the process give a voice to nameless and countless stories that represent the personal experiences of Sub-Saharan immigrants in the West. Using phenomenology as a design, we share on its challenges as we tell the stories and present some of the issues including how immigrants reconcile their understanding of success from their respective worldviews with the meaning of success in the countries they have emigrated to; how emigration has affected their personal, academic, social, economic, and professional lives; and what mechanisms of resistance they have developed in order to adapt to their new context.

Keywords: Sub-Saharan Immigrants, Phenomenology, Immigration, Storytelling, Resilience, Resistance

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The International Academic Forum
www.iafor.org

Background Information

The focus of Immigration policies in the West does not address the peculiar circumstances of Sub-Saharan Africans who are in the Western countries legally. For example, the Comprehensive Immigration Reform in the USA focuses only on border security, and other immigrant punitive measures including worksite enforcement penalties and employment eligibility verification but nothing to support immigrants from Africa. In the UK, immigration reform and new policies are not only harsh they are viewed as racist (The Independent, March 2015). Although The British Nationality Act 1948 granted the subjects of the British Empire the right to live and work in the UK, recent years have seen tighter immigration controls implemented even on commonwealth citizens (Chothia, 2013; Migration Policy Institute, 2009).

Throughout the literature and government census reports that were reviewed for this project, the recurring finding was that immigrants from Africa were the most rapidly growing and highly educated population of black immigrants from sub-Saharan Africa and is expected to continue to increase (Kent 2007). It was further reported that many of them are highly educated, underemployed, yet nearly 65% of African immigrants have one or more years of college education. This in comparison to records of the US Census Bureau that indicate that about 30 percent of the entire American population that is twenty-five years or older has a bachelor's degree or equivalent.

The majority of the black immigrants from Sub-Saharan Africa came from Nigeria, Kenya, Ethiopia Ghana, South Africa and recently more are coming in from Somalia and Sudan. African immigrants now make up 1.6 million or 36 percent of the black immigrant population (Census Bureau, 2019; Pew Research Center, 2013). However, their needs and interests along with their skills and talents remain poorly understood and underutilized with most US States and European countries barely recognizing their presence and doing little to facilitate their integration.

We are undertaking this project to not only investigate the phenomenon of immigration of Sub-Saharan Africans in the West, but to also tell our own stories, share our lived experiences of perseverance, our survival strategies and our continued experience with discounting so that future generations of African immigrants can learn from and be encouraged by our resilience, resistance and successes, and see that their experiences are not unique and that the obstacles that they will encounter are not insurmountable (hooks, 1989).

Purpose of Study

"It is our stories that connect us. It is our stories that allow us to hold up the mirror that looks like somebody else's life, but we actually get to see ourselves." Oprah Winfrey

The purpose of this paper is to reflect on the challenges of using phenomenology as a research design, maintaining unbiased interconnection between us as researchers and as the object of research, and still be able to give a voice to nameless and countless stories that represent the personal experiences of Sub-Saharan immigrants in the West. Using phenomenology as a design, we tell some of their stories and present

some of the issues including how immigrants reconcile their understanding of success from their respective worldviews with the meaning of success in the countries they have emigrated to; how emigration has affected their personal, academic, social, economic, and professional lives; and what mechanisms of resistance they have developed in order to adapt to their new context.

For the purpose of this chapter, African immigrants in the United States, refers to nationals of Africa that are not North Africans, but from the region commonly referred to as Sub-Sahara. African immigrants in the United States are the nation's most highly educated group. The authors are motivated by a common thread among the participants that were interviewed: "Telling our own stories from our own perspectives is important and empowering because when others tell it there are omissions and misrepresentations and a lot of stereotyping".

Researcher Bias

The main challenge was bracketing to avoid bias. Although in this paper we are researchers, we are not very different from the participants in terms of race, gender, and education as well as some minority characteristics such as ethnicity, and social-economic class. Our reasons for coming to the USA are also not very different: education and economic uplifting. The researchers are Black women who have experienced the challenges of leaving their home countries and being immigrants and minorities in the USA where racial bias especially on Black people is real and continues to hamper the development of that minority group.

The researchers' lived experiences that we share here, was done with the aim of getting a deeper understanding of the phenomena for personal self change, to get a chance to tell our own stories, for use in the future as life and student coaches in our roles as professors in higher education institutions, and most importantly to give the current and future immigrants a voice and validation about their experiences.

Research Methodology, Design and Procedures

The primary objective of this phenomenological study was to explicate the meaning, structure, and essence of the lived experiences of continental African immigrants. This paper presents data coding and analysis process and the critical themes that emerged. Participants were interviewed using structured and unstructured questions, which guided their description of their lived phenomenal experience. The interactive process was used to gather data through in-depth interviews and detailed descriptions of their experience, which were recorded digitally and through written self-reports.

The researchers' aim was not to produce a general description of how to conduct a phenomenological study, but to record the challenges we faced during the process, our reflection, experiences, and strategies of coping, as well as those of the respondents for future immigrants, for communities and governments to use in planning support interventions. Understanding the specific experiences of sub-Saharan or Continental Africans in the West could help Western host countries develop better social programs to serve the needs of those immigrants and ensure their smooth transition and integration.

By doing so, this project fills a gap in a much-needed literature and methodology about the lived experiences of the fastest growing immigrant populations in the West (Census Bureau, 2019). In addition to being therapeutic, the support circles that these immigrants have build have become their safe spaces for the members and we will be using them as such. In the process of research and interviews, researchers found out that some the immigrants already had unstructured forums where they met and shared foods from their countries of origin. These would be great opportunities for the researchers to expand and use as basis for a future coaching and mentoring program.

Many Sub-Saharan immigrants come to America and other European countries, completely unaware of the different ways in which racism and discrimination can negatively impact their lives and even derail their initial plans of achieving their education and or economic dream. Indeed, most of them initially believed that their hard work ethic will ultimately lead them to economic success and they completely discounted the impact of race on their lived experiences. Just to come to the realization of the insidious social and economic implications of race in America as well as other countries in the Global North (Chothia, 2013) is a continuous challenge.

Being qualitative in nature, the phenomenological design enabled the researchers to explore and describe the lived experiences and sense-making of Sub-African Immigrants. To collect quality data, in-depth approaches including open-ended, unstructured questions and follow up discussions were used. This was presented to the respondents as an evolving set of questions "that may seem more like a friendly conversation than a data-gathering interview" (Knox and Burkard, 2009, p.3). This in and of itself is a great challenge. The researchers had to constantly refocus themselves and bracket their experiences and emotions or else they would lose themselves in the story, emotions of empathy and it would become intertwined with their own.

Bracketing had to be used consciously all the time to avoid bias where there was data that was outside the researcher's experience and or expectation. On dealing with the recorded text and allowing for the phenomena to speak for itself, Moustakas (1994) advised researchers to ensure that the meaning, essence, and intention are understood. The next step was an intuitive reflective interpretation process so as not to overlook a person's individuality that came through the words and emotions as they narrated their stories. Phenomenology allows a researcher to gain a deeper understanding of the nature or meaning of the everyday experiences of the target audience because apart from being interactive, it is within the participants' environment.

Simms and Stawarska (2013) and Fisher and Embree, Eds, (2000) offer that, a researcher's role at this phase is to give participants an opportunity to voice their concerns, to share their lived experiences as a way to affirm their own efforts and agency in their success, with the understanding that knowledge and meaning is constructed individually and or collaboratively. From the aggregated responses of 25 out the 30 Sub-Saharan Immigrants who completed our interview, the researchers were able to determine their perceptions on the impact of relocating to the USA and other countries, their coping strategies and definition of success. Some of the participants revealed that they had relocated to countries like Malaysia before eventually ending up in the USA.

Once potential participants had been recruited to take part in the research study, researchers engaged in a multiphasic informed consent process. The individual meeting served not only as the final phase of the informed consent process whereby potential participants could get any questions answered about the research as well as the interview session. During the first 15 minutes of the individual meeting, researchers finalized the informed consent process and obtained signatures and or oral permission to proceed.

In the latter 45 minutes, researchers conducted the interview sessions and digitally recorded the responses for ease of transcription later on in the research process. The transcribing of the recorded contents of the entire interview of each participant was used to develop summaries of each interview. A hard copy of the transcribed interviews and summaries was stored in a locked file cabinet with no identifying information on them; therefore protecting the identity of the participants and upholding confidentiality.

These steps are very challenging when compared to quantitative research where the data-gathering tool is very impersonal and very anonymous; there is no content to record or transcribe because the goal is not maintaining the story and narration style, as is the case in phenomenological design. Once the interviews were transcribed, the researchers entered the data into qualitative data analysis software, which helped us develop codes and themes from the transcribed information. Researchers used the recurring themes from the responses to discuss and describe the inner and lived experiences of the participants.

Data analysis: The process

Setting and Demographics

Table 1: *Participants' Bio Data*

Age Range	Total
19-22	2
23-26	2
27-30	4
31-33	3
34-37	1
38-41	0
42-45	3
46- 49	3
50-53	1
54-57	2
57 and above	4

Table 2*: Gender*

Female	13
Male	12
Other	0

Table 3: *Length of Stay in US*

Length Range in years	Total
1 and below	0
2-5	3
6-9	5
10-13	3
14-17	3
18-21	5
22-25	1
26-29	2
29 and above	3

Table 4: Country of Origin

Country	Total
Kenya	11
Ethiopia	2
Uganda	3
Rwanda	1
Burkina Faso	2
Senegal	1
Nigeria	3
Zambia	1
Botswana	1

Table 5: *Reason for Migrating*

Reason	Total
Education	20
Marriage	3
Business	0
Family	2

Table 7: *Marital Status*

Status	Total
Married	18
Single	7
Engaged	0
Living with girl/boy friend	0

Table 6: *Education/Degree Achieved*

None	2
Associate	0
Bachelors	12
Masters/MBA	6
PhD	4

Participant's age ranged from 19 to 0ver 65 but did not differ in terms of gender as shown in table 1. Non-response rate was insignificant and did not affect the results. Further, being a phenomenology, each participant's story has it's own level of significance and ability to give voice and validation to the individual. Education is the main reason most of the African immigrants came to the US as shown in table 5 and 6. Although most of them came when they were young and single, with time their status changed as indicated on table 7.

Data Organization and Coding

Data was organized by transcribing the audios manually, listening again and again to confirm quality, compiling them all into one text document, then uploading it to Atlas.ti qualitative analysis software. This process enabled for the identification and construction of frameworks guided by the research questions and the conceptual frameworks. The data was then sorted into the framework and labeled ready for descriptive analysis and later for discussing the relationships.

The main challenge was the reading and re-reading a text, listening to the audios over and over, taking notes, reflecting on the data and writing down interpretations and ensuring that none of the responses was omitted or misrepresented. Using Atlas.ti qualitative data analysis software, the researchers used open coding to initially create as many codes as possible followed by axial and scheme coding as shown in figure 1, 2, 3 and 4.

Another challenge included the process where researchers observed the frequencies and intensity of occurrences of a concept as displayed by the software and making memos and code notes. The process enabled the researcher to identify patterns in the data and to search data to help answer the research questions. Despite the challenges, using software not only made the process faster and neater but it also enhanced the reliability, credibility of interpretations and validity/trustworthiness of findings by producing analysis, creating, inserting and indexing codes and constructing hyperlinks that made it easy to retrieve selected segments within the text. It also made it convenient to store and display large amounts of qualitative data without becoming concerned about space or how to view multiple segments at once as shown in figure 1, 2 and 3.

Figure 1: Data coding stage one
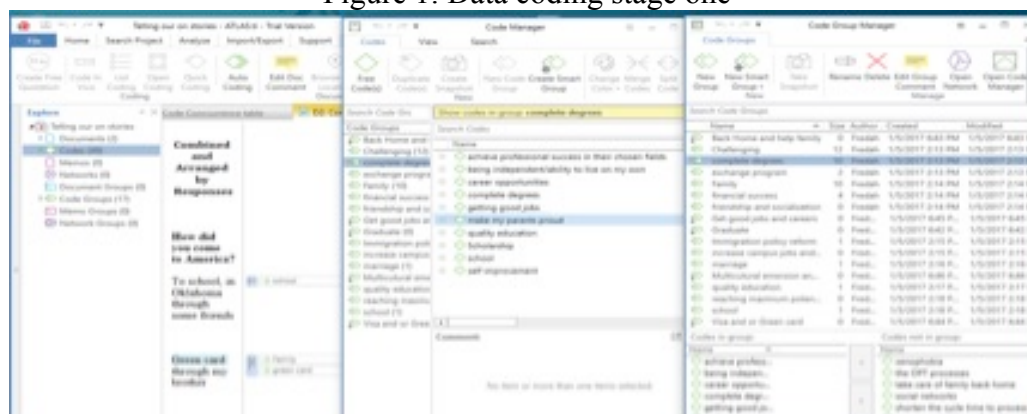
Figure 2: The Initial 49 Codes Selected

Figure3: Whole document word cloud
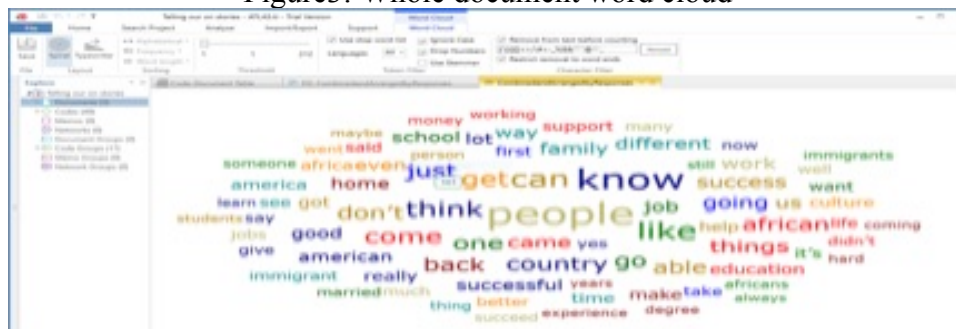
Word crunch, although alphabetical, was another challenge as it was too huge a list to be significantly useful to the project (see Figure 4). Word cloud (Figure 3) was preferred because it sieved the frequently used words. More than three levels of coding were used to ensure the rigor of data analysis thereafter, constituting yet another challenge. The first open coding level was done concurrently with re-reading and listening deeply to the content to identify constructs as outlined in the theoretical and conceptual section. The second level was a bit structural and was linked to the research questions. The third level was to start the process of identifying recurrent patterns from the intensity observed from the frequencies (Figure 1, 2, 3 and 4). The next two levels were focused on narrowing down the patterns and combining them into themes

Figure 4: Whole document sample of wordlist frequency

From the responses and guided by the research questions, the researchers focused on the emerging groups of concepts, similar and different major experiences, participants' opinions and values within the context of being international students and African born immigrants in the USA. These were what were indexed and used as codes. Coded data as shown in Figure 1, 2, 3 and 4 was then filtered, re-coded and

further color coded to narrow down the frequent codes which were then screened for the most recurrent and eventually into themes and sub-themes.

Five major themes that seemed to answer the research questions and support literature review section that were revealed from the data included the challenges of being an immigrant in the USA, perception and definition of success, racism and discrimination, coping strategies and the myth of completing degrees and going back home. Sub-themes included how they came to the USA, their experiences, comparing their success to others who came before them, and the Optional Practical Training (OPT) Process.

Data Analysis

The categories from the coding process were then further sorted into recurring themes. All narratives related to a particular theme were placed under that theme. For example those categories that highlighted the challenges of being an immigrant were grouped together, just as were those on success, racism, coping and myth of going back home (Table 8).

Table 8: *Themes, subthemes and Frequency of Reponses (%)*

Research Question Phrase	Theme	Sub-theme
How did you come to America? Why did you come to America? How has your experience as a continental African immigrant in America been like?	Challenges of being an immigrant in the USA	How they came to the USA
What does success mean to you?	Perception and definition of success	
What are the personal expectations/goals you set when you arrived in America? What are the expectations/goals that your family set for you?/expected of you?	The myth of completing degrees and going back home	Coping strategies
If you were to make a suggestion to your State Representative about resources and support that immigrants would like to see happen, what would that be?	Their recommendations on further support for international students	

Figure 5: Coming to America
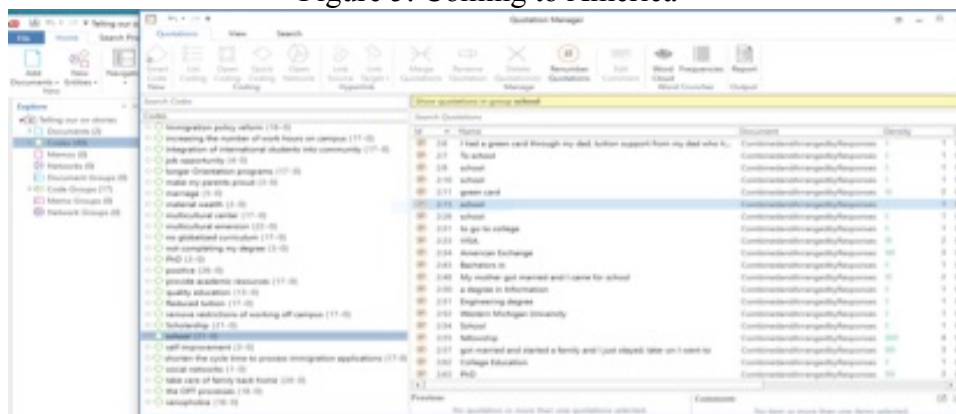
The majority of the participants cited school as the main reason why they came or were sponsored to the USA. Others came with the hope of getting jobs and making money so as to live a good life as well as support their families back home while others came to join family and or their spouses. The major visa categories were student and Green Card.

The exchange program that was aligned with the local university.

I came to totally do personal improvement. l realized it was only America that could sustain my faith to improve myself.

School brought me to America.

I came to visit, then I got married and started a family and I just stayed, later on I went to school.

I won the diversity visa lottery.

Figure 6: Major Reason: To school to complete degrees
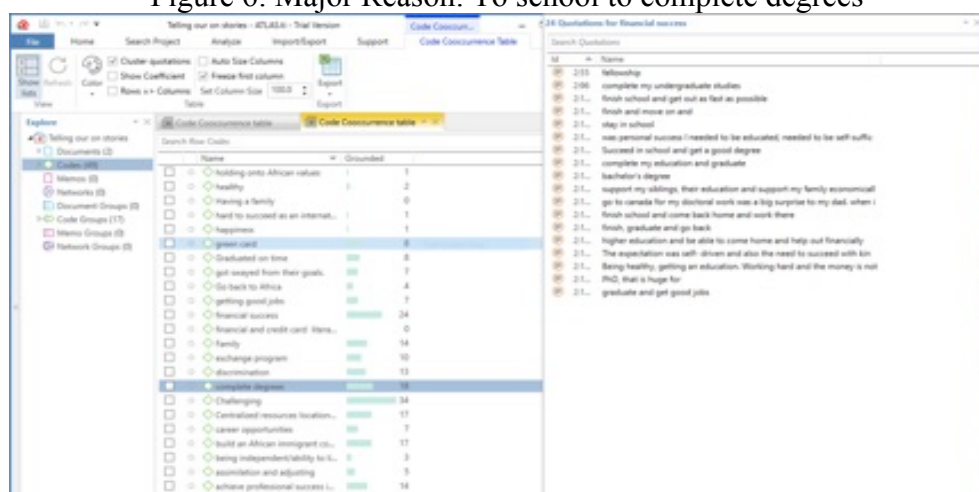
The main reason for coming to USA was school with the goal of getting their degrees and either going back home or using those degrees to get good jobs in the USA or back home. Unfortunately, some of them did not have their dreams come true for a variety of reasons including finances, cultural challenges, illness, or the opportunity to work and thus getting distracted from studies.

Figure 7: Life and School in the USA Is Challenging
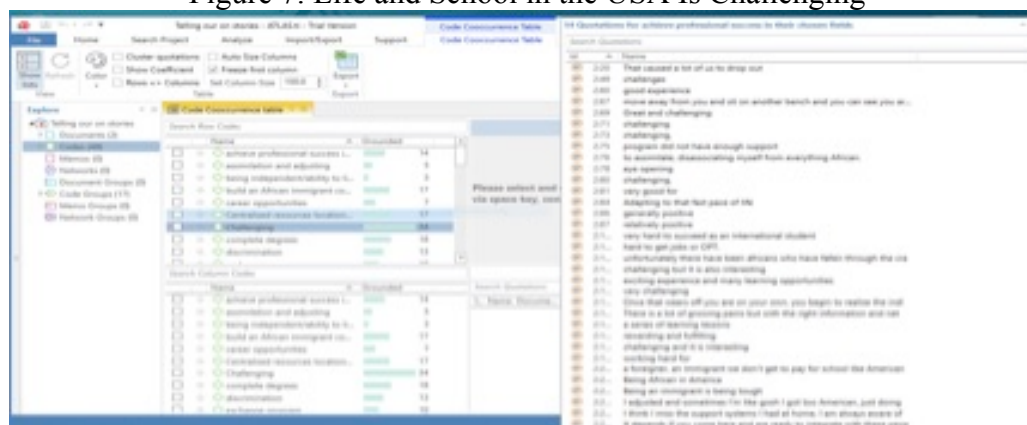
Most participants said, "Life on your own in the US is hard. Those who come after us should have an easier life here in the US if they knew from us what we have experienced". The reasons they gave for life as an international student being hard and challenging included:

As a foreigner, being ridiculed, stereotyped.

Language barrier was very humiliating.

International students are burdened with so many credit hours per semester even if they are not working it is too much knowing what other factors they are struggling with.

Option to work more hours, and a revision of the restrictions of working off campus.

I lived in a predominantly white state and even in church where you are expecting to be better accepted they move away from you and sit on another bench and you can see you are not accepted. In school it was hard to get a friend.

Figure 8: Challenges to Achieving Success
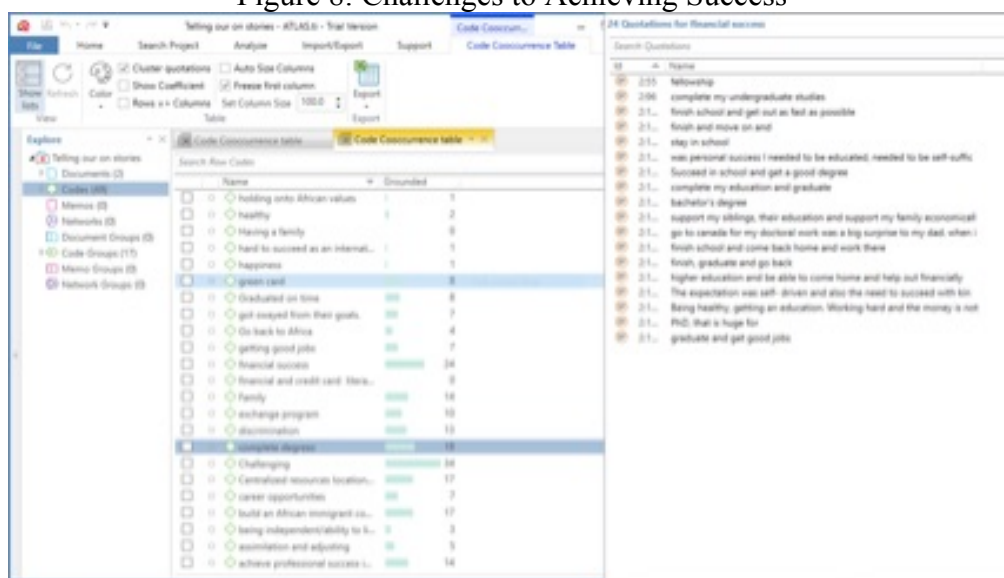
Most of the participants that were students, were still struggling academically with full time classes and full time low paid jobs on campus. Although some managed to get their degrees, it was hard to get jobs outside campus or OPT. Others were still struggling to get scholarships and or teaching assistantships to pay for school. Major challenges cited that hindered their success included:

> In terms of academic success and achieving a bachelor's degree it was both my parents' and my expectation.

> My family's expectations for me were to graduate, get a job, send them money, because I am the most educated and so the expectations to support them financially is higher.

> The exchange program did not have enough support and the orientation program was very brief and so much information all in a week and then after that you are on your own and no follow up.

> My experience socially we feel very isolated, from African Americans you don't feel like you have much in common with them.

The expectation that once done with school they would go back home and contribute to national success and development has become a mirage for many. For most, their dreams have not been realized and they either are accepting their situation, settling or getting disillusioned. At first their dreams were clear and future was bright and hopeful as indicated by some of their statements.

> …go back home yet I don't have enough savings, so I am thinking about that. But I would like in future to invest in US and my home country.

After completing education and struggling to get jobs and or OPT they become disillusioned:

> They expected me to be done with my education and go back home to work in a big company and earn a lot of money.

Well, my parents wanted me to finish school and come back home and work there.

My life here has been very unsuccessful. I came here with intention of finishing my degree but got a lot of setbacks and I gave up on school and decided to work on meager jobs to support my family.

Some get married to Americans to get papers and to get jobs so they can support themselves and their families back home.

Researcher Bias and The Phenomenologist Challenge: Researchers' Reflection and Lessons Learned

When we were envisioning this research, we did not realize just how challenging it was going to be in terms of bracketing and being objective as expected of phenomenological studies. Being the observer, whose background and experiences are so similar to the observed/the interviewees, posed a challenge of introducing bias into the study. Although we made every effort to control such bias, we are here sharing our stories from our lived experiences, for the sake of clarifying and also presenting the challenges. Both researchers are immigrants from Continental Africa, but from different regions. One is from the East and the other from the West of Africa.

What was interesting and challenging at the same time was how the major issues and themes raised in this study mirror the lived experiences of both the researchers themselves, as well as those of the interviewees.

The major themes that the researchers wove into their reflection include the challenges of being an immigrant in the USA, perception and definition of success, racism and discrimination, coping strategies and the myth of completing degrees and going back home. Sub-themes include how they came to the USA, their experiences, comparing their success to others who came before them, and where they are now.

Recommendations

Participants' recommendations that they felt would improve college life for them and other future international students included a social program with a centralized place and equipped for African Immigrants to help them adjust and integrate into the higher education environment in the USA, navigate campus, determine success, get a campus job, maintain immigration status, achieve academic success, get food cheaply, international scholarships, events on campus, career opportunities, and information on companies that employ students legally. The center most important because it would help them solve all the other challenges of being lonely, missing deadlines on school assignments because they did not know how to navigate the electronic resources, and dropping out due to economic hardships.

The researchers concurred with the participants especially about a student success center with a program that supports immigrant students' success by focusing on their unique needs. Most international students from developing countries, once their parents or sponsors pay tuition, they is no allowance provided for the student.

Expanding job opportunities on and off campus would provide for them necessities that the university does not provide like food and accommodation as well as books.

Conclusion

It was evident throughout our research that being a Sub-Saharan/Continental African immigrant poses unique challenges. Apart from isolation, loneliness and missing family and community support, adjusting to the weather and different cultures were among the major challenges cited. Economic challenges were also a major hindrance to student success.

A phenomenologist approach to research is also challenging. Being involved and immersing too intensely can introduce unintended bias. Data collection becomes a huge endeavor because of the large amount of data collected. Analyzing and interpreting without introducing personal bias is was the greatest challenge. Bracketing was very helpful to the researchers.

The benefits, however, compensated the strenuous effort. They include being able to observe a familiar phenomena and immersing one self into it. It is refreshing to be able to support such a community while at the same time become an engaged scholar and provide a solution that not only helps the community but the researcher as well.

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Appendices

Appendix 1: Interview Protocol

Participants will be asked the following questions below. The interview will take 45 minutes and will be recorded using a digital recorder. Researchers will review the informed consent document before starting the interview and they will remind participants of the voluntary nature of this research study. Researchers may also answer any questions participants might have. Researchers will refer to participants by number so that they can protect the identity of the participant.

Bio Form

What is your age?

What is your gender?

What is the highest degree you have achieved?

How long have you been in the USA?

Interview Questions:

1.   How did you come to America?

2.   Why did you come to America?

3.   How has your experience as a continental African immigrant in America been like?

4.   What are the personal expectations/goals you set when you arrived in America?

5.   What are the expectations/goals that your family set for you?/expected of you?

6.   What does success mean to you?

7.   Has your nationality and /or gender hindered or helped you in any way?
        If so, how?
        If not, how do you explain that?

8.   Do you know people from your country and/or other African countries who have come here and have been successful?

9.   What does their success look like? Describe their success.

10.   Do you know people from other African countries who have come here and who have not been successful?
11.   What does that look like?

12.   Has living in a different culture with different values impacted your marriages?

         If so, how and why?

13.   If you were to make a suggestion to your State Representative about resources and support that immigrants would like to see happen, what would that be?

14.   How is being an immigrant in the West? (U.S.A.; Canada; U.K.; Australia)

Thank you for sharing your story with us.

Religious Prosperity Calling Cultural Progress:
Architectural Discourses on Korean Catholic Churches (1979–94)

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The Kyoto Conference on Arts, Media & Culture 2020
Official Conference Proceedings

Abstract

After the Korean War (1950–53), the South-Korean Catholic population increased unprecedentedly, despite the Confucian roots of the nation. From 1979, this Catholic boom reached a climax, which was accompanied by the 200th anniversary of the Korean Catholic Church in 1984 and celebrated with commemorative cultural events and projects. Pope John Paul II visited Seoul twice, in 1984 and 1989. The population proportion of South-Korean Catholics reached about 7.5 per cent in 1994, but their growth rate began to decrease shortly after. How did the 1984 bicentennial celebration of the Korean Catholic Church affect the development of church architectural discourses within Korean art, architectural and Catholic societies during the Catholic prime from 1979 to 1994? This research explores the discourses of three most influential magazines: *Space* (1966–), *Monthly Architecture & Culture* (1981–) and *Kyeonghyang Magazine* (1906–). Surveying their articles revealed that the bicentennial celebration of 1984 developed the styles, distinctiveness and influence of Korean church architectural discourses. It facilitated more church projects which brought more elaborate methods for generating discourses and encouraged the authors and readers to reflect on Korean identity in church art and architecture. Additionally, it allowed the discourses to affirm the significance of Korean church architecture in general Korean architecture.

Keywords: Contemporary Religious Architecture, Korean Catholic Church, Late Twentieth Century, Architectural Discourses

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Introduction

After the Korean War (1950–53), the South-Korean Catholic population increased unprecedentedly, despite the Confucian roots of the nation: proportion attained 1 per cent in 1955, and 2 per cent in 1962 (Shin, 1995, pp. 1–5). This rapid growth led to the elevation of the Korean Catholic Church within the global Catholic Church. On 10 March 1962, Pope John XXIII established the official clerical hierarchy within the Korean Catholic Church, which allowed legislative, judicial and administrative autonomy (Research Foundation of Korean Church History, 2011, pp. 224–232). From 1979, the South-Korean Catholic boom climaxed and was accompanied by the 200th anniversary of the Korean Catholic Church in 1984 (Shin, 1995, pp. 5–6). This bicentenary was celebrated with a variety of commemorative cultural events and projects, besides the visit of Pope John Paul II to South Korea and the following enormous ceremony ('Hangukcheonjugyohoe 200junyeon eotteoke chireojyeonna', 2004). The population proportion of South-Korean Catholics reached about 7 per cent in 1992 and about 7.5 per cent in 1994, but their growth rate dropped under 4 per cent in 1995 and to about 1.9 per cent in 2003 (I. Kang, 2006, pp. 70–74).

This research explores how the bicentennial celebration of the Korean Catholic Church impacted the development of Korean church architectural discourses within national art, architectural and Catholic societies during the Catholic prime from 1979 to 1994. Although these discourses reflect the developmental state and controversial issues of Korean church architecture at the times, they were not deeply investigated as an independent topic by the previous studies on Korean church architectural history.[1]

The main research materials are obtained from three Korean magazines, which provided influential, continuous and nationwide discussion platforms: *Space* (1966–), *Monthly Architecture & Culture* (1981–) and *Kyeonghyang Magazine* (1906–). *Space* was firstly published by architect Kim Swoo Geun (1931–86), and was the only monthly magazine at that time for the primary studies and criticism about architecture, environment and aesthetic issues (Kim Swoo Geun Foundation, n.d.). *Monthly Architecture & Culture* was the first Korean magazine fully dedicated to architecture, which aimed at offering architectural information, especially on new domestic and foreign construction methods and materials ('Wolgan geonchuk munhwa changgan', 1981). *Kyeonghyang Magazine* of the Korean Catholic Church is the oldest Korean magazine continuing to the present day, which was firstly published to inform local Catholics on religious doctrine and current affairs (Yun, 2006, pp. 11–12).

The previous issues of *Space* and *Kyeonghyang Magazine* are acquired through their official websites. *Monthly Architecture & Culture* has its archival webpage with its former issues before 2016 on the website of Architecture & Urban Research Information Center. Other Catholic periodicals and documents are consulted mostly at the website of the Catholic Bishops' Conference of Korea.[2]

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[1] Main previous studies are *Hanguk gatollik seongdang geonchuksa* (Jung-shin Kim, 1994), *Yeoksa, jeollye, yangsigeuro bon hangugui gyohoegeonchuk* (Jung-shin Kim, 2012) and *Gyohoegeonchugui ihae* (Jeong, 2000).

[2] Following are the specific webpages to obtain these materials: *Archive* (Space, n.d.), *Sidaesunbogi* (Kyeonghyang Magazine, n.d.), *Wolgan geonchungmunhwa* (Architecture & Urban Research Information Center, n.d.) and *Munheon geomsaek* (Catholic Bishops' Conference of Korea, n.d.).

Catholic Artists' Union of Seoul, the first union of Korean Catholic artists

The Second Vatican Council (1962–65) of the Catholic Church recognised the new fields of modern societies which were opened to the laity and encouraged them to strengthen lay associations for effectively penetrating each area of the world with the Gospel (Second Vatican Council, 1965, secs 1–6, 18–19). Following this recommendation, the Catholic Lay Apostolate Council of Korea (henceforth CLAK) was founded in 1968 and urged local dioceses and parishes to establish their lay apostolate councils. In the Archdiocese of Seoul, the Catholic Lay Apostolate Council of Seoul and the Catholic Artists' Union of Seoul (henceforth CAUS) were established in 1968 and 1970 respectively (Kyeonghyang Magazine's newsgathering department, 1970b, pp. 20–22). CAUS was the first union of Korean Catholic artists and formed the foundation for Catholic Artists' Association of Korea founded in 1985 (Juwan Kim, 2018).

Soonsuk Lee (1905–86) was the first president of CAUS (Kyeonghyang Magazine's editorial department, 1970, p. 97). He was a craftsman who pioneered Korean applied arts. After graduating from the design department of Tokyo Fine Arts School, he had been appointed as a professor at the college of Fine Arts in Seoul National University in 1946 (Kyeonghyang Magazine's newsgathering department, 1970a, pp. 58–62).

Kim Sechoong (1928–86) was the second president of CAUS (Catholic Artists' Union of Seoul, 2008). He led the first generation of Korean contemporary sculpture, after finishing his studies at the college of Fine Arts in Seoul National University (Kimsechoong Museum, n.d.-a). He began to work as a professor in his alma mater in 1954 and became the director of the National Museum of Modern and Contemporary Art, Korea in 1983 (Kimsechoong Museum, n.d.-b).

CAUS strived to introduce Catholic sacred art to the local public by holding its annual art exhibitions. Some of CAUS members also decorated church buildings with their artworks (Catholic Artists' Union of Seoul, 1976, p. 5). Additionally, Soonsuk Lee and Kim Sechoong advised a subcommittee for art in the Archdiocese of Seoul on church construction (Seo, 1971, pp. 17–18). CAUS included architecture as its interest field in 1981 and recruited two architect members, Hijun Yu (1934–) and Kang Suk Won (1938–), before June 1982 ('Gatollik misulgahyeopoe', 1982).

The slow formation of early church architectural discourses (before 1979)

Architect Lee Hee Tae (1925–81) was the initial contributor to extending Korean architectural discourses to the churches designed by local architects. His educational background as a graduate of Kyungsung public vocational school was humble, compared to mainstream architects who dominated major projects. Accordingly, Lee Hee Tae found his clients mostly in the Catholic Church and among private universities (B. Kim, 1994, pp. 113–115). In 1964, he designed the memorial church in Jeoldusan Martyrs' Shrine ('Hyeondaegeonchukgasang ihuitae', 1971, p. 35), whose artworks were directed by Kim Sechoong (Park, 1987, pp. 19–24). The completion of the church attracted *Space* to firstly spotlight a church building designed by a Korean architect as a main topic of an article.[3] The church was selected

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[3] The observation in this sentence is based on the data from *Archive* (Space, n.d.).

by *Space* as one of three notable architectural projects in 1967, and decorated the December 1967 issue with its architectural drawings and photos ('Jungongjakpum: bokjaginyeomseongdang', 1967, pp. 7–9), followed by an architectural review (Lee, 1967, pp. 10–11).

Subsequently, the church designs by other local architects were covered as main topics by *Space*. Each article, however, mostly dealt with one church project or one architect, and their number remained around ten from 1968 to 1978. During the same period, three articles were published on church buildings in Korea designed by foreign architects. Two articles were on the Myeongdong Catholic cathedral in Seoul, a Gothic church completed in 1898 and designed by the French missionary Father Eugène Jean Georges Coste (1842–96). There were also three articles on the church architectural theory of European architects and their projects outside of Korea.[4]

This slow formation of early church architectural discourses can be attributed to practical difficulties in church construction and to the lack of interest in the quality of church architecture. The special feature of *Kyeonghyang Magazine* in July 1971 summarised a discussion by Kim Sechoong, two priests and a lay parish president about the problems ensuing church construction. The panel members remarked that the existing custom of building churches without professional architects was mostly due to financial shortage and led to inartistic and unsustainable results (Seo, 1971, pp. 16–27).

Increasing attention to the church projects of Korean architects (1979–83)

In 1979, the Korean Catholic bishops established a preparatory committee for bicentennial commemoration (Secretariat of Catholic Bishops' Conference of Korea, 1979, p. 12), which was reorganised as the Commission for Bicentennial Celebration in the next year (Secretariat of Catholic Bishops' Conference of Korea, 1980, p. 12). By December 1982, this commission was developed to include four executive committees respectively for piety movements, celebration events, pastoral councils and commemoration projects as well as a secretariat and a central committee (Commission for Bicentennial Celebration, 1982, p. 3).

CAUS also actively participated in the bicentennial celebration preparation and suggested founding a subcommittee for art-related work, which was approved by the Commission for Bicentennial Celebration in 1982 (Kyeonghyang Magazine's editorial department, 1982d, p. 54). This subcommittee aimed to provide designs required for celebration events, and was joined by some CAUS members, including Kim Sechoong and Hijun Yu (Commission for Bicentennial Celebration's secretariat, 1983, p. 11).

Particularly, the contribution of CAUS to *Images of the Eternal, the International Exhibit of Modern Religious Art* was irreplaceable. Its president Kim Sechoong conceived this exhibition to encourage Korean Catholic art to develop in international interactions. He and Bishop John of the Cross Chang Yik (1933–2020), the chaplain of CAUS at the time, negotiated with European Catholic and governmental organisations to borrow artworks. In 1982, CAUS recommended the members of an

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[4] This counting of articles is based on the data from *Archive* (Space, n.d.).

expert committee for the exhibition, which contained Kim Sechoong and Hijun Yu. In the same year, CAUS also resolved on the commitment of all members to the exhibition through its general assemblies (Commission for Bicentennial Celebration's executive committee for celebration events, 1983, pp. 9–11).

The admiration of the Korean Catholic Church for European church art and architecture influenced church architectural discourses within the Church. From January 1980, *Kyeonghyang Magazine* serialised pictorial articles for two years under the title 'Haneunimui jip' (The house of God), which traced back the history of worldwide Catholic church architecture (Kyeonghyang Magazine's editorial department, 1980a, pp. 5–8). These articles selected historic churches and artworks mostly in Europe. Each article chose a distinctive theme, such as Italian Romanesque churches (Kyeonghyang Magazine's editorial department, 1980b, pp. 5–8), medieval French stained glass (Kyeonghyang Magazine's editorial department, 1980c, pp. 5–8), and Belgian and Swiss Gothic churches (Kyeonghyang Magazine's editorial department, 1981, pp. 9–12).

The construction of Korean Catholic churches was mostly described as one of principal accomplishments in parish history. From January 1982, *Kyeonghyang Magazine* carried 'Mideumui gongdongche' (The community of faith), a series of articles which introduced one Catholic community in each issue (Kyeonghyang Magazine's editorial department, 1982a, pp. 9–12). In the articles on Jamsil and Jemulpo Churches, two parishes established in the 1970s, church construction was depicted as their first momentous project. Their commitment to the construction was pointed up by the text and photos of female and male parishioners working on construction sites (Kyeonghyang Magazine's editorial department, 1982b, pp. 61–64, 1982c, pp. 61–64).

Meanwhile, in the mainstream Korean art society, Hijun Yu, one of first CAUS architect members, won the presidential prize in the national art exhibition in spring 1979 ('Daetongnyeongsang geonchuk yuhuijunssi', 1979). His award-winning work collected his church and convent designs ('Daetongnyeongsangbadeun yuhuijunssi', 1979). This news was reported by *Kyeonghyang Magazine* and *Space*. The former generally described the educational and professional backgrounds of Hijun Yu as well as the theme of his awarded work (S. Kim, 1979, pp. 48–49). The latter explored Yu's architectural philosophy and remarked that he achieved well-functioning, cost-saving and aesthetic designs which would satisfy the psychological needs of users (Tcho, 1979, pp. 110–113). Subsequently, *Space* noted new churches mostly designed by well-known Korean architects, such as the Yangduk Cathedral of the Masan Diocese (1979) by Kim Swoo Geun, the Hangang Catholic Church (1980) by Kim Won (1943–) and the Chungdong First Methodist Church (1979) by Kim Jung Sik (1935–) in separate articles (Pax et al., 1980, pp. 12–59; W. Kim, 1980, pp. 73–75; Junglim Architecture, 1980, pp. 15–18).

Monthly Architecture & Culture (1981–) presented an advanced stage of Korean church architectural discourses with two special sections respectively published in 1982 and 1983. These sections collectively reviewed several churches mostly designed by local architects, and generated an idea or an issue to be discussed further. The former section looked into eleven Protestant churches, nine of which had been designed by local architects. It considered that the forms and scales of Korean

Protestant churches were more divergent and more controversial than Korean Catholic churches due to the lack of common morphologic symbols within Protestant denominations (Jung, 1982, pp. 46–88). The latter section covered two Catholic, two Protestant and one Anglican churches designed by different local architects. The architectural drawings and pictures showed the difference of each church in design, space composition and programmes, depending on its denomination and urban context (Monthly Architecture & Culture's editorial department, 1983, pp. 27–61).

In this growing attention to the church projects of Korean architects, church construction for bicentenary celebration boomed nationwide in 1983 (Deokhaeng Kang, 1983, pp. 27–28). At diocesan level, about eight out of fourteen South-Korean Catholic dioceses completed or planned one or more commemorative church construction projects by February 1984 (Oh, 1984, pp. 7–11). Particularly, the Archdiocese of Daegu initiated a project of building sixteen commemorative churches in January 1983 ('Seongjeongeollipdaeyeoksa sijak', 1983).

Diversified discourse issues on Korean church architecture (1984)

The Korean Catholic Church opened 1984 in the expectation that its 200th anniversary would be the holy year of salvation celebrated with large festivals. The most spectacular event was the visit of Pope John Paul II (Korean Catholic bishops, 1984, p. 14). In May 1984, the pope led the bicentennial celebration and the canonisation of 103 Korean martyrs on the Yeouido square in Seoul in front of around one million believers (Research Foundation of Korean Church History, 2018, pp. 152–153).

The exhibition *Images of the Eternal, the International Exhibit of Modern Religious Art* (henceforth *Images of the Eternal*) was held in Seoul from 21 July to 14 September 1984 in the National Museum of Modern and Contemporary Art, Korea (Kyeonghyang Magazine's editorial department, 1984b, pp. 6–7). About three hundred artworks were exhibited, borrowed from the Collection of Contemporary Religious Art in the Vatican Museums, the French Ministries of External Relations and Culture, the Catholic Archdiocese of Cologne, the Roman-Germanic Central Museum, Mainz, and CAUS. These artworks were mostly created after World War I and were classified into nine sections: sculpture, painting, engraving, drawing, crafts, glass-painting, photograph, textile art and architecture. For the architectural exhibits, the Catholic Archdiocese of Cologne offered thirty-five photos printed on aluminium plates, which captured German church architecture during 1965–84. CAUS presented the other two architectural exhibits, created by Hijun Yu and Kang Suk Won (Catholic Artists' Union of Seoul & Munhwa Broadcasting Corporation, 1984, pp. 10–11, 167–205, 315–354).

In two articles on *Images of the Eternal*, *Kyeonghyang Magazine* focused on introducing the artworks of foreign artists (Kyeonghyang Magazine's editorial department, 1984b, pp. 6–10, 1984c, pp. 6–11). Another article of the magazine reported the bicentennial commemorative exhibition of CAUS alone. This article mentioned that the exhibition aimed to encourage the development of Korean sacred art and its national identity. It carried the pictures of the exhibits which featured the Virgin Mary and saints in Korean traditional outfits (Kyeonghyang Magazine's editorial department, 1984a, pp. 6–11).

Space also published a special section about *Images of the Eternal* in September 1984. This section viewed that the exhibition provided an opportunity for Korean artists to orient themselves in a global context. An article of the section on architectural exhibits commented that the various forms of the German churches were originated from divergent theological interpretations on salvation, whose concept was changing in contemporary times. This article added that the quantitative expansion of church buildings in South Korea should be reconsidered (Space's editorial department et al., 1984, pp. 76–90).

The maintenance of Catholic religious buildings was another topic addressed by *Space*. In September 1984, an article selected the Myeongdong Catholic Cathedral as one of the best preserved architectural heritages among initial Western-style buildings in South Korea. This article reviewed the preservation project on the cathedral in the 1980s (Moon, 1984, pp. 96–100), carried out by Myeongdong Parish to commemorate the bicentenary of the Korean Catholic Church ('Saemoseup deureonaen myeongdongdaeseongdang, 3nyeonganui daedaejeok bosujageop mamuri', 1984). In the same month, *Space* ran an interview report on the project of architect Kim Won in Myeongdong nunnery. The client asked to demolish the old building and construct a new church, but the architect convinced the client to keep and renovate the existing buildings, including the old church, and to build a new church additionally (W. Kim & Kim, 1984, pp. 142–149).

Meanwhile, in July 1984, *Monthly Architecture & Culture* started 'The Catholic Church Architecture in Korea', a special column written by the architectural historian Jung-shin Kim (1952–). The magazine considered that the most required work in the bicentenary of the Korean Catholic Church was to organise its church history, which would cover church architecture and heritage. It remarked that Catholic churches had a crucial position in the history of national modern architecture but the relevant research could not proceed due to the lack of empirical materials. The column, therefore, aimed at introducing churches with significance in times, regions and styles with photos and architectural drawings, based on actual measurement (Jung-shin Kim, 1984, pp. 8–15).

Also in July 1984, *Monthly Architecture & Culture* carried a special section on Korean church architecture. Among seven selected projects, four were on Catholic churches designed by local architects and located in Gangnam, the area south of the Han river in Seoul (Monthly Architecture & Culture's editorial department, 1984, pp. 61–98).

Diagnostic discussions in the post-bicentennial era (1985–94)

From 1984 to 1994, the rate of increase in Korean Catholic population was about 80.6 per cent (I. Kang, 2006, pp. 73–74). The Catholic Church regarded the bicentennial celebration events as one of the contributors to publicising Catholicism and thus stimulating rapid growth (Shin, 1995, pp. 5–6). In October 1989, the successful 44th International Eucharistic Congress in Seoul placed South Korea on the map of the universal Catholic Church —like the 1988 Summer Olympics of Seoul had contributed to South-Korea's worldwide visibility. For the solemn Mass celebrated by Pope John Paul II, about 650,000 Catholics from about one hundred nations crowded Yeouido square in Seoul (Dongseong Kang, 1989, pp. 4–16).

Kyeonghyang Magazine noted increasing church construction works due to the Catholic boom with 'Haneunimui jip, ireoke jitja' (Let's build the house of God in this way) in August 1991. This section consisted of six articles mainly on the problems and solutions relating to church architecture and construction. The article of Jung-shin Kim looked through major issues concerning Korean church architecture in the 1980s, such as enormous building sizes, the lack of symbols in interior space and the need to express national identity with contemporary architecture, as well as the ignorance about church architecture among the clergy, lay leaders and architects. Cho Kwang Ho (1947–), a Benedictine priest and painter, suggested that the ideal church architecture should represent the conversation between God and his people rather than the monologue of architects. The other four articles written by parish priests and a lay pastoral worker covered more specific subjects, such as fundraising and an exemplar church construction project (Jung-shin Kim et al., 1991, pp. 14–39).

Space looked into the widespread preference for imitating Gothic style among Catholics. In February 1989, *Space* ran an article based on an interview with architect Kim Young-sub (1950–). Jung-shin Kim, the interviewer, regarded Kim Young-sub as a crucial figure in Korean Catholic church architecture in the 1980s. During the interview, the architect regretted that some of his church designs had compromised with the uncritical pursuit of Gothic style in the Korean Catholic Church. He viewed that the turbulent national history before the end of the Korean War did not allow the Church to have enough opportunities to systematically review the style. Nevertheless, he stressed that church architecture should use contemporary architectural languages to adapt to the changing spirit of the Church in new eras (Y. Kim & Kim, 1989, pp. 64–81).

Additionally, *Space* looked through general challenges in Korean Catholic church architecture with 'Hanguk gyohoemisurui oneulgwa naeil' (The today and tomorrow of Korean church art), an article in March 1994. This article summarised five presentations at the seminar of the same title, held by CAUS in the previous month. In this seminar, Cardinal Stephen Kim Sou-hwan stated that despite the quantitative growth of the Catholic Church, church art and architecture should still be improved to express Korean, religious and universal values. Jung-shin Kim listed the issues of Korean Catholic church architecture since the 1980s, including the inconsistency of theory and practice and of function, structure and form. Architect Kim Won criticised the chase for large, luxurious and fast church construction, which resulted in the massive increase of low-quality church buildings (Space's editorial department, 1994, pp. 83–89).

Meanwhile, *Monthly Architecture & Culture* concluded its column 'The Catholic Church Architecture in Korea' in July 1986. In the last column, Jung-shin Kim described three new distinct features of Catholic church architecture in the third century of the Church and critically pointed out that positive results were not always guaranteed. The first feature was the massive scale which would provide one thousand or more seats. The second one was the adoption of Post-modern style to break from the dominant appearance and to harmonise with surroundings. The last feature was the worship space with less hierarchical divisions and the multipurpose use of church buildings to perform diversified roles in contemporary societies (Jung-shin Kim, 1986, pp. 100–103).

The December 1990 of *Monthly Architecture & Culture* concentrated on the lack of sacred dimension in Korean Protestant and Catholic church buildings through 'The Expression of Holiness: Churches in Korea', a special section composed of five articles. In one of them, architect Kim Uk-joong (1955–) chose two Catholic churches and looked into why they could not fully realise the holiness of their altars. In another article, Lee In-yong from Junglim Architecture, an architectural design firm, compared Korean Protestant churches with the Korean Catholic churches and commented that the latter could retain holiness in a more positive way. He mentioned several Catholic advantages such as the respect for local traditional culture, the centralised system, and theological changes reflecting the times (Chung et al., 1990, pp. 127–154).

Conclusion

Based on the articles from three prominent magazines, this research verified that the 1984 bicentennial celebration of the Korean Catholic Church developed the styles, distinctiveness and influence of national church architectural discourses. The bicentennial celebration, indeed, facilitated new church projects by creating the commemorative church construction boom and by publicising Catholicism, thus contributing to rapid Catholic population growth. More church projects brought more elaborate methods for generating discourses such as comparing multiple church designs of different architects or denominations, or addressing common challenges and solutions in church architecture.

Furthermore, the bicentennial celebration encouraged the authors and readers of Korean church architectural discourses to reflect on national identity in church art and architecture. The commemorative international art exhibition enabled them to view the works of Korean artists and architects in international perspective, while the commemorative exhibition of CAUS expressed the effort to develop national identity. The roots of church architecture were explored through the special bicentenary column on the history of Korean Catholic church architecture. This quest for national identity continued in post-bicentennial church architectural discourses.

Additionally, the 1984 bicentennial celebration allowed the church architectural discourses to affirm its specific significance in general Korean architecture. The special column on the history of Korean Catholic church architecture stated the essential position of its topic in national modern architectural history. The commemorative heritage preservation work on the Myeongdong Cathedral made the building an exemplar case of early Western-style architectural heritage in Seoul. The elevated stature of national church architecture is also shown in the increase of discussions on related problems and considerations in architectural magazines after the bicentenary.

In October 1994, the memorial church in Jeoldusan Martyrs' Shrine was given the Space-Time Award 25 by the Space Group. In a review in *Space*, Kim Bong-ryol (1958–), a jury member and architectural historian, highly appreciated the design and work of architect Lee Hee Tae. His comment was against Lee Hee Tae's previous reputation that considered him as a marginal architect (B. Kim, 1994, pp. 113–117). This reveals that by 1994, the appreciation of Korean church architecture was

developed sufficiently enough to generate a new perspective which would challenge a prevalent view in general architectural discourses.

The development progress of specific church architectural discourses reflected the growing status of the Korean Catholic Church and its church architecture. It also revealed inevitable issues following their rise as well as ideas to deal with relevant challenges. Looking into the evolvement of these discourses, therefore, could be useful to the Korean Catholic Church and other Christian denominations for predicting how religious prosperity could affect their twenty-first-century religious art and architecture. Based on this anticipation, they could prepare short-term and long-term plans for conceiving, adapting and promoting their sacred architecture.

Acknowledgements

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Bapsi Sidhwa's Water: A Novel:
The Widows in Subjugation, Revolt, and Jouissance

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Abstract

In this paper I will focus on Bapsi Sidhwa's *Water: A Novel* (2006), based on the film by Deepa Mehta. The film deals with the problematic theme of love and remarriage, but Sidhwa focuses more on the forbidden theme of widows' sexuality in a variety of ways. I will examine how she successfully shows that the widow's body is a space in which the contradictory meanings of her sexuality are exploited for the convenience of a patriarchal society.

Keywords: Widow, Sexuality, Religion, Forbidden Love

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Introduction: Widows as the most Marginalized Beings

Indian writers give various voices to battered "husbandless" women living on "the margin of society" (*Difficult Daughters* 258). This "husbandlessness" is the key term, indicating how a woman is marginalized and becomes the victim of cruel violence. And among "husbandless" women, widows are the most marginalized beings, as seen in the tradition of forced suttee. According to Uma Chakravarti and Preeti Gill, editors of *Shadow Lives: Writing on Widowhood*, an anthology of laws, documents, personal narratives and fiction on widows between 500 BC and 1997, the widow is "denied of personhood" and is spoken of "as if she were a piece of stone" and referred to as "that" or "it" (Intro. 10). In short, the widow integrates all the discrimination against women in India, and many Indian novels describe battered widows.[1] Sunil Gangopadhyaya's *Shei Samai* [*Those Days*1997], for example, is a masterpiece about a young widow written in Bengali; it won the Sahitya Akademi award.[2] In Salman Rushdie's *Midnight's Children* (1981) we see women who lead wretched lives in an asylum in Benares. However, just a few English novels deal mainly with the issue of widows: Bharati Mukherjee's *Jasmine* (1989), Aruna Chakravarti's *The Inheritors* (2004), Githa Hariharan's short novel "The Remains of the Feast" (1992) and Bapsi Sidhwa's *Water: A Novel* (2006). In this paper I will focus on Bapsi Sidhwa's *Water: A Novel* (2006), based on the film by Deepa Mehta.

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[1] In *The Inheritors*, Radharani becomes a widow at the age of sixteen, suffers from mental illness because of her harsh life, and throws herself into a well. She is just one of many widows described in *The Inheritors*. Chakravarti goes on to portray the harsh lives and cruel fates of various widows of an old family which traces its lineage back to N. B. D. Sharma, and of families related to it, in a superb style of her own. Bharati Mukherjee, an American originally from Bengal, is known as a writer who tries to create "a new immigration literature," as she describes immigrants and women challenging traditional women's roles. Noticeably, *Jasmine* presents a protagonist who does not resign herself to her fate as a widow but takes action to change it. Jyoti, who is widowed at seventeen, decides to go alone to the U. S. without a job or money. Born in the village of Hasnapur in Punjab, she gets married to a liberated man who advises her to be educated to be a new woman (Jasmine is the name her husband gives her, meaning "a new woman"). He is involved in a terrorist attack by Sikh fundamentalists and is murdered. Thus, Jasmine is exposed to a society which discriminates against widows. Jyoti is bold enough to violate the traditional code for widows, which is a rare case among such downtrodden women. Jyoti's mother is also a widow, and the two live in an ashram, "the widow's dark hut" (96), a place they can keep company with other widows. Her mother had tried to throw herself on her husband's funeral pyre but was stopped by her daughters. She shaved her head, "wrapped her body in coarse cloth, and sat all day in a corner. Once a day I force-fed spoonfuls of rice gruel into her" (61). Thus, surviving means she experiences a living hell. On the other hand, Vimla, a girl from a wealthy family in the same village, whose father could give away a Maruti (a Japanese car) and a refrigerator in the dowry, and who enjoys the fanciest marriage ceremony the village had ever seen, also finds herself a widow when her husband dies of typhoid, and instead of enduring she embraces self-immolation: "At twenty-two she doused herself with kerosene and flung herself on a stove, shouting to the god of death, "Yama, bring me to you" (15). *Jasmine* shows how women become the victims of dowry murders, or are punished and abused because of their disobedience or barrenness. Mukherjee's story counters all this by focusing on a girl who smuggles herself into the United State to change her fate as a widow, thus challenging a society which discriminates against women and denies human rights to widows.

[2] Gangopadhyay's Bengali novel, *Those Days* tells a similar story of how a widow's body is abused. Bindu, the protagonist, is very intelligent with a great love of learning. She enjoys studying with Ganga, her playmate from infancy, but after being widowed, like other many women, she has become a captive in a rich man's harem. With difficulty Ganga finds Bindu who has been drugged, and persuades her to run away with him in vain. After telling him how she wants to kill herself, she hesitates, because she knows she is pregnant, but finally she leaps into the river.

"The Remains of the Feast" is a story of an old widow, who suddenly revolts against Brahmin culture by violating a food taboo. Unlike other stories of battered widowhood, Hariharan's "The Remains of the Feast" does not tell how a Brahmin widow had been suffering, but her great grand-daughter's metaphorical rebirth as a narrator breaks the silence of the untold story of a Brahmin widow's life in the context of mother-and-daughter fiction. In this sense, Hariharan's narrative is very unique and subversive.[3]

Water: A Novel deals with the reality of widows in 1930s, and gives a detailed explanation of discriminatory practices and attitudes toward widows, which are still retained in a contemporary Indian society. On the other hand, "The Remains of the Feast" focuses more on the protagonist widow's revolt against patriarchal dominant Brahmanism in a contemporary Indian society in the context of a mother-and-daughter fiction. Rukmini, an old widow in "The Remains of the Feast" does not say anything about deprivation of her sexuality as a widow. On the other hand, *Water*: *A Novel*, which delineates the reality of widow's asexual life, clarifies what Rukmini's silence means, strengthening the significance of the widow's suppressed narrative which is told through her dying body.

Strikingly, Sidhwa focuses on the sexuality of widows in her novel. The film deals with the problematic theme of love and remarriage, but Sidhwa focuses more on the forbidden theme of widows' sexuality in a variety of ways. I will examine how she successfully shows that the widow's body is a space in which the contradictory meanings of her sexuality are exploited for the convenience of a patriarchal society.[4]

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[3] "The Remains of the Feast" is also a story of an old widow who suddenly revolts against Brahmin culture by violating a food taboo. What overwhelms us mostly here is not the body as an object of desire and hatred but the revolting body. A 90-year-old Brahmin woman, Rukumini, suddenly revolts against Brahmin culture by violating a food taboo. Her great granddaughter, Ratna, narrates all the details of the blissful moment when Rukumini deliberately deviates from the taboo and experiences the "Forbidden Fruit" (the original title of the first publication). Ratna's compassionate gaze at her great grandmother's hungry-ghost-like body constitutes the story of the rebellious body, the body of jouissance, fighting against the dominant culture in India, the source of the suppression of women. To violate a food taboo suggests that Rukumini rejects the passport to heaven this system guarantees to those who keep the rules codified in *The Laws of Manu* (5:4-5). Women's texts must be "subversive," says Helene Cixous in "Laugh of the Medusa," and Hariharan's text almost attains subversiveness, but this is reversed when the absent mother is transformed into a ghostly presence, a dominating voice, so that the daughter is cocooned in the deadly space of numbness. However, there is another turn of the screw, which entices us to reread from the ending toward the beginning, a cyclic rereading. Ratna airs the rooms at the ending, and the beginning follows the ending: "The room still smells of her." This text, in other words, forms a circle. Two key terms, "room" and "smell," lead us to a rereading. Though the room still smells of her, it is already "a dry, elusive smell, and "burnt" (9). Here begins again Ratna's narrative of her great grandmother's revolt, and the absent body is no longer the abject, but the source of the daughter's narrative, the female "voice." The lost object gives the daughter representational power, in an anti-Lacanian paradigm which sees the existence of women as the desiring subjects in the Symbolic order, and she tells the story of the rebellious maternal body and regains union with her through narrative. Ratna's rebirth as a narrator breaks the silence of the untold story of her great-grandmother's life, achieving a subversion in the very telling.

[4] To control the sexuality of women is necessary for sustaining the patriarchal system, a caste hierarchy convenient for Brahmins, and for controlling the system of inheritance rights convenient for men, according to Joanna Liddle and Rama Joshi, the authors of *Daughters of Independence*.

*Water: A Novel***: Socially Ostracized Widows**

Now, I would like to look at how widows are represented in Bapsi Sidhwa's *Water: A Novel*. It is faithful to the original, *Water* directed by Deepa Mehta and we can find the exact same words as in the film. However, Sidhwa often gives a good explanation of the reality of Indian widows, which is subtly suggested but not clarified in the movie. As Sara Suleri Goodyear states in a blurb on the book jacket, Sidhwa "provides speech [when] the film must leave the women speechless." Sidhwa also gives a voice to a child widow's mother (Chuiya's mother), who is absent from the film, thus creating a mother-and-daughter narrative, and she adds stories of some widows' pasts, which are impressive in their vividness, as they help us feel their individuality before they become widows.

Chakravarti and Gill refer to the controversy over the shooting of the film *Water*:
> [A]t the beginning of the 21st century Hindu men are still trying to deal with the emotions of guilt, fear and embarrassment evoked by the figure of the young widow. Why else should a film on Hindu widows, located in the 1930s, lead to such a strong reaction...? These men seem bent on the] recovery of the ancient greatness of the Hindus whose icon is the chaste sati, refusing to be a widow, capable mounting the pyre with a smile on her lips. The sati remains the essence of Hindu womanhood even as its practice has been banned since 1829. Since real widows, ekeing out a miserable existence in Varanasi, Mathura,...or in innumerable homes across the country, discriminated against and often subjected to violence, are a continuing presence in Hindu society, …. Widows must therefore be banished from the public sphere at any cost….However much one tries to erase the figure of the widow, she is very much there, especially in the social memory, as well as in the individual memories of most Hindu households—an aunt, a sister, a grandmother.…Was she exploited by us?(3)

Thus, the shooting of the film *Water* which deals with a young widow's tragic love evoked Hindu men's feelings of guilt and fear. Here I would like to focus on the reference to the widows' sexuality rather than on the suffering caused by the cruel prejudices and taboos which necessitate their "social ostracism" and "violence at the hands of relatives." Chakravarti and Gill say that widows are considered "sexually threatening" (3), yet it is the cruel reality of their social standing that attracts our concern. Strangely enough, their argument and the film *Water* do not clarify the way the widow is thought to be sexually threatening. This elusive vagueness seems to cause some difficulty for non-Indian audiences. Though the artistic subtlety of the film representation is in some ways praiseworthy, Sidhwa's novel clarifies that the widow is doubly cursed, burdened as she is with the evil image of voracious Eve. Let us look in more detail at how Sidhwa's novel describes this contradictory status of the widow's sexuality.

Contradictory Status of the Widow's Sexuality

Sidhwa's novel tells the story of Chuiya, a child widow, and of other widows around her who are sent to an ashram by a river in Rawalpur. The story is set in 1936, a year of radical change, when a law allowing widows to remarry had just been passed, and when Gandhi was leading a mass movement for freedom from British rule. Two

important figures console Chuiya in her homesickness, Kalyani, another young widow, and Shakuntala, a pious woman who plays the role of caring mother.

This is also a forbidden love story of Kalyani, which tragically ends with her suicide. Kalyani is the only widow who is permitted to avoid shaving her hair, that traditional humiliation which suggests the deprivation of femininity and sexuality. This means that Kalyani is placed in a position which isolates her from the other widows. She is sent to so-called clients, the Seths, across the river, by Madhumati, the boss of the ashram. She falls in love with Narayan, a liberated Hindu young man who supports Gandhi's views and leadership. However, on the way to his parent' house across the river, she learns that one of the clients is her lover's father. She finds no course of action other than committing suicide, because she cannot return to the ashram, which is no different from a whorehouse for her, nor can she "saddle Narayan's noble family with a daughter-in-law whose every living moment would bring disgrace and dishonour to their house" (176).

Chuiya's sexuality is also an important part of the story. After Kalyani's death, Madhumati, a bossy figure who manages an asylum for widows takes advantage of her ignorance and homesickness and sends her to a client's house. Shakuntala, who is frantically searching for the missing Chuiya, finds her on the boat with Gulabi, a hijura procuress. With fury and fear she realizes that Chuiya had been drugged, and with horror she realizes the brown patches on Chuiya's neck and calves are "congealed blood from cuts and wounds" (190). Shakuntala's faith has not wavered for many painful years, but Kalyani's death, Chuiya's abused body, and Gandhi's words, "Truth is God" instead of "God is truth" (196), which "hummed in her head," shake her convictions. Shakuntala decides to follow not her faith but her conscience and her love for the poor child. She makes frantic efforts to put her in Gandhi's care.

Through Shakuntala's doubts about the status of widows and the governing rules and taboos widows have to suffer, Sidhwa shows the problematic relationship between a woman's discrimination and her religion, or rather the tradition which benefits Brahmins "disguised as religion" (181), as Narayan puts it. Sidhwa gets to the heart of the problem of how a widow's sexuality is suppressed, or cursed, or abused for the convenience for men.

Narayan is disgusted with his father's hypocritical words: "Our holy texts say Brahmins can sleep with whomever they want, and the women they sleep with are *blessed* (italics mine, 174). He feels pity for his mother, who "*must have known of his tawdry infidelities: how could she tolerate them?*" (174). He also remembers what Rabindra, his friend, has pointed out, "the Seths of Rawalpur seemed to fancy widows" (174), suggesting that this is not a special case. What is contrary to logic is given an ironic charge as the subject of religion. The widow's body, which should be asexual, is assigned the role of a seduced body, full of voracious desires, and Narayan's father's selfish, unfaithful body is seen as possessing the power to bless the inauspicious widow's body.

We can also see how the widow's sexuality is abused through the story of the assaults Madhumati suffers after her husband's death. She is raped by her brothers-in-law for a week, and "shorn and beaten and taken twenty miles into the wilderness and discarded!" (70). Gulabi finds her "covered in blood and half-dead from starvation,

lying in a ditch on the edge of the forest" (70). With the help of the head of the ashram, Madhumati aborts "the foetus resulting from rape," but after two weeks she is taken to a "client" (71).

The widow is not permitted to wear ornaments and colourful saris. She also has to shave her head. In this way, her body is deprived of femininity and sexuality, being codified as an asexual being, or dehumanized nonbeing. However, this deprivation itself evokes a Brahmin man's "unnatural concern" or hypocritical desire. In fact, Rabindiran's father is indiscriminately interested in widows of all ages and physical appearances.   Thus, the widow, whether she is young or not, is labelled as dangerous because it has power to allure men.

Substantial Bodies of Widows

Sidhwa also positively delineates the widow's body with power to allure men not only through Kalyani's but also through other widows' bodies. Sadananda, a priest who preaches widows, is "overwhelmed by their bodies, ripe beneath coarse, loosely-spun saris that stretched to accommodate each curve and dent of their desirable flesh" (78). Here we find not the shadowy widows' bodies but the substantial human bodies which cannot be annihilated by any suppressive system and laws. Sidhwa also leaves a clear message that a girl's self-chosen sexual maturity should not be hindered through Chuiya's mother's fury at her husband who decides to marry her daughter to an old man.

Conclusion

Indian writers and writers of Indian origin have tried to expose the cruel reality of the tragedy of widowhood in different ways. While they focus on the suppressed widows, Rabindranath Tagore challenges the taboo theme of widow's love and sexuality in *Binodini: A Novel* (1903). The title character is a widow who is indignant about the reality of a widow's life. She rebels against social conventions. She is not initially stereotyped as a dangerous woman because she is fearless and able, armed with keen insight. Her aspiration to love and her painful experiences are delineated in full detail. However, her way of obtaining love is finally seen as selfish and wicked.

Sidhwa more daringly deals with this taboo theme of widows' sexuality than the other writers. The widow is forced to live as an asexual being, however, Sidhwa positively delineates the widow's body with power to allure men. She also challenges to delineate the widow's body in jouissance through Kalyani's love, though it was aborted.

Sidhwa also successfully shows how the widow's body is a space in which the contradictory meanings of her sexuality are exploited for the convenience of a patriarchal Indian society. The widow's body is deprived of sexuality, being codified as an asexual being, and this deprivation itself evokes a Brahmin man's desire. The widow's untouchable body is, according to Narayan's father, "blessed" when she sleeps with a Brahmin man. Thus, his infidelity and desire for the tabooed body are justified from both social and religious perspectives. Sidhwa successfully makes this troublesome truth visible in her novel.

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Difference as the Source of Polarization among Right-Wing Populist Parties

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Abstract

Just as difference can be a source of innovation, so it can be a source of polarization, too. And even more so when the difference is used as a tool to achieve certain goals. It is thought of the political area, specifically of the European right-wing populist parties, where the difference belongs to often raised content element. The difference is, on the one hand, viewed as the delimitation criterion in the context of the horizontal plane and, on the other hand, in the context of the vertical plane. In the first case it is about the demarcation of the party, its representatives and its voters in relation to "special" groups but within the nation, in the other case it is about their demarcation in relation to (the groups of) other nations. In this study the concentration is on the second level. As a representative example being subjected to analysis the Freedom Party of Austria (FPÖ). However, the actors of the propagated difference are not the active politicians, but the politically engaged youth of this party. The audiovisual material that these young people published will be used as an empirical basis. The analysis is intended to show the sensitivity or perhaps the intensity with which this politically active youth reacts to this relevant topic.

Keywords: Right-Wing Populism, Cultural Differences, Polarization, Youth Organization(S) of The Freedom Party of Austria (FPÖ)

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Introduction

The difference of something or someone in relation to another is directly related to exceptionality. It does not necessarily have to be anything excellent or worthy of recognition. Here "exceptional" is understood as unique, where its peculiarity contributes to diversity and so is enriching. It is clearly something positive when understood in this way. But difference can also be a source of disagreement, especially when it creates a feeling of insecurity, danger or fear. In that respect, it may also become the means of currying favour among "the weaker" seeking in someone protection, assistance and support.

The "difference" discussed in this paper can be seen in all the above intentions. In order not to be sidetracked into research that is currently not relevant or up to date, the primary interest specified by us is cultural differences, otherwise described as cultural diversity. For an even narrower definition, stress needs to be placed that the interpretation of cultural diversity is not from the perspective and in respect to the relationship here in Slovakia, but rather from politically engaged youth in Austria. The discussion involves the youth organisation of the Freedom Party of Austria (FPÖ), Austria's right-wing populist party, specifically the *Freiheitliche Jugend Österreich* (FJ), also known as the *Ring Freiheitlicher Jugend Österreich* (RFJ), which has branches in all of Austria's nine states. The organization in Upper Austria (*Freiheitliche Jugend Oberösterreich*, known by its acronym FJOÖ), is especially extremely active in media and, for this reason, it was chosen for this analysis. Although this youth organisation is characterised as a political grouping that does not solely act politically, it generally endeavours to promote the views, wishes and opinions of young people in the political sphere. Ultimately, the empirical material that is in the centre of our attention suggests the organisation orients itself toward supporting the FPÖ's political platform and activities. From its background, the cultural diversity outlined in the empirical material should head toward realising the intention expressed by the political party the group currently supports. Taking into account that the videos originated from the youth organisation and its younger generation members are going to be its primary viewers, it can also be envisaged how they share and form opinions both reflecting them and accordingly how they adequately argue the opinions they have formed.

The audiovisual material comprises large-scale videos covering various periods of time that the FJOÖ used to post on its own official website (http://www.rfj-ooe.at/) and on the FPÖ's official YouTube channel (https://www.youtube.com/c/fpoetv). These videos were simultaneously shared on the national youth organisation's Facebook account (https://www.facebook.com/pg/FJOesterreich/about/?ref=page_internal). These efforts enabled the videos to spread through social networks between 2013 and 2018 (following the project) and be seen by both knowledgeable viewers and visitors that had randomly discovered them. Because of limited space, only a few selected videos are given attention. They and excerpts from them were comprehensively analysed, with no particular concentration given only to a specific component such as visuals, graphics, motion, sound and non-linguistic means of expression. In the absence of illustrative material, it should be pointed out that not all of the components of the audiovisual material are able to be exemplified in the paper.

"US/OUR HOME" vs. "YOU/FOREIGNER" – cultural diversity in the eyes of right-wing populists

Respect for cultural diversity is a promise, often a strong demand, and in the educational process a long-term objective. This is because "opportunities, resources and power are not equally distributed in various countries and their societies among the diverse groups of people that live there, usually defined by their race, ethnicity, culture, religion, gender, sexual orientation and physical (or mental) disabilities" (Hirt, 2005, p. 2). Even though the need to respect cultural diversity is grounded, in principle, on uniform arguments heard everywhere, both individuals and groups of a different nature and varying reach have been found that either fail to respect such a need at all or do not respect it across its full range. For various reasons, they challenge selected groups. Thus, cultural diversity can become in instrument to manipulate popular opinion. It may encounter a number of negative reactions, and ultimately may polarise society. Such groupings also include several active political organisations. The political parties connected with the issue examined here are characterised as right-wing populist.

In recent years, right-wing populist parties have become a relatively strong force in politics and their expanded voter base has enabled them to crystallise their positions. Yet this stabilisation has to be seen in both the context and impact of socio-political events in the countries where they have become stronger, especially in the last decade. Perhaps the phenomenon most resonating among their voter base is the "migration crisis", which has turned into one of their central themes, due to the predominantly negative consequences it has brought in various areas of social life. Highlighting patriotism, one of the key elements which underlie right-wing populism, provides at least in part an understanding of the differences of opinion and often even the "callous" approach populists take toward the issue. This implies other characteristics of right-wing populism, in particular its connection to the polarisation of society at the horizontal level, expressed as "us versus them" and as "acceptance" of cultural diversity (Štefančík/Hvasta, 2019; Priester, 2019; 2017; 2012; Spier, 2006 and others).

Patriotism is a central ideological element of (right-wing) populist parties. It is also one of the most dominant aspects in terms of how frequently it has been evident in the platform, especially in the graphic elements found in campaign media. (See an analysis of campaign posters produced by the FPÖ in Demčišák, 2019.) Relying on the definition of patriotism, which characterises it as "the feeling of love, devotion and sense of attachment to a homeland and alliance with other citizens who share the same sentiment", this attachment and the need to protect the homeland's interests may combine many different feelings like historical background, culture, traditions and language (https://en.wikipedia.org/wiki /Patriotism), it is clear that a broad area has actually opened up to express it, without necessarily referring to any "foreign" or "other" groups directly associated with them. Both methods can be identified in the FPÖ's election posters and each of them plays a critical role.

"Other groups" means in this context the distinct groups occupying the destination country of the countries they are transiting, whose origin, culture and religion make them different. The earlier mentioned migration crisis in Europe has turned refugees

and migrants into representatives of these groups. "Other/foreign" groups have been assigned a certain status within the country's overall socio-economic structure reflecting the consequences that have arisen from their arrival and the degree of their impact on the destination country and the countries they have transited to reach it. These consequences are seen through the eyes of "the ordinary people that have always lived here" and also through the eyes of whomever they perceive as protecting the nation, its territory, the system under which it functions and its values. Concurrently, a characteristic of right-wing populism is how it has been spawned by negative events whose participants are directly the members of the groups in question. They not only explicitly magnify these events, but also usually generalise an entire ethnic or religious group as the cause of them, which escalates the already existing polarisation of "us versus them". Their point of view emphasises the negative perception of groups ethnically, and thus also culturally and religiously different, should they endanger in any way the safety and security of the destination or transit countries, the majority nationality and their cultures. The aversive attitude taken towards these groups, at the least by advocates of right-wing populism, is amplified by the negative experience associated with them, whether on behalf of an individual or a larger group.

Cultural diversity and its themes expressed by the *Freiheitliche Jugend Oberösterreich* (FJOÖ), exemplified by its audiovisual material

This section analyses and considers videos produced by youth organisations, focusing in particular on videos which were used as campaign material during the five-year period (2013-18) mentioned in the introduction. These videos were deliberately chosen because of how the originators paid special attention to how they would be introduced to the public and subsequently shared in order for them to reach a large number of viewers and go literally viral over time. The central aspect noted here is the theme of cultural diversity. The objective is not to analyse how the videos are structured, but to make it clear that such components are not going to be avoided when examining the issues earlier mentioned in this paper.

The characteristic feature of the videos is how they combine their two main components: an image or, more commonly, a sequence of images captured in quick succession along with the sound or audio recordings. A video can be composed of still images like photographs and various graphics, or be comprised of dynamic, moving images (Burger & Luginbühl, 2014, p. 409-410). In the case of an audio recording, it could be a speech with the speaker appearing directly in the video or it may involve a different person (in the analysed videos a youth organization member, sympathiser, or just an ordinary actor may appear), or the video itself might be narrated by a "neutral" person speaking in the background. Recorded music may likewise also be heard. Some parts of the video might not show the presence of speech and is therefore supportive, while other parts may have underlying musical accompaniment, yet with the clear task of inducing from the viewer the desired emotional setting. If we capture musical elements sketching the nature of the analysed video, then attention will be drawn to them at least in the context of the issues appearing here.

Before analysing the videos themselves, it should be pointed out that the videos are nevertheless the product of a politically engaged youth organization, so it is

anticipated that specific elements were strategically applied when the video was structured. Finally, intent is indicated in the campaign platform and this plays a direct role in both the audiovisual media and other forms of campaigning. One of them characterises the campaign as "a planned series of activities intended to achieve a particular aim" (https://dictionary.cambridge.org /dictionary/english/campaign). If the theme of the videos is cultural diversity, then consideration should be given to how information about the issue and the facts behind it can be preceded by a clearly defined goal, mainly for the video to be seen by as many viewers as possible. This might lead the producers of the video not only to think about how the content should be viewed, but also to direct these viewers' thinking in the desired direction. This paper has already touched upon the issue of interpreting these videos. Because they originate from a strategic selection of verbal and nonverbal components, viewers are given a "key" to narrow their own interpretations. The videos' persuasive nature is felt in the intentions behind such a perception of language and non-verbal means and similar both to what political parties and their similar-type activities do and what is applied audiovisually by the FPÖ's youth organizations. The following analysis provides evidence of this.

The FJOÖ organised a campaign during the summer of 2015 in the spirit of *"Das Wasser steht uns bis zum Hals"* (Water up to our necks). (http://www.rfj-ooe.at/kampagnen/) The negative campaigning is reflected in the slogan, notwithstanding its strategic presentation alongside an attractive young woman in a bathing suit (see Figure 1) whose image is displayed in parallel with water literally reaching up to her neck and the words of the slogan expressed in a serious tone of voice. An important element is the introduction of music heard in the background. The dynamic, largely weighty melody underscores how severe the situation is, indicated by how the video uses the idiom to illustrate it.

[Zeit: 0:03 / „Das Wasser steht uns bis zum Hals" (Water up to our necks)]
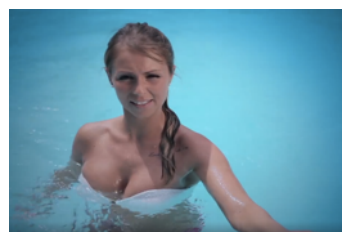
Figure 1

After the introductory "word play" and the contrasting use of various elements, a series of clips follow that depict the problems outlined in the opening idiomatic connection. The narrator, who is not any of the actors appearing in the images, explicitly mentions the problems and how they originated. Attention is drawn to the closed-ended questions the narrator "poses" to a potential viewer starting with *"Wusstest du...?"* (*Did you know…?*). A characteristic feature of these questions is they invite no discussion. Instead, they are used in the video to push facts already evident to viewers on the ground without any effort to show all sides, which also eliminates any potential threat of fact-checking. This is emphasised by questions starting with the German equivalent of *"Did you know?"* and in a sense also interpretable for the allegation of *"If you didn't know,…"* The next clips (see Figures 2-5) illustrate the negative impact of another nationality and culture arriving.

[0:07 / Narrator: „Wusstest du, dass Tausende neue Asylwerber nach Österreich kommen werden, während die Politik nur schweigend zusieht?"
(Did you know that thousands of new asylum-seekers are pouring into Austria, while the politicians are just watching it all silently?)]
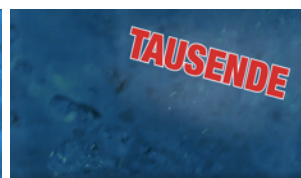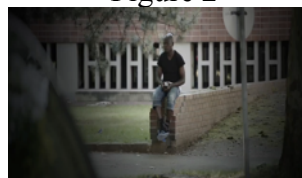

Figure 2

Figure 3

Figure 4

Figure 5

The negative perception the organisation producing the video seeks to evoke is evident in the word *"TAUSENDE"* (see Figure 3). It is highlighted typographically in a contrasting colour, whose context negatively expresses a multiplying of the negative. The blue background depicts water, the symbol in the initial slogan, and this is an effort to magnify the problem. The narrator, speaking as the shot appears, points out a group of people hiding behind the word "*Tausende*" and completes the question by asking if the viewer knows how many asylum-seekers are pouring into Austria. The question implies someone else arriving in your country, that they will be new and there is going to be a large number of them. Interestingly enough and looking at the number of possible camera angles, the video's visualises "thousands of asylum seekers" with camera shots of an idle asylum seeker sitting on a wall (see Figure 4) and a tent camp temporarily accommodating them in the destination country (see Figure 5). The first case highlights his inactivity to shed an unfavourable light upon the entire community and the second case indicates another problem associated with asylum seekers, namely how to provide them with the necessary conditions to satisfy basic living needs, which undoubtedly includes adequate housing. Other nationalities and cultures are perceived and portrayed negatively right from the start as seeking to become part of the country's socio-economic structure with actually doing nothing.

The video campaign continues, again asking the question *"Did you know…?"* to viewers. This time, cultural diversity is thematically richer, particularly in how it is visually expressed through photographs and short audiovisual records incorporated into the video.

Figure 6

[0:15 / Narrator: „Wusstest du, dass du bald fremd im eigenen Land werden wirst?"
(Did you know that you are going to become soon a foreigner in your own country?)]

Figure 7

The video employs a strategy of intimidation from a foreign culture's potential domination. Figure 6 shows an image of women walking down a street in head scarves resembling burqas, a garment worn by many adherents of Islam, while the word *"FREMD"* ("foreign") stands out again both typographically and in a contrasting colour. The same work can be applied to the second clip, a short recording from the video, which captures Islamic worshippers in prayer. Without the narrator's accompanying comments, a viewer might think the word to refer directly to a depiction of a slice of non-linguistic reality, while spelling out the cultural differences as something foreign to his or her own culture. Looking toward the rear of the women walking eastward (and supposedly out of the country) in the clip shown as Figure 6, there is even some idea of the further direction to be taken by asylum seekers from another nation and culture. However, the narrator's question to the viewer changes the perspective of those participating in this visually and verbally rendered creative piece. The word *Fremd* (outsider in this context) is not and will not be a reference to other nationalities and cultures, but for those living in the homeland, the so-called "us", to refer to them. This multiplies the potential threat from asylum seekers in the viewer's eyes, resulting in disrespect and rejection of foreign cultures and, in specific cases, even averse or hateful attitudes.

The negative consequences of the influx of asylum seekers are further discussed below. Jobs lost because of efforts to integrate asylum seekers and to help them find employment, plus the indebtedness of "us" and "our children", reflect the social assistance provided to often passive asylum seekers and also some of the most pressing topics exploited, at the very least, to provoke outrage and fear of a possible negative scenario from the arrival of another culture. The following footage is illustrative:

[0:20 / Narrator: „Wusstest du, dass du bald arbeitslos sein könntest?"
(Did you know that you might soon be unemployed?)]
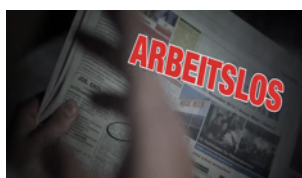
Figure 8

Figure 9

[0:25 / Narrator: „Wusstest du, dass du mit 38 Tausend Euro verschuldet bist?"
(Did you know that you're already €38,000 in debt?)]

Figure 10

Figure 11

The video campaign closes with the narrator repeating the video's introduction *"Also das Wasser steht uns bis zum Hals."* (So the water is up to our necks.) Now the German adverb "also" ("so" in English) has been added and it plays an important role. Instead of asking the viewer a question, the narrator concludes the video by telling how serious the situation is. The adverb "also" comments on all the facts and arguments that have been described in the video possibly having fatal consequences for society.

Like in the previous year, the 2016 summer campaign was characterised by imaginativeness, but also saw the use of provocative visual elements. Figure 21 shows

the dominant feature of the 2016 campaign, a catchy rhythmic verse of *"Sommer, Sonne, Wasserball, ich werde nicht zum Einzelfall"* (summer, sun and playing with a ball in the water and I'm not going to be an exception). The video shows female figures and specifically the parts normally ogled and occasionally the target of sexual assault. Even though a campaign that provides a touch of eroticism, the focus is on violent crime committed by nationalities from different cultures mainly against female victims. The images and photographs of the beautiful women contrast with the foreigner verbally and explicitly expressed as dangerous and evil. No one narrates the campaign video, but rather the images change at a fast pace in time with the dynamic popular music playing in the background. The musical accompaniment has the nature of a summer song, with a rhythmic melody that reinforces the atmosphere the video displayed and draws viewers into the story. Violent crime is verbally given a specific expression, with the video showing headlines of sexual attacks in Cologne (see Figure 13) and at a children's swimming pool in Linz (see Figure 14), of an Algerian knocking his wife unconscious (see Figure 15), of a drunk Afghan man offending a young girl in a swimming pool (see Figure 18) and sexual attacks of children and teenagers (see Figure 19). The video also indirectly underlines polarised opinions about these groups, specifically questioning whether the cases are truly exceptional (*"EINZELFALL?"*). Placing a question mark after the word stresses that the specified cases are not necessarily exceptional, but instead tend to be a relatively regular phenomenon. Simultaneously, the campaign calls on female viewers not to make themselves an "exception" and to take self-defence courses the youth organisation has set up (see Figure 21).
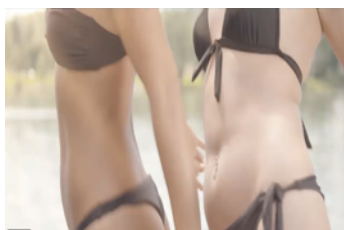

Figure 12

Figure 13

Figure 14

Figure 15
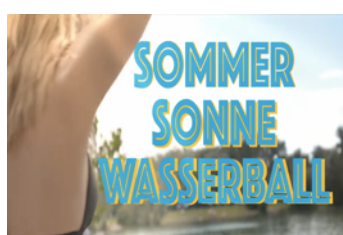

Figure 16

Figure 17

Figure 18

Figure 19

Figure 20

Figure 21   Figure 22

After the 2016 campaign, the focus turned toward patriotism. The theme became *Echte Patrioten* (*True Patriots*) and the organisation concentrated on direct communication locally (*Hoamatlandtour 2017 – 2017 Homeland Round Trip*). But in the spring of 2018, it returned to the theme of "outsiders" with *Ein Land. Seine Jugend* (*One Country and Its Youth*). The opening melody is relatively fast paced and, with the voice of the video's narrator entering in the middle of the song, it plays an activating role. The music intertwines with the voices of actors playing roles in the short video and they turn out to be protesting asylum seekers. Although the melody is playing in the background, together with the protestors' voices it shapes the perception of a shared consciousness and how serious it is. FJOÖ Regional Chairman Michael Raml narrates the first part of the video (0:00 - 0:48) and enumerates the negative consequences coming from the influx of refugees and asylum seekers, simultaneously represented by visual elements in the incorporated video and the sequence of actors appearing in it (see Figures 23-25). The litany of complaints includes pressure to apply Islamic law in schools, the spread of drugs in youth clubs, public violence and protests; but there are also portrayals of idleness, comfortable lifestyles, construction of mosques and the associated establishment of Islam as a faith among the "foreigners" in the country (see Figures 26-28). Culturally different nationalities are pictured solely against the background of negative stories. The narrator openly expresses dissatisfaction with the country's current situation and takes this attitude as the spokesperson for all real and potentially dissatisfied local citizens.

[0:02 / Narrator: „Islamische Gesetze in den Schulen, Drogen in Jugendclubs, Messerattacke auf offener Straße?“
(Islamic law in schools, drugs in youth clubs, knifing in the street?)]

Figure 23

Figure 24
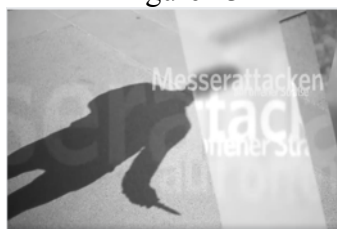
Figure 25

[0:10 / Narrator: „Wenn wir uns in diesem Land umsehen, wird uns oft unwohl. Eigentlich haben wir uns das Alles ganz anders vorgestellt. “
(Looking around the country, we often feel uncomfortable. We've actually imagined it all quite differently.)]

Figure 26
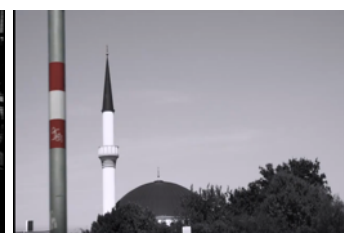
Figure 27

Figure 28

Subsequently, the narrator, the youth organisation's main representative, draws attention to the future of the homeland from his own perspective. The video characterises the polarisation of society into a division of us/our country/our youth against "them/outsiders". Patriotism steps into the forefront of the video, becoming the opposite pole of "foreigners", now refugees and asylum seekers. Patriotism's relationship to the country is shown in a bird's eye view of the landscape, followed immediately afterwards by the camera panning refugees, to leave the impression of them waiting to be expelled from the country (see Figures 29-31).

[0:25 / Narrator: „Wir fordern einen Stopp der Überfremdung und eine Umkehr der falschen Einwanderungspolitik.“ (We demand an end to foreign infiltration and the reversal of an immigration policy that is all wrong.)

Figure 29

0:31 / Narrator: „Wenn wir nicht Fremde im eigenen Land werden wollen." (Unless we want to become foreigners in our own country.)]

Figure 30   Figure 31

In its relationship to the nation, its members, culture and traditions, the dominant visual element of patriotism focuses on professions and traditional occupations (see Figure 32-34). But the polarisation of society is perceptible here, too, as a demand for traditional professions to be practised by skilled workers locally and not for their jobs to be done by immigrants from all over the world (see Figure 35). The choice of footage is worth remarking because local residents are captured in professional jobs looking serious and focused, while their immigrant counterparts are portrayed with smiles of their faces more reminiscent of mockery.

[0:34 / Narrator: „Wir wollen die Bauern als Ernährer und Grundpfeiler unserer Kultur erhalten und unterstützen."
(We want to keep and support our farmers as the providers and foundation of our culture.)

Figure 32

0:40 / Narrator: Wir wollen die handwerkliche Tradition unserer Heimat bewahren."
(We want to preserve our homeland's traditions of craftsmanship.)
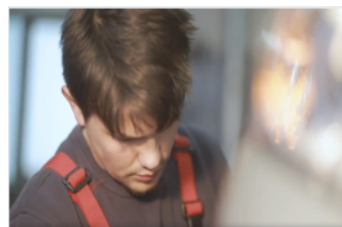

Figure 33   Figure 34

0:43 / Narrator: Unsere Jugendlichen sind unsere Fachkräfte – nicht Zuwanderer aus der ganzen Welt."
(Our professionals should come from our youth, not from immigrants from around the world.)]

Figure 35

The second half of the campaign video also addresses the issue of cultural diversity. Here the narrator more broadly underscores the feeling of pride in the environment of Europe, saying "*Natürlich sind wir auch stolze Europäer.*" (Naturally, we are also proud Europeans), "*Wir treten ein für ein Europa der Vaterländer.*" (We stand for a Europe of fatherlands) and "*Für ein Europa der regionalen Kulturen und der verschiedenen Völker*" (For a Europe of regional cultures and different peoples). Nonetheless, even here the implicit boundary between us "Europeans" and them "Non-Europeans" exists.

Conclusions

This paper discusses the audiovisual resources of the *Freiheitliche Jugend Oberösterreich* (FJOÖ), the Freedom Party's youth organisation in Upper Austria. Videos covering major campaign issues in the years they were produced are the centre of attention, representing opinions and the efforts expended by the organisation in that period of time. Cultural diversity and how the creators and producers of these videos approached it were noted and discussed. Even though audiovisual media combine several components and any of them could have been separately analysed, none received any particular concentration from us, but instead our effort was to look at the issue comprehensively, which ultimately proved beneficial. Based on our analysis, the following conclusions were reached:

• The youth organization's campaigns explicitly address cultural diversity and it was the key aspect in the three campaigns that were run during the summers of 2015, 2016 and 2018;

• Cultural diversity is the predominant theme planted in relation to refugees and asylum seekers. This is evident not just in some individual components, but the videos, particularly as an integrated unit, are strongly emotive with a negative tone because they concentrate solely on the negative impact of refugees and asylum seekers arriving in the destination country or travelling through transit countries. Everyone in the group without exemption is generalised in this way. This portrayal of the refugee crisis is characteristic of right-wing populist parties including the FPÖ and so the FJOÖ, functioning as a support organisation for the party, likewise approaches the issue negatively;

• Taking into account the theme of cultural diversity as the source of the video's negative impact, the main actors therein are perceived from the video producer's point of view as neither positive nor enriching, but rather they cause problems that need to be "decoupled", so to say. This attitude evident in the videos corresponds to the frequent polarisation of society generated by the attitude of "us versus them";

• Considering the individual elements of the analysed audiovisual media, the youth organisation creating the video uses a broad range of verbal cues that include slogans in a stable phraseological unit, rhyming slogans, one-word slogans and negatively connoted vocabulary, while the visual elements are similarly characterised by imaginativeness, sometimes even to the point of becoming provocative. Again it is possible here to detect the persuasive nature of both the verbal and non-verbal elements. Even the music used in the video campaigns analysed here are strategically selected, with the clear objective of influencing the opinions of whoever views them, whether from an older age group or somebody looking for their own political orientation.

Acknowledgements

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https://www.youtube.com/c/fpoetv

The national youth organisation's Facebook account (FJOÖ):
https://www.facebook.com/pg/FJOesterreich/ about/?ref=page_internal

The official website of the national youth organisation (FJOÖ):
http://www.rfj-ooe.at/

Figure 1 – 35 - from the official website of the national youth organisation (FJOÖ):
http://www.rfj-ooe.at/kampagnen/

"Wesensmerkmale des Populismus" by Karin Priester (2012):
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Composition of the Political Caricature in the Journal "Neue Freie Zeitung" as a Result of Difference-Thinking

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Abstract

Right-wing populists in Europe are employing sophisticated strategies to convince their voters of their cause and the political caricatures they produce can be seen as one of these strategies. This study seeks to analyse the cartoons appearing in Neue Freie Zeitung, a newspaper published by the Freedom Party of Austria (FPÖ), focusing both on their thematic spectrum and composition. Accordingly, one of the constitutive features of these caricatures is how they highlight the differences in opinion toward political opponents and between outside cultures and the party's own culture. There are also concrete examples of how the differences are specifically used journalistically and artistically to communicate the party's own political message.

Keywords: Political Caricature, Populism, Political Satire, Enemy Images, Neue Freie Zeitung

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Introduction

This paper analyses caricatures (cartoons) from *Spitze Feder* (The Sharp Pen), a regular column that appears in *Neue Freie Zeitung*. Because the newspaper is published by the Freedom Party of Austria (FPÖ), the political cartoons are not necessarily independent, but instead reflect how it interacts with the public. The newspaper's primary readers are members and potential supporters of the FPÖ, so a certain agreement in opinion and values between the cartoonist and readers about his ideas can be expected. Our objective is to approach some of the key topics, pointing out how populist caricatures are typically composed and what their specific are.

What are political cartoons?

The term "*caricature*" is etymologically derived from the Italian word *caricare*, which means, among other things, to exaggerate or stretch a point. It underscores an essential feature of political cartoons, how they exaggerate and excessively emphasise certain characteristics or characters to the point of travesty. Even though satirical depictions have existed since antiquity, they only gradually became established as a fine art genre in late medieval Europe and at the dawn of the Renaissance. As the Reformation progressed, a flood of caricaturist leaflets, pamphlets and mocking images appeared to let people think for themselves, among other things intended for the illiterate in the tradition of the *Biblia pauperum* (cf. Koschatzky, 1992, p. 17). After a boom in the drawing of cartoons and reaching enormous popularity in 18th century England, the first half of the 19th century saw the emergence of the first illustrated humour magazines, especially in France, joining caricature and political journalism together and spreading slowly to other European countries (Krekovičová & Panczová, 2013, p. 32).

When considering the meaning and function of caricatures, the comic aspect is necessarily the place to start. The mechanism of action can be best elucidated by the superiority theory of humour traced to Plato and Aristotle. They understood humour to be a response to the world around them, where laughter itself gives those laughing a sense of superiority over those laughed at (cf. Platon, 1861; Aristoteles, 1982, p. 17), as it makes the recipient of the laughter a wiser, more informed and morally better person. On the one hand, it leads to a feeling of satisfaction and yet, on the other, it creates a feeling of community with other like-minded people on the side of those laughing. Thomas Hobbes latched onto this concept, understanding laughter as an act of self-affirmation, while also stressing the importance of a "foreigner" because mistakes made by close friends and relatives do not encourage laughter (Hobbes, 2005, p. 16).

Austrian art historian Walter Koschatzky sees laughter not as the objective of caricature, but rather a possible visible outcome. Here he distinguishes between malicious and liberating laughter (Koschatzky, 1992, p. 18).

It can be said that caricature and political cartoons are essentially populist in nature - a genre trying to be understandable to a wider population and thus, unlike artistic drawing, it seeks to be more unambiguous and less abstract or "coded". It should be "understandable even without an in-depth study of the author's intention and able to pass to its audience a current, ridiculing perception of political, other social aspect or even just everyday life" (Valter, 2014, p. 85). Nonetheless, a certain summarisation and

abstraction cannot be denied and even Werner Krüger believes the formal, abstract aspect, approximating a cipher, to be a basic component; yet it remains down to earth and another, inseparable element is its realistic, journalistic nature (Krüger, 1969, pp. 10-11).

But the *Neue Freie Zeitung*, whose cartoons we studied, is not a humour magazine and its journalistic context is quite clear. Krüger even speaks in general about the literary, journalistic component found in political caricature and, following up upon Theodor Heuss's 1910 article *On the Aesthetics of Caricature*, he draws attention to the text usually accompanying the cartoon and emphasises literary stylistic elements therein such as satire, irony, persiflage, parody and travesty (Krüger, 1969, p. 12).

Therefore, political cartoons clearly bring together artistic, journalistic and opinion forming aspects. As understood from the inspirations of previous creators, they are a caricature of might in the broadest sense of the word, of constellations of power and the power to form opinions. In this spirit, it can pertain to politicians, political actors and to all people in the spotlight and the institutions involved in forming public opinion, as it defines and influences cultural and social values. The immediate aspects are criticality and topicality. Analysing caricatures becomes a challenge precisely because the diverse aspects and hybrid nature of this method of communication have to be taken into account alongside the need to judge it at least in the context of the fine arts, journalism, literature and political linguistics.

Topicality and substance in political cartoons

At first glance, defining political cartoons in terms of theme and content seems very simple. Illustrator Jan Valter saw them as a caricature "touching upon a political event or personality", while separating them from community caricatures and other types that employ humour, poetry, portraits, philosophy and propaganda. But he adds that the dividing lines between individual categories are in a state of flux, even as the transitions between these types are smooth (Valter, 2014, p. 87). On the other hand, this diffusion creates a barrier to any clear perception of political caricature and demarcates it from other types of caricatures. This study opines that political cartoons are frequently associated closely with a portrait or propagandistic caricature. Valter's own differentiation between political and social caricature, where political events are caricatured through their impact on society, also contradicts Werner Krüger's approach, directly linking political cartoons to criticism of society (Krüger, 1969, p. 17).

Walter Koschatzky differentiates the content in another way, identifying the 12 most common themes in political cartoons. They are the ideal and truth about humans, railing against inhumanity, railing against the power of rulers, revealing immorality, unmasking criticism, targeting politics and politicians, showcasing stupidity and selfishness in appearance and reality, comical accidents, small weaknesses and great nonsense, the absurd and grotesque, humour to make you think and pictorial stories like comic books (Koschatzky, 1992, p. 17). These classifications were made during the organisation in 1992 of an exhibition called *Karikatur und Satire: Fünf Jahrhunderte Zeitkritik* (*Caricature and Satire: five centuries of criticising the ages*), which was held in the *Kunsthalle der Hypostiftung* in Munich, Germany. Although political caricature is too held up as a separate type in this classification, it encountered the same problem as experienced earlier because several of the mentioned aspects of content had been

already manifestly or latently intertwined with the topic of politics, such as railing against the power of rulers, unmasking criticism and humour to make you think, notwithstanding others.

In political caricature, Friedrich Georg Jünger's 1936 essay *Über das Komische* (*About the Comical*) appears a suitable starting point. Here he wrote "Everything comic is based on conflict. Without it, nothing comic is conceivable, only if we are aware of it, we are able to perceive comicism. Therefore, something comical can never emerge from non-conflict situations and conditions" (Jünger, 2005, p. 104).

Conflicts are inherent in the repertoires of populists, as Paul Diehl notes, talking about instruments that dramatise and exacerbate conflicts and the compatibility of such motivated self-promotion with the media (Diehl, 2012, p. 20). The potential for conflict in the rhetoric of both populism and right-wing populism stems primarily from constructing the image of an enemy and a general negativism in their logic, something numerous studies have noticed (Priester, 2017; Schellenberg, 2017; Decker & Lewandowsky, 2017). Enemies and what they call "others" are defined and shunned because of exaggerated ethnic, religious, cultural, sexual and political criteria (Schellenberg, 2017, p. 15) and the nature of the caricature reflect it. Similar determinants were stated by Bratislava political scientist Radoslav Štefančík (2020) in his analysis of the communication strategies right-wing extremists use. He lists eight categories to describe the image of the enemy, several of which expand or clarify the options for classifying them that his German counterpart Britta Schellenberg (2017) had earlier outlined. These include the media, international organisations and institutions, which both extremists and right-wing populists criticise strongly.

The next section examines the lines of conflict that have been drawn and the variable renderings of how the enemy looks.

Analysis of composition and specifics

The enemies appearing in the cartoons below are the opposition political parties seen as direct political competitors (Figure 1); the media, particularly state television exemplified by ORF 2 (Figure 2); government institutions such as prosecutors (Figure 3); migrants (Figure 4) and international institutions like the European Union (Figure 5). Some of these examples have moreover accumulated different enemies. Examples include Figure 3, which makes fun of biased judges and uses catchy text to present symbolically the competing Austrian People's Party (ÖVP) as the judge's "black font"[1] and Figure 4's concern not just about the influx of migrants, but also its criticism of the solution provided by the Socialist Party of Austria (SPÖ).

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[1] In Austria and Germany, the philosophies of political parties are represented by different colours. The Christian democratic parties are "black" to reflect their clerical background; the socialist parties "red", the environmental parties "green" and at one time the pro-business liberal parties "blue". However, the liberal Free Democratic Party in Germany had over the years shifted to yellow and the Alternative for Germany took over blue, following the lead of the FPÖ, which as a one-time liberal party had always used it. Previously, the extreme right-wing parties in Germany used brown as their colour.

Fig. 1: NFZ No 8/2019.

Fig. 2: NFZ No. 18/2019.

Fig. 3: NFZ No 34/2019.

Fig. 4: NFZ No 38/2018.

Fig. 5: NFZ No 47/2018.

Fig. 6: NFZ No 6/2018.

In some cases, the enemy is more abstract than what is documented in Figure 6. Here the FPÖ is stylised as a victim of persecution and bullying. The constellation of friend versus enemy becomes a narrative of aggressor and victim. There are several clues in this caricature indicating this motive. The number 88 the mouse is photographing with a lot of interest and the allusion to the colour brown both point toward suspicions of right-wing extremism and fascism. An understanding of these well-known ciphers is further facilitated by the question of whether another Nazi has been found (*Wieder einen Nazi gefunden?*). Both the use of relatively simple ciphers and direct, non-cryptic formulations let ordinary readers easily understand the cartoon and this is essentially its intention. It is equally clear from another chosen stylisation, which is underscored by the victim of the inscription "Kill HC!" written as graffiti on the wall. In this case, the letters are the initials of former Vice Chancellor and FPÖ head Heinz-Christian Strache. The issue of intolerance both critiques political opponents, who do not necessarily show any love for the FPÖ, and others advocating the acceptance of foreigners (see also the graffiti "*Ausländer rein!* – "Foreigners, come in!") to remind those coming to Austria from elsewhere of the ongoing suspicions and accusations against them. The final cipher in the cartoon is the extraterrestrial contemplating the words of the Austrian national anthem and it has perhaps the most hidden meaning of

all. It refers to the scandal that has erupted over supposedly anti-Semitic lyrics found in the anthem that cynically sympathise with the Holocaust. While the ruling party's official rhetoric sought at the time not to apply its previously frequently used narrative of victimisation, the political cartoon could afford to be stylised as such because it is considered an artistic genre.

The cartoons do not necessarily depict someone from the local political scene. Figure 5 caricatures German Chancellor Angela Merkel and she likewise appears in Figures 7, 8 and 9. Other examples include former Social Democratic Party of Germany (SPD) leader Martin Schulz (Figure 7), Turkish President Recep Tayyip Erdogan and EU Commissioner Jean-Claude Juncker (Figure 10). However, it is more than just a style of politics incompatible with the FPÖ that anoints them as "enemies". Their relationships with international institutions, as well as other cultural or value differences, are alleged to be threat to Austrian national sovereignty.

Fig. 7: NFZ No 1/2017.　　　　　Fig. 8: NFZ No 23/2018.

Fig. 9: NFZ 49/2018.　　　　　Fig. 10: NFZ 24/2018.

Any explicit unfolding of an "enemy" position in religious or gender related issues are rather rare among the cartoons studied here. The religious aspect and especially attacks on Islam are more typically visible in the text (see the linguistic analysis of the *Neue Freie Zeitung* by Fraštíková, 2019). Although Figure 4's theme is explicitly Islam, more often the illusions are subtle and coded, which is also evident in the examples so far presented. In Figure 10, Erdogan ironically alludes to the Crusades, while Figures 7 and 9 in turn banter flippantly about Biblical themes, the former retelling the story of the Star of Bethlehem and the latter of Jesus washing the feet of the disciples. In the context of gender and sexuality, the emphasis is on masculine traits in women (hairy legs in Figure 8) and the slightly less common feminisation of men. However, the gender and religious aspects of the cartoons examined here were not mainly intended to highlight

conflicts, but rather they more accompany the main issue and are an additional element. The cultural aspect appears to be much stronger (see Figure 11's exploiting of cultural cross-dressing), which may also include an understanding of gender or religion. Should an explicitly cultural aspect come to the forefront, however, the cartoon can then cease to be political. The example of Figure 12 could be discussed as a caricature of society (according to Valter, 2014). However, the response to the COVID-19 crisis is inseparable from politics (Figure 12) and the fear of going outside may also reflect the power of the state to restrict freedom of movement.

Fig. 11: NFZ 45/2018.   Fig. 12: NFZ 15/2020.

While religion and gender are not necessarily important themselves as themes, they are nonetheless natural elements in the cartoons and function to exaggerate and ridicule, thereby creating something comical. Disregarding the political content in the cartoons and returning to the content and thematic definition of caricature Koschatzky earlier mentioned, the mechanisms woven into these cartoons can also be identified.

Even in a political context, a cartoon can illustrate immorality (the corrupt behaviour shown in Figure 13) or make fun of human nature (Figure 14 – minds changing).

Fig. 13: NFZ No. 10/2018.   Fig. 14: NFZ No. 7/2019.

References to the incompetence of political opponents, whether real of fictional, is equally common (Figures 15 and 16), yet there are also cartoons that stylise an enemy as a saviour acting to make a mockery of human follies (Figures 17 and 18).
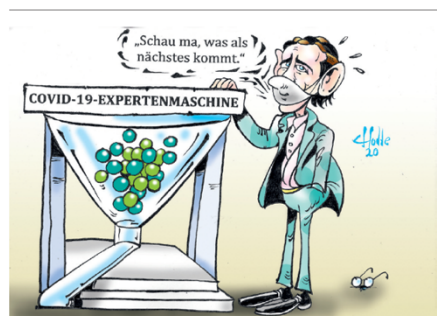
Fig. 15: NFZ No 19/2020.
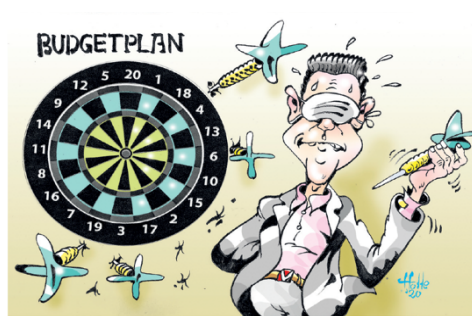
Fig. 16: NFZ No 22/2020.

Fig. 17: NFZ No. 48/2019.
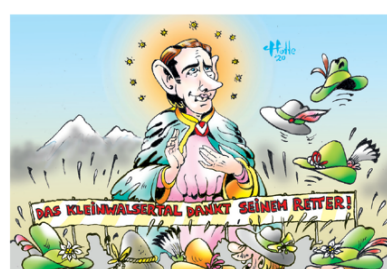
Fig. 18: NFZ No. 21/2020.

The remaining two examples are interesting from a different perspective. They underscore how populist caricature can also become an instrument for publicising the aspects and elements that are the typical features of populism (the images of the charismatic leader and Messianic character), while exploiting them to mock a political opponent. Figure 18 again documents, among other things, the persiflage of religious motives, as it accumulates several ciphers and have them simultaneously interact with each other.

Besides the political and critical aspects, along with the sense of political order the cartoons analysed here create, no-one can certainly deny the artistic qualities of the genre. The stylistic elements earlier mentioned, such as the use of ciphers, abstract art, condensation (*Verdichtung*) and persiflage, highlight how political caricature is not only able to communicate political content, but also works at the meta-level of literary and artistic communication, like in the example provided in Figure 19, which underlines the principle of intertextuality and cites a well-known story created by German writer Wilhelm Busch.

SPITZE FEDER Der Oberlehrer in der Rolle seines Lebens.

Fig. 19: NFZ No 20/2020.

Conclusion

It is possible to talk about targeted political marketing, political advertising or election campaigns in connection with the cartoons analysed in this paper. It is their association with the political party they endorse that makes them different from ordinary political satire or caricature. Yet they show all the typical features and elements of this artistic genre. Their constitutive element is most of all the imagining of diverse enemies that can be classified and differentiated in various ways. The mechanism of how populist caricatures function implies the humiliating of opponents and their features, opinions, values and political convictions. An important element is also the situational aspect that results from a spontaneous reaction to the current socio-political situation, and especially the various missteps of other politicians. In many respects, however, the situations and conflicts are either incredibly exaggerated or purposefully constructed. In communication terms, the cartoons attempt to use transparent, comprehensible codes and only a limited amount of abstraction to let readers understand clearly what they are trying to say. Humour and comedy are employed for the political party producing them to reach out more closely to its supporters and to give them a sense of belonging, power and both intellectual and moral superiority over a common enemy. The image of an enemy is based on differences of opinion and culture, which turns the cartoons into an instrument for fulfilling the party's political objective and leads to the enemy becoming discredited.

Acknowledgements

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Philippine Basketball, Economy and Politics:
How the COVID-19 Pandemic Hit the Filipinos' Most Beloved Sport

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Abstract

This paper explores how the prolonged quarantine measures in the Philippines affected the economics and politics of basketball, arguably the most beloved sport among Filipinos, given its sub-cultural underpinnings and significance as a venue of public interaction. It presents the sport and its foremost structure (basketball court) as an "economic hub" in limbo because of strict lockdown measures implemented by government under the Enhanced Community Quarantine (ECQ) to ensure the public's safety amid the rise of COVID-19 cases in the Philippines, specifically from April to July. This led to limited people movement, and consequently empty playing courts devoid of any economic activity. The void left by the "economic hub" discourse is now greatly filled by the politics of "public utility" hinged on the utilization of basketball courts as quarantine sites and holding areas for lockdown violators, among others. But in late September, the country's basketball stakeholders have moved to restart the sport by staging a bubble tournament in Pampanga province, north of Manila, and later joining the second window of the 2021 FIBA Asia Cup qualifiers in Manama, Bahrain as its pitch for a return to "basketball normalcy" in the country. The descriptive-analytical method of narration supported by historical sources and online news updates were employed for this paper to contextualize the discussion and show how Philippine basketball as a subaltern topic can transcend the realm of the "apolitical" and become an outpost of relevant scholarship at the time of the pandemic.

Keywords: Philippine Basketball, COVID-19, Quarantine Ligang Barangay, Economy, Politics

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Introduction

It's a windmill of passion that never stops. At least allegorically, it shouldn't. But in mid-March, basketball in the region's undisputed hoops capital came to a grinding halt. Filipinos breathing the sport ran out of air, at least metaphorically.

Games and practices were abruptly called off after President Rodrigo Duterte placed Metro Manila, and later the entire Luzon island under Enhanced Community Quarantine (ECQ) to stem the impending onslaught of COVID-19 in the Philippines. The lockdown hobbled the economy, and with it, a slice of Philippine life as reflected in the sport of basketball.

Figure 1. A poster card of a 2015 documentary explaining the Philippines' mad love for basketball at the height of the country's bid to host the 2019 FIBA World Cup. (Graphics courtesy of News 5)

Like football in other parts of the world, it is a "religion" with a massive Philippine following steeped in ritual and tradition. As a testament to that, the Philippines was named Most Valuable Fans (MVF) Best Country in the 2014 FIBA World Cup in Spain with its iconic "*Puso!*" (Heart!) battle cry. During the awards rites in Madrid, FIBA played a video of Gilas (national team) fans cheering their hearts out as the Philippines officially became the darling of the tournament despite finishing tied for last place in its group (Castillo, 2014). But Philippine basketball is not just food for the heart and soul. Over the years, the game produced a complex market economy that has literally put food on the table for many Filipinos who have since treated the sport as their personal bread-and-butter. Yet as many others today, their lives suffered an economic meltdown worse than a bad shooting night as the global pandemic shut down basketball courts around the country.

For starters, the Philippines' basketball economy is a product of the unique sporting ethos the Filipinos have developed since the first playing court was erected in Intramuros, Manila during the American colonial period. Within the scope of state-building, athletic fields can become key instruments in fostering a shared interest

among people from different backgrounds, serving as a mode of collective self-expression and standing as symbols of a common identity (Antolihao, 2015, 66). The sport was part of the assimilationist blueprint of the US insular government in the Philippines. Soon after, it forged a nationalist bond with the people as Filipinos made waves in the pre-war Far Eastern Games and the Olympics.

Figure 2. Basketball courts can be found almost anywhere in the Philippines. This wooden court with children randomly playing is a common sight in the Philippine countryside. (Photo courtesy of philstar.com)

Historically, the Philippines is a basketball powerhouse in Asia, alongside the region's traditional heavyweights like Japan, China, and South Korea. In the Far Eastern Games which was the precursor of the modern-day Asian Games, the Philippines won 9 of 10 golds in basketball. In the Asian Games itself, it was the first country to win four straight basketball golds, aside from winning the Asian championship five times. In the 1936 Berlin Olympics, where basketball made its debut as an official Olympic sport, the Filipinos placed fifth, the highest finish by an Asian team in Olympics basketball to this day. But the Filipinos' greatest feat came in the 1954 World Basketball Championship (now FIBA World Cup) where it won the bronze, the only Asian team to pull off a podium finish in FIBA history. These accolades were never lost in the Filipinos' social consciousness. In fact some Filipino expressions were derived from basketball like "bilog ang bola" (even underdogs can win), "timeout muna" (to take it slow or with caution), "rebound" (new relationship after a breakup), "foul 'yun" (offending someone), "sure ball" (it is certain), and "benta" (to deliberately lose/ sell the outcome). Conversely, some Filipino words were used as Philippine basketball terms. For example, the word "asawahin" (to marry) is employed to connote hard-nosed man-to-man defense. Other terms are: "payungan" (to shade someone with an umbrella) which means to defend someone with arms raised, "postehan" (to watch over), which translates to posting up a defender near the basket, "binubuhat" (to carry), which connotes singlehandedly leading the team, "buwaya" (crocodile), which implies a selfish player or ball hog, "bangko" (bench) which pertains to a seldom-used player or benchwarmer, and "luto"

(to cook) which alludes to biased officiating. All these are common lore and language in every community basketball court around the Philippine archipelago, especially during the months of the highly anticipated *ligang barangay* (village league).

Figure 3. The barangay liga (village league) is a traditional crowd drawer in local communities, especially during the summer period. It's a tournament where almost every member of the community can participate, regardless of age and social status. In this photo, national police chief Debold Sinas [center] made the ceremonial toss to start the game. (Photo courtesy of sunstar.com)

Economic hub

Previously, Filipino basketball followers only intermittently come together as a collective body, typically when they supported the national team during international competitions. In the absence of these major sporting events, Filipino basketball followers generally retreated back to their own communities to follow the local or municipal leagues (Antolihao, 2015, 115). Before the pandemic, the *ligang barangay* (village league) was part of it as a cyclic activity that underscored the Filipinos' deep sense of community during the peak months (April, May, June) of the vacation season. Everyone is practically included in this annual local spectacle. Neighborhood lads as young as 10 to fathers and uncles in their 50s compose at least a team of eight to join the *liga*, pitting their basketball skills against folks across the street or some far-flung corner of the *barangay* (village). The *ligang barangay* continues to serve as the backbone of Philippine basketball where some of the country's top hoop prospects began to learn the sport. Arguably, it's also a microcosm of the Philippine Basketball Association (PBA), Asia's first professional basketball league. Its most popular ballclub – Ginebra – even carries the village (barangay) moniker as the unrivalled team of the masses bearing the iconic San Miguel tonic brand. The team calls its legion of fans as *kabarangay* (fellow villagers).

Figure 4. Street food is popular among patrons of the barangay liga [village league]. Make-shift stalls are usually installed just beside the community court where the barangay liga is held. (Photo courtesy of pinterest.com)

Figure 5. Pick-up games and shoot-outs are common among street folks who literally earn a living playing basketball. But the pandemic has kept them away from the court for months now. (Photo courtesy of Daniel James Sajol Bersano/ News5)

The basketball court transforms into a virtual tourist attraction once the *ligang barangay* (village league) tips off in late March or early April. From its sidelines, street peddlers converge to convene one of Philippine sports' enduring informal economies. Snacks – from street food staples like fried banana, camote (sweet potato),

kakanin (native rice cakes), barbecue, *isaw* (intestine skewers), fish and squid balls to packed cupcakes, bottled soda, and other home-made delicacies and refreshments – are sold just a few steps away from the playing venue, conveniently catering to everyone in the vicinity. The nearby *sari-sari* (variety) store usually doubles its sales during games, with cigarettes among the most procured items despite nicotine's supposed mismatch to a lung-busting sport like basketball. The *barangay* women would often staff these make-shift snack bars and stores while hoarsely cheering for their husbands, fathers, sons, brothers, and other relatives play, or sit idly on the bench. It's a loose reunion and a family feud at the same time.

Figure 6. This is a sample of the card used for "ending." The name of the bettor is listed beside the two-digit combination he/she choses. The tringular figure is shaded if the bettor has already paid the wager. (Photo courtesy of Shopee.ph)

All that however was nowhere in sight this year. For months, COVID-19 shut down basketball's factory of hope, especially for the country's marginalized who have since looked forward to spending the vacation season playing, bonding, learning – and earning – through community-organized leagues or *ligang barangay* (village league). The *liga* as a public gathering that binds Filipino industry and idiosyncrasy like the annual *piyesta* (village feast) was discarded after strict community quarantine measures were implemented in mid-March. Busy Metro Manila alleys, usually converted to playing courts in the afternoon or evening, were barricaded. Street-ballers were also barred from playing outdoors. Professional and semi-professional leagues also reeled from the same experience. With no games to play, broadcast operations ceased. Venues were closed. Contracts were discontinued. This inevitably displaced TV crews, ushers, security personnel, and ordinary snack vendors who earn a daily take-home pay of P537 (10.74) or even less.

Philippine basketball's other working individuals like the beloved neighborhood tailor who used to earn P5,000 to P15,000 ($100 to $300) from completing a 12-piece set of basketball uniforms for every *liga* team, had to set aside his jersey-making business to produce the more in-demand cloth masks for P30 ($0.60) a piece. Even the sport's much maligned official – the referee – is frowning the absence of the *liga*. Simply put: No *liga*. No games. No income. A referee can earn at least P2,000 to P5,000 ($40 to $100) for officiating a *barangay liga*. Meanwhile, professional referees in the PBA receive a basic monthly salary of P20,000 to P40,000 ($400 to $800) depending on which class they belong to (Badua, 2015). But now, no one's whistling, even if COVID-19 has committed the most brazen flagrant foul to their families' day-to-day survival.

Figure 7. Jersey shops were forced to look into other means like face mask production with cheaper returns after the lockdown effectively suspended all community basketball leagues in the country during the summer.   (Photo courtesy of dreamstime.com)

Outside the organized *liga* is the customary *pustahan* (betting game) where locals earn money from wagers as low as P10 ($0.20) to as high as P5,000 ($100) as part of basketball's underground economy. The stakes can double, or even triple with more games played. All things being constant, the amount won from these money games is enough to buy rice, coffee, canned goods and other necessities to keep the family afloat at least for a couple of days. Others milk the sport by turning into bookies of "ending," a community-based numbers game where partakers bet on the last two digits of a basketball game's final score. The bettor who chooses the right ending-number combination wins the collected pot money from wagers as low as P5 ($0.10) to as high as P10,000 ($100). Live PBA, and sometimes NBA, games are the bases of these winning last-digit numbers. But the quarantine period has kept these basketball lifers off the court and away from their unconventional source of living.

Public utility

The local Sangguniang Kabataan (Youth Council), in conjunction with the Sangguniang Barangay (Village Council), organizes the *liga* as annual age-group tournaments. A separate format for girls and members of the LGBTQIA+ and PWDs

can also be arranged depending on the availability of participants. But no one organized any of that, at least last summer. The village council was busy front-lining the streets to ensure that lockdown protocols are followed, and that the community transmission of the virus is contained. In a more euphemistic sense, this is a new ball game, officiated by the national government, with every Filipino – now huddled in their homes – expected to play their best to defeat an unseen opponent. Who's the coach? The village chief or the local mayor, perhaps. For one, they know the basketball and its nuances, especially as a potent political weapon during and after elections. They woo the community by building basketball courts "uniformly located in central plazas, alongside the other touchstones of Philippine society – city halls, public markets, and Catholic churches." Politicians who regularly employ this "go-to tactic" believe in the overarching value of these structures to the lives of their constituents. Throughout the Philippines, in coastal fishing villages, courts were used in every conceivable way. At midday, when it was so hot that trying to play five-on-five would have people keeling over from heatstroke, farmers dried rice on the courts. This arrangement benefited drivers on provincial roads, who otherwise would have to dodge patches of grain scattered in the street. Parties for holidays, graduations, weddings, and debuts for girls on their eighteenth birthdays were all held on basketball courts (Bartholomew, 2010, 178-179).

Figures 8 and 9.. Lockdowns to address the pandemic had greatly affected local basketball life. These playing courts in Tondo, Manila [top] and Quezon City [bottom] remained empty since strict quarantine measure were implemented last March. (Photos courtesy of Kennett Roger Garcia and Juno Buena)

In the pandemic age, some of these basketball structures took an equally vital role, turning into massive quarantine sites for suspected COVID-19 patients and returning Filipino workers abroad. One of them is the Philippine Arena in Bulacan, the biggest indoor basketball venue in the country which is set to host the 2023 FIBA World Cup. The Iglesia Ni Cristo-owned indoor arena can accommodate 300 patients with mild symptoms, and house 300 health workers, but Bases Conversion and Development Authority (BCDA) President and CEO Vince Dizon said the facility "can later be expanded to cater to up to 2,000 patients." (Esguerra, 2020). It also opened a mega swabbing facility with 96 testing booths which can do 1,500 swabs a day.
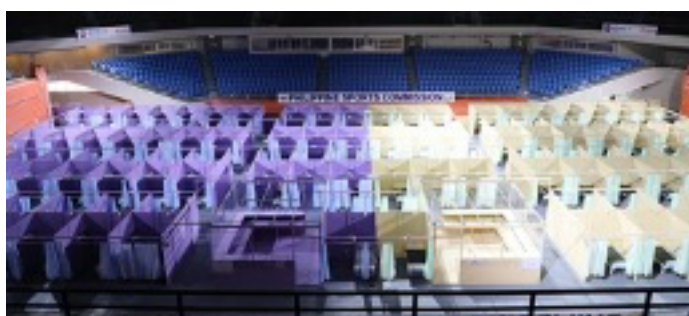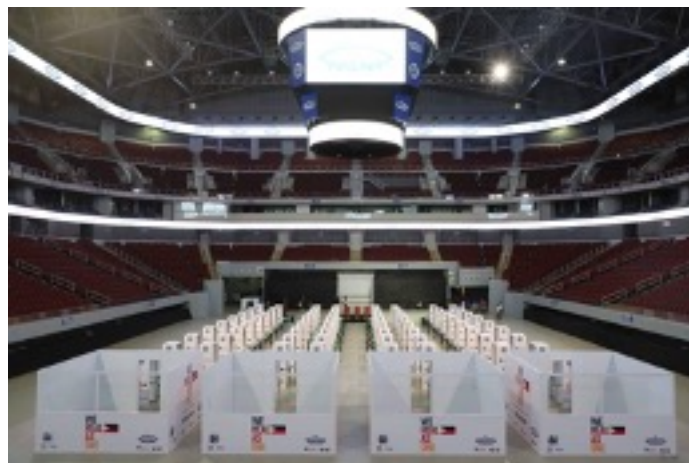
Figures 10, 11 and 12. Some of the country's premier basketball venues like the Mall of Asia Arena (top), Ninoy Aquino Stadium (middle) and Rizal Memorial Stadium (bottom) were converted into quarantine and swabbing facilities to accommodate and test suspected COVID-19 cases. (Photos courtesy of Bases Conversion and Development Authority)

Another mega swabbing facility was built at the Mall of Asia Arena, where PBA and collegiate basketball games are regularly played. The 15,000-seater venue also hosted several FIBA tournaments like the 2013 Asian Championships and the 2015 Olympic Qualifiers. Now it is holding 72 testing boots which can finish up to 1,500 swabs a day. The 86-year-old Rizal Memorial Stadium, site of many historic basketball battles was also converted into a quarantine facility with 100 beds and manned by medical personnel from the military. The adjacent Ninoy Aquino Stadium also became an "instant hospital" with a 120-bed capacity, air-conditioned cubicles, plug-in outlets, free internet connection and round-the-clock monitoring. Meanwhile, the PhilSports Arena (formerly Ultra) which hosted PBA games and the 2011 FIBA Asia Champions Cup can accommodate 132 mild and asymptomatic cases as a quarantine facility under the Philippine National Police Health Service. The establishment of instant hospitals in Metro Manila and other parts of the country is a joint effort by the national government and the private sector to reduce the community spread of COVID-19, decongest hospitals in Metro Manila and ensure protection of both patients and frontliners from the disease (BCDA, 2020).

Figures 13 and 14. Community basketball courts were turned into holding areas for residents who were caught violating quarantine rules [top]. Some of the violators were ordered by the police to make push ups as a form of punishment [bottom].
(Photos courtesy of News5)

The village court is an equally valuable asset to the COVID-19 campaign as a haggling spot for mobile *palengke* (market), testing sites, as well as holding facility for locally stranded individuals (LSI) and quarantine violators, who were caught breaking curfew and stay-at-home regulations. Most LSIs who work in Metro Manila were barred from returning to their homes in the provinces after the lockdown was implemented (Punsalang, 2020). Some of them spent almost a day on the village court

exercising and listening to COVID-19 lecture videos as forms of punishment. Others were eventually transferred to jail facilities. From March 17 to May 31, police arrested and charged a total of 57,177 Filipinos for quarantine violations. Their records show 14,712 underwent inquest, while the rest were charged under regular procedures. Inquest means the person was arrested without a warrant. All in all, the police have apprehended a total of 188,348 Filipinos for violating quarantine. Of that number, 107,794 were warned and 23,377 were fined (Buan, 2020). Indeed, the space generated by these courts – both grand and humble – precede their utility as an extension of the Filipinos' complex political, economic, and social conditions in the pandemic age.

Ideally, sports should be apolitical. But in the Philippines, basketball is politics by other means. The venues turned into quarantine and holding areas are either government-owned or sponsored. Meanwhile, the owners of the other private structures used as COVID-19 facilities both wield immense political and economic clout. The religious group Iglesia Ni Cristo, which owns the Philippine Arena, is known for its bloc voting during elections. The Mall of Asia Arena owned by the Sy family belongs to the upper half of the country's wealthiest, according to Forbes. Some politicians have deep ties to the Samahang Basketbol ng Pilipinas (SBP) the country's basketball governing body, like Senator Bong Go, who was named government representative to the FIBA 2019 World Cup. Others like Senator Sonny Angara and Congressman Robbie Puno are key officials of the SBP, formed and sponsored by businessman Manny V. Pangilinan, who regularly engages government to obtain major deals in the country's utilities, infrastructure, and telecommunications sectors.

Depersonalized?

Playing basketball outdoors is still prohibited under General Community Quarantine (GCQ) guidelines set by the Philippine government's Inter-Agency Task Force (IATF) for the Management of Infectious Diseases. It has so far allowed non-contact sports like running, biking, golf, swimming, tennis, badminton, equestrian, range shooting, and skateboarding, among others to resume under GCQ "provided that the minimum public health standards such as the wearing of masks and maintenance of physical distancing protocols and no sharing of equipment when applicable are observed" (IATF, 2020).

Live sports such as basketball will only be allowed to return under a Modified General Community Quarantine (MGCQ) set-up. But in early July, the IATF approved the PBA's request to resume controlled practices. Per the PBA's proposal, only four players, a medical officer and a trainer will be allowed on the court for workouts behind closed doors (Villanueva, 2020b). The PBA has also adopted the FIBA "Return to Basketball" guidelines approved by the World Health Organization which prohibits "handshakes and high-fives between teams, referees, and table officials, as well as "unnecessary" fan engagement and "physical contact with an opposition team, referees or match official," while maintaining social distancing on the bench (FIBA, 2020).

PBA teams were likewise baffled by this minimum contact conundrum. While most of the ballclubs have tested negative for the virus, conducting the games while

observing health protocols has been a subject of debate. Initially, the league supported a "no play, no pay" policy (Morales, 2020), which will not force players with health security concerns to suit up for their teams. Players and personnel feared they may contract the virus while in transit or in the game venue and eventually infect their families back home. A team official has proposed a "bubble format" similar to the NBA's return set-up to prevent teams from bringing home the virus. Under the team quarantine (format), members will be housed together for 14 days, and only those who will not show COVID-19 symptoms will be allowed to participate in the tournament. Individuals are only allowed to go home once their mother teams have been eliminated. PBA and media personnel involved in operations will be quarantined as well (Villanueva, 2020a). But PBA Commissioner Willie Marcial shelved the proposal, citing logistical issues.

In sum, the no-contact rules are expected to depersonalize the sport defined by its physicality on one hand and geniality on the other, at least for a while. But basketball is also about empathy. During the lockdown, PBA teams and players chipped in from their own pockets to help front liners and fellow basketball workers hit by the quarantine period's jobless spell. One of them is the enigmatic Calvin Abueva, who was suspended indefinitely after figuring in a fight with an American import last year. Several well-meaning politicians who are patrons of the sport have likewise channeled personal funds to buy medical and food supplies for the people. Among them is Senator Manny Pacquiao, the world boxing legend, who once figured in the PBA as a playing coach.

The pandemic pause also spawned a battle of perception between the PBA and some team officials. The league recently took national team program director Tab Baldwin to task for criticizing its one-import rule and "tactical immaturity" of coaches in the country's *pambansang liga* (national league). Comparing the Philippines to its neighboring countries, it's the only league which observes this setup. Chinese Basketball Association (CBA) teams can sign up two foreign players and another Asian reinforcement for its season. Two imports are allowed in the Korean Basketball League (KBL) and in Taiwan's Super Basketball League (SBL). Meanwhile, the Japanese B.League allows at least three foreign players, excluding a naturalized Japanese player who is considered as a local. Even in the regional ASEAN Basketball League (ABL), teams are allowed to sign up at least three reinforcements per team (Leongson, 2020).

League officials slapped the American mentor a hefty P75,000 ($1,500) fine and a three-game suspension (upon the PBA's resumption) for his "uncalled for" and untimely comments against the league that is trying to regain its bearing after incurring P30 million ($600,000) a day in losses due to the lockdown. Baldwin was eventually fired as assistant coach of the TNT Katropa, one of the storied franchises in the PBA, owned by telco magnate and national team godfather Manny V. Pangilinan, whose companies continue to pour financial support to the COVID-19 cause. No doubt, the pandemic and its economic and political repercussions have pushed Filipino basketball fans in a state of reflection, as they ponder the future of the sport which yearns its return to the streets, to the broadcast channels, and to the Filipinos' collective consciousness as a people.

Figure 15. An image of a game inside the PBA bubble in Clark, Pampaga. The PBA bubble was deemed the first step to reclaim normalcy in the country's basketball situation amid the ongoing pandemic. (Photos courtesy of Manila Bulletin)

Conclusion

On September 24, the yearning that seemed impossible to heed at first, given the country's public health dilemma, was heard loud and clear. No less than the IATF approved the PBA's proposal for a "bubble" tournament similar to the NBA. The PBA "bubble" which was initially turned down by the league's top officials, became the first step towards normalizing the basketball situation in the country. All 12 teams committed to this momentous step for Asia's first professional basketball league. Prior to its approval, players held a dialogue with PBA Commissioner Willie Marcial to express their support for the bubble concept instead of the other proposed closed-circuit playing model. Marcial explained the semi-bubble is the hotel-to-venue-to-hotel setup, while the closed-circuit concept is when the players, coaches, and other team staff travel strictly from their homes to the venue and vice versa. The latter "bubble" setup is adopted now by the PBA when team practices resumed (CNN Philippines, 2020). The PBA bubble was situated in Clark, Pampanga under the auspices of the Based Conversion and Development Authority (BCDA) and the Department of Health. Teams in the PBA bubble had to play almost every day to meet the two-month schedule for the Philippine Cup which began on October 13.

Figure 16. Calvin Abueva's return to the PBA from an indefinite suspension was welcome news to many Filipino basketball fans. During his suspension, Abueva spent most of his time helping frontliners and others affected by the months-long lockdown due to the pandemic. (Photo courtesy of CNN Philippines)

In between games, government and league officials had to contend with suspected COVID-19 cases involving some players and team officials. Consequently, some of the games were cancelled while the suspected cases were quarantined and subjected to confirmatory tests to prevent the bubble from bursting following possible breaches on health safety protocols. The league withstood these challenges and with plenty to spare. Calvin Abueva was the bubble's greatest side-story. The erstwhile quarrelsome guard, who spent the early months of the lockdown helping frontliners to atone for his on-court misdeeds, was finally allowed to play after being suspended indefinitely by the league on June 4, 2019. A calm and collected Abueva, known in Philippine basketball as "The Beast" for his highly physical and energetic play, led his team Phoenix to the semifinals of the Philippine Cup. The livestreaming of the PBA bubble games drew record numbers by as much as 278,000 in one playdate, proving the Filipinos' love and support to their premier local league in lieu of physical attendance to the playing venues since the community quarantine was imposed. The PBA bubble also served a fitting end to its legions of fans as crowd darling Barangay Ginebra won this year's Philippine Cup. PBA Commissioner Willie Marcial described the bubble's last day as an early Christmas gift to him and to the league, noting all the league's sacrifices are for the fans. He also deemed the bubble as a source of inspiration to help Filipinos bounce back from the economic setbacks brought about by the ongoing pandemic.

Figure 17. The Barangay Ginebra Kings celebrate after winning the Philippine Cup in the PBA bubble. Ginebra, the most popular basketball team in the Philippines, is the first PBA team to win a title in a bubble set-up. The team dedicated its victory to the Filipino people and pledged to support the country's efforts against the COVID-19 pandemic. (Photo courtesy of Philippine News Agency)

The country's move to mount a semblance of basketball normalcy also took off with participation in the second window of the 2021 FIBA Asia Cup qualifiers in Manama, Bahrain, despite initial opposition, citing the possibility of exposing players to the virus while traveling abroad. The national basketball team composed of college standouts spent two weeks in a bubble-type training facility to quarantine and prepare for the qualifiers, where they eventually swept Thailand to remain unbeaten in their group. Some games in the third window of the qualifiers will be played in the Philippines using the PBA bubble set-up in Clark, Pampanga.

Figure 18. Gilas Pilipinas, bannered by college standouts, swept all its games in the Bahrain bubble of the FIBA Asia Cup 2021 qualifiers. The national team's participation was part of initiatives to slowly restore basketball normalcy in the country amid the pandemic. (Photo courtesy of CNN Philippines)

On the surface, these bold initiatives have reignited the Filipinos' basketball interest after months of staying away from empty playing courts, now utilized as make-shift

quarantine venues or sites for punishing quarantine violators. The informal basketball economy stays in the backseat as state regulations take the fore in optimizing the political utility of public spaces such as playing courts to beef up the government's infrastructure response against the pandemic. This is the new normal that Philippine basketball's stakeholders and followers will endure, but hopefully not for long. There is no doubt, the Philippines' basketball economy, now hinged on political utility as a means to attain normalcy under pandemic-time conditions, will soon emerge from the dugout. Patience and resilience are valuable basketball traits in the Philippines, perhaps a reflection of the Filipino psyche in general. Yet romanticizing them is like overdoing a timeout. The ball, however, is still in our court.

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Emperor Kangxi's Poetry on Taiwan

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Abstract

A total of four poems plus a poetic preface collected in *The Complete Works of Emperor Kangxi* (康熙帝御制文集) that deal directly with the emperor's military success of acquiring Taiwan are analyzed and translated into English. They include "Heard the News of Victory on the Day of Mid-Autumn Festival [中秋日聞海上捷音]," "Composed Another Five-Character Quatrain on the Same Night Facing the Moon [是夜對月再成絕句]," "A Poem Given to Shi Lang, with a Preface [賜施琅詩并序]," and "A Narrative about the Conquest of Taiwan in the Sacrificial Ceremony at the Tomb of Emperor Shunzhi [臺灣平告祀孝陵有述]. The translation would base on the conventional English closed forms of fixed meters and rimes while maintaining the distinctive poetic structures, vocabulary, and rhyming schemes of those royal Chinese poems. In addition to the conventional discussions of literary merits, this paper focuses on the comparison and contrast between the emperor's thoughts about acquiring Taiwan as recorded in the historical documents and those as described in his poems, which hopefully could provide more insights into this major military achievement in early Qing dynasty**.**

Keywords: Kangxi, Shi Lang, Taiwan, Zheng Ke-shuag, Poem, Translation

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Introduction

During his 61 years of reigning, Kangxi (康熙 A.D. 1654-1722) achieved many military successes, which not only contributed to fortifying the political foundations of Qing's ruling, but also resulted in its territory being expanded to a size never before achieved in China. Yet, of all those military accomplishments, defeating Zheng Ke-shuang's (鄭克塽) navy off Penghu (澎湖) and consequently claiming Taiwan as part of Qing territory would likely have a special meaning to the Emperor because Zheng's force was closely tied to the loyalists to the Ming dynasty, and his surrender had directly caused the capture of many remaining Ming royalties, which formally signified the end of Ming. There are a total of four poems in The Complete Works of Emperor Kangxi (康熙帝御制文集) that mark his military strategies towards and political thoughts about acquiring Taiwan. In this paper I will try to first, translate them into English in accordance with the conventional poetic forms; second, analyze their merits both as Chinese and English literary works; and lastly, discuss their values as a historical document with regard to this major event in early Qing dynasty.

The first poem to be discussed is entitled "Heard the News of Victory on the Day of Mid Autumn 中秋日聞海上捷音" which is translated as follows:

Bows were hung up early on the hibiscus plants ten thousand miles away;
The military forces of water rhinoceros pointed at the island's vacant gate.
They came to the courtyard not necessarily to nurture cultures and virtues;
I have originally preferred diplomacy to military forces for this remote place.
The acceptance of surrender was held in a tent beyond the autumnal colors;
Amidst the bright moon light, the palace guards reported the victorious gains.
I have long concerned about the hard lives of those islanders across the sea;
Henceforth harvesting and welling in all nine territories will become the same.

萬里扶桑早掛弓，水犀軍指島門空。來庭豈為修文德，柔遠初非顯武功。牙帳受降秋色外，羽林奏捷月明中。海隅久念蒼生困，耕鑿從今九壤同。（527）

In its original Chinese form this poem is in strict conformity with the seven-character regulated verse (七言律詩) which requires a total of eight lines in parallel structure, seven characters in each line, stipulated tonal sequences, and rhyming at the end of every even line. However, in this work the second line is also rhymed, which is reflected in the English translation. Since it is unlikely to transliterate the seven Chinese characters in the original poem into seven English words, or transliterate the original seven Chinese monosyllabic characters into equal number of English syllables, I have tried to adapt Gerard Manley Hopkins' concept of "sprung rhythm" which utilizes variable sets of sounds instead of traditional accented meters (Abrams 1545). Instead of counting syllables, the translation adopts the similar sets of words as those in the original. For example, in the first line of the original, there are basically four sets of characters: ten thousand miles (萬里), hibiscus plants (扶桑), early (早), and bows hung (掛弓). All of them show up in the translation albeit rearranged according to English syntax. Additionally, in order to mimic the appearance of the Chinese regulated verse form, all lines in the English translation contain equal number of letters and spaces. As the emperor doesn't use any particularly difficult diction in

the original, neither does the English translation. Hopefully all this could help to retain the flavors of the original work.

Like many classic Chinese regulated verses, the major imagery in this poem is natural scenery, which is used as a backdrop in contrast to the political or military actions which are the primary theme of the work. The hibiscus plants are contrasted with the moving navy forces; courtyard with remote military actions; oceans and lands with the hard living conditions of the locals. While not necessarily outstanding by themselves, those images present vivid scenes taken place in those successful attacks over the islands. The most memorable among them is probably the surrender ceremony around autumnal nuances, which the palace guards speedily reported to the emperor under the bright moonlight.

In terms of official history, this poem reveals some insights about the emperor's involvement in the military and political strategies toward Taiwan. First, he was very well informed of the battle plans and overall strategy designed by the commander of the attacking forces, Shi Lang (施琅). According to an official account of the battle: "At seven o'clock in the morning on the 22nd day, after sufficient revamping and full rest, the Qing forces started a general attack against the Zheng forces on Peng-hu. After nine hours of fierce battles, the Qing forces won a complete victory. As the sea warfare over Penghu ended, the Qing forces gained huge advantages over the Zheng forces by posting large number of soldiers by their border [二十二日早七時，經過充分休整和準備的清軍向澎湖鄭軍發起總攻。經過 9 小時激戰，清軍取得全面勝利.]" (Ren and Wu). The first couplet of the poem accurately and concisely describes the gist of this narrative. In the next couplet the emperor points out that his forces are not there to nurture the virtues of the locals, nor were they there to exercise militarism, implying that the ultimate strategic guidance is "appeasing through attacking," which is exactly how it took place as recorded in the historic document: "At this time, to fulfill the overall strategy of "appeasing through attacking, Shi Lang gave order to temporarily stop the military attacks so that they could refurbish the troops and ammunition to prepare for the attack of Taiwan on one hand, and on the on the other hand, adopted measures to move the problem of Taiwan towards political solution   [澎湖海战结束后，清军对台湾郑氏集团已形成大兵压境的有利态势。这时，施琅为贯彻"因剿寓抚"的战略方针，下令暂停军事进攻，一面休整部队，补充弹药给养，作好进攻台湾的准备；一面采取措施，推动台湾问题向政治解决的方向发展]" (Ren and Wu). In the third couplet Kangxi visualizes how Zheng Ke-shuan (鄭克爽), the young leader of the Zheng forces, surrendered to Shi Lang, and the news happened to reach him on the day of the mid autumn festival which redoubled his mood for celebration. The history account points out that on the 15th day of the seventh month, Zheng Ke-Shaun accepted the suggestion of Liu Guo-Zhang (劉國璋), one of his ministers who negotiated with the representatives from Shi Lang, turned in the gold seal of Prince Yen-ping, Superior Conquest General, and formally surrendered to the Qing forces (Li Chun-guang 90; Ren and Wu).

Yet the most important insight of this poem probably lies in the last couplet because it reveals the emperor's real goal for this military action. Immediately following the victory, Li Guang-di (李光地), a ranking cabinet minister, advised the emperor that "standing alone beyond the ocean, Taiwan could easily generate thieves and bandits.

It would be better to move out the local residents, and forfeit our ruling over it" ("一派認為台灣孤懸海外，易生盜賊，應將當地百姓遷出，放棄對它的統治" Ren and Wu). Shi Lang, on the other hand, strongly urged the emperor to do the opposite. In his "Memorandum regarding Keeping or Abandoning Taiwan" (恭陳台灣棄留疏) submitted to Kangxi in 1865, one year after the war, he explained the major advantages of taking the island permanently under the Qing rule on account of its geological position that could affect the safety of the four southern coastal provinces, and its agricultural and commercial potentials that could financially benefit the central government (Ren and Wu; *Epoch Times* Cultural Group). As a matter of fact, based on the conclusive couplet of this poem the emperor did not need any persuasion in this regard because he had long been concerned about the poor living conditions of the people in Taiwan and had always wanted them to be reunited with the other territories of his empire.

The next poem to be discussed is a quatrain of five characters which is entitled "Composed Another Five-Character Quatrain on the Same Night Facing the Moon 是夜對月再成絕句." It is translated as follows:

On the mid-autumn festival when the moon is bright,
A message has arrived speedily from beyond the sea.
From this day forward along the Milky Way in the sky
Ten thousand miles of smokes and clouds are cleared.

明月中秋節，馳書海外來。自今天漢上，萬里煙雲開。（527）

As there are only five characters in each line in this Chinese quatrain, the number of words in English translation is naturally shorter than that in the seven-character regulated verse: instead of four sets of words in each line of the previous poem, there are now only two or three sets in each line in correspondence to its Chinese original, such as bright moon and the Mid-autumn Festival in the first line; speeding letter and coming from beyond ocean in the second; time indicator and milk way in the third; and distance indicator and opening clouds and smokes in the last line. While the rhyme scheme in the original is ABCB, in the translation it is ABAB so as to reflect the tradition of an English quatrain. Similar to that of the previous poem, the diction in this work is relatively unsophisticated as seen in the translation.

Classic Chinese literary criticism expects a five-character quatrain to be "more concise than already concise, more simple than already simple, putting together four sentences as if one sentence, transmitting intense emotions into one single word [绝句大恉，则又已精而益求其 精，已简而益求其简，欲四句如一句，绎稠情于单词]" (Li Xiao-hong). Based on those standards, this poem should get high mark considering its simple imagery not only vividly presents Kangxi learning of the victory on the night of moon festival, but also succinctly expresses his elation over such a military achievement. Additionally, full moon symbolizes the reunification between the Manchu government on the mainland and the Zheng forces on the island of Taiwan. Bright moon beams clearing up the clouds along the Milk Way signifies a peaceful country after the reunification. All those celestial images figuratively give testimony to the emperor's inner feelings towards this historical event.

The third poem to be discussed in this paper is entitled "A Poem Given to Shi Lang, with a Preface 賜施琅詩 并序." The preface in its Chinese original shows fine prosaic quality, and it sounds almost like a poem, which is translated as follows:

The atmosphere overseas has not been peaceful.
Battleships appearing and disappearing,
Shocked even the high ocean waves.
The coastal residents have suffered loss of work
In fishing, salt mining, silk weaving, and farming.
I have constantly pitied them in my heart.
Lately, the turmoil in the provinces of Dian, Qian,
Long, Shu, Hu, Xiang, and Baiyue have all been quelled.
Only the tiny island of Taiwan remains rebellious,
Taking advantage of its geographic positions.
Shi Lang took my orders to march to the conquest,
Planning and deciding on the attack strategies.
Wherever the battleships were pointing at,
All commanders and soldiers shared one heart;
Then they captured the entrance of the island,
Forcing close towards its battalions and dens.
Their bravery robbed the enemy of its spirit;
Their sincerity prompted the enemy to surrender.
When the message of victory arrived the palace,
It happens to be the day of mid-autumn festival.
While enjoying such an auspicious time,
I was pleased to hear of the triumphant news.
Recalling that a pure heart from the coast
Was allowed to ascend on my platform,
To relieve me of my worries of the South,
I took off the coat I am wearing this day,
Speedily delivered to him with a poem.

海氛之不竫，艟艟出沒，波濤震驚。濱海居民，魚鹽蠶織耕穫之利，咸失其業。朕心恆憫惻焉。邇者，滇黔隴蜀湖湘百粵，悉底敉寧。蕞爾台灣，阻險負固尔。施琅銜命徂征，決策進取，樓船所指，將士一心，遂克島門，迫其營窟。勇以奪其氣，誠以致其歸。捷書到闕，時值中秋。對此佳辰，欣聞凱奏。念瀛壖赤子，獲登衽席用紓南顧之憂。惟尔丕績，即解是日所御之衣，馳賜載褒以詩.

There is no rhyming in the original preface, nor is that in the English translation. As the predominant number of sentences in the original consists of four characters, so the lines in the translation are relatively shorter. To maintain the nature of a poem, a couple of sentences with eight or nine characters in the original are broken into two lines as run on sentences in the translation which still shows the parallel structure of the original. William Wordsworth has argued in his "Preface to the Lyrical Ballads" that there is not that much difference between a fine prose and poetry, which interestingly could be evidenced in this preface by the emperor (Perkins 427).

In addition to the literary merits, this preface could very well serve as a primary source for the historical studies of the recovery of Taiwan. It illustrates, from the emperor's own words, the causes of the attacks, concerns about his subjects, considerations of the overall political conditions, decisions for commander assignment and the military strategies he had made, reasons for the final victory, and actions taken to reward the general. In short, it precisely sums up the background of the military movement as reported in numerous history accounts (Su).

The emperor basically compresses the similar narrative in this poetic work which is translated as follows:

The entire armies have entered the island and
Captured it by only one siege on the blue sea.
With imperial edict to dismantle dragon palace,
They lowered sails and came to the mirage city.
The admiral was able to give his best to achieve
The marvelous work to foil the enemy's strategy.
His fame is equally eminent as Taming Waves;
Henceforth all southern waters will be in peace.

島嶼全軍入，滄溟一戰收。降帆來蜃市，露布徹龍樓。上將能宣力，奇功本伐謀。撫(伏)波命(名)公(共)美，南紀盡安流。（527）

This is a five-character regulated verse which rhymes at the end of all even lines just like the seven-character verse; the similar rhyme scheme is seen in the English translation. Just like the five-character quatrain, the number of words in each line in this verse is shorter than that of the seven-character verse, and they also contain fewer images accordingly. As stated in the preface, this is basically a courtesy poem put together with the gift of a coat that the emperor was wearing delivered to the general as a reward for his great military success. It is little surprise that not many literary merits can be found in this poem; nevertheless, it demonstrates how the emperor was impressed with Shi Lang's military talent, the phenomenal victory, and its long term effects on the peace of the southern coast. It proves that deeply in his mind the emperor never viewed this military action as merely quelling a local rebellion but as a part of his overall strategy to maintain stability of the entire southern regions.

The last poem to be discussed is entitled "A Narrative about the Conquest of Taiwan at the Sacrificial Ceremony in the Tomb of Emperor Shunzhi 臺灣平告祀孝陵有述" which is translated as follows:

Our bequeathed military forces have now calmed the vast seas;
On an auspicious day I come to the royal tomb to pay respect.
A thousand layers of mountains hold up the emerald green hills
As the five benevolent clouds are being condensed by purple air.
Your saintly virtues have brilliantly left us with great prosperities;
Displayed in a grand scale are the divinely designed strategies.
The universe is energized by the powers of opening and closing;
Rises of the sun and the moon demonstrate the signs of eternity.
For numerous generations have been gathered songs of praises;
In numerous locations existed abundant astrology and almanacs.

Foresighted plans already thought to protect their descendants;
Grandiose accomplishments intended for the dragon to ascend.
Various plants and grasses all come to enjoy this huge success;
Hereafter the whale-like soaring monstrous waves will be tranquil.
Respectfully and immaculately following the old ceremonial rules,
Ten thousand seasonal sacrificial foods are presented solemnly.

纘武平瀛海，諏辰謁寢陵。翠微千嶂拱，紫氣五雲凝。聖德光垂裕，神謨大顯承。乾坤資翕闢，日月象升恆。奕世謳歌集，多方曆數膺。遠猶思燕翼，盛業想龍興。卉服皆來享，鯨波自此澄。明禋稽舊典，萬禩肅嘗蒸。（529）

This is a long regulated verse of five characters. The original consists of 16 lines. Unlike all the previous verses that uses the same rhyme throughout the poem, the rhyming scheme of this work is ABCB DEFE respectively on each of the octave as shown in the English translation. As an occasional poem presented at a ritual, most of the imagery and narrative simply follow the traditional norms thus lack distinguished literary qualities. However, the picturesque depiction of the green hills surrounded by the chilly air and colorful clouds in the second couplet is beautiful; the references to the military victory which directly ties to the title of the poem provide another first-hand evidence of the emperor's thoughts about the conquest.

Conclusion

There are altogether four poems collected in *The Complete Works of Emperor Kangxi (*康熙帝御制文集*)* that deal with the military actions against Taiwan While those poems composed of various conventional Chinese poetic forms are not necessarily considered brilliant literary works, some of them do occasionally produce outstanding images and narratives. The more important value of those poems is its presentation of the emperor's thoughts and feelings about this historical event. In his detailed review of the studies by scholars across the Taiwan Straights about Emperor Kangxi's reunification of Taiwan with the Qing Empire, Professor Li Xi-zhu (李細珠) emphasizes the need to search for new data to further our understandings of the topic. Studying the emperor's poetry would most likely fulfill this purpose (66).

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Wide (Conscious) Heart - Idioms in Montenegrin and Japanese Language

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Abstract
The aim of this paper is to use the method of contrastive lexical-semantic analysis to establish the (mis)match of the lexical and semantic structure of the idioms that consist of the lexeme that is going to be translated in English for now as a „heart" (*srce* and *kokoro*) in Montenegrin and Japanese language - which we would usually perceive as the location of feelings. Therefore, this study aims to test the extent to which this can be confirmed, in the case of proposed cultural models of this body part. The corpus for this research, which consists of 127 somatisms (idioms which contain at least one body-part term as a constituent), are being singled out from general and phraseological dictionaries, media, as well as from electronic sources. The data are analyzed primarily from a cognitive point of view, with the aim of establishing whether the two languages are comparable in terms of the meaning of the idiom as a whole. Secondly, the approach used for the analysis originated in Lakoff and Johnson's "Metaphors we live by" (1980, 2003). The basic claim of this interpretation is that the mind is inherently embodied, although it is mostly unconscious and abstract concepts that are metaphorical. The study is showing that conceptualizations of certain body parts in both languages are not arbitrary but are motivated by a small number of cultural models elaborated by conceptual metaphors. Therefore, the somatism "heart" is not immanent to speakers of different languages, it is not universally present in languages.

Keywords: Idioms, Somatisms, Conceptual Metaphor, Montenegro, Japan, Kokoro, Srce, Heart

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Introduction

In addition to cultural influence, the meaning of idioms in a language is motivated by the specific role that a certain part of the body plays in that cultural model, in the case of this paper - the role of the lexeme that is going to be translated in English for now as „heart". In the following, we will examine the rich networks of meanings related to idioms that use the Montenegrin lexeme *srce*, ie Japanese lexeme *kokoro,* and which we would usually perceive as the location of feelings. Therefore, this study aims to test the extent to which this can be confirmed, i.e., to explore whether the body parts mentioned are used in phraseologisms with their traditional roles and symbolism (e.g., THE HEART AS THE CONTAINER FOR EMOTIONS), and to what extent we can find the correspondence between Montenegrin and Japanese in the field of a particular body. Furthermore, the paper wants to show that conceptualizations of certain body parts in both languages are not arbitrary but are motivated by a small number of cultural models elaborated by conceptual metaphors.

The hypothesis that the paper raises is that the use of the so-called somatism (idioms that use a part of the body as one of the lexical components) "heart" is not immanent to speakers of different languages, it is not universally present in languages. Diversity, inconsistency, but also universals of idiomatic terminology, wherever possible, are pointed out.

The discussion of the metaphorically rooted idioms of Montenegrin and Japanese language is meant to demonstrate the experiential and embodied aspect of mental activity of concrete examples from two genetic, areal and typologically very different languages.

Methodology

This study uses the method of contrastive lexical-semantic analysis to establish the (mis)match of lexical and semantic structure of the observed idioms - in this case the lexeme heart (*srce* and *kokoro*) in these two languages, that is, the way in which the speakers of the two linguistic and cultural communities conceptualize the contents expressed through these somatic idioms.

The examples for this corpus have for the most part been constructed by authors, occasionally on the basis of an utterance that authors have seen or heard used, singled out from general and phraseological dictionaries, media, as well as from electronic sources. In addition, some of the examples have been taken from other linguistic studies.

Theoretical framework

This research will use the metaphorical concepts already set out in George Lakoff and Mark Johnson's book *Metaphors we live by* (1980, 2003). Although the conceptual metaphor in the works of Lakoff and Johnson from its very beginnings has been umbilical cord-related to language, its fundamental nature in that tradition was actually conceptual rather than linguistic. This means that the conceptual metaphor is not a metaphor that serves to decorate the language but permeates everyday life.

Conceptual metaphors, expressed in the formula a is b, consist of a source and a target domain. The source is generally a more physical domain whereas the target a more abstract one. That is why conceptual metaphors are usually unidirectional. The choice of particular pairings of source and target domains is motivated by an experiential basis. Such pairings, primarily conceptual in nature, give rise to metaphorical linguistic expressions.

As Lakoff and Johnson (1980, 2003: 8) say, our usual conceptual system, in which we both think and act, is basically metaphorical. Bearing that on mind, this work will define idioms as, on a fundamental level, determined phrases that are metaphorical in nature, and connected to the understanding of the culture; somatism – or body idioms, simply as idioms that use the part of our body as one of the lexemes. Those idioms are enriching all languages and are proof that we perceive the world around us anthropocentrically, starting from ourselves.

Analysis based on extracted somatisms *srce*: *kokoro*

From the analysis based on extracted *srce*[1] and *kokoro* somatism (table at the end of the paper), what can be concluded is that the heart provides metaphoric conceptualizations for love and sadness and is also involved in conceptualizations of cultural values such as compassion, cruelty, courage, encouragement, generosity, kindness, seat of joy, tenderness, affection, bliss, cordiality, enthusiasm, but also conscience, remembrance, and so forth. It is a CONTAINER for emotions, people, and objects that can enter it and leave it, showing the movement of the *kokoro*, as well as *srce* in the bodily space, due to strong emotions (in love, fear, anger, anxiety), capable of IN-OUT, UP-DOWN movements and WIDE-NARROW image schemas. In addition, the width and size of *srce* and *kokoro* are associated with infinite generosity (the domain of width is mapped to the domain of generosity, so we are talking about the conceptual metaphor GENEROUSNESS IS WIDTH), while weight is associated with emotional suffering.

Both, *srce* and *kokoro*, can also indicate a person's uncomfortable mental state, unpleasant feelings. The feeling of relief, liberation from great worries, problems, or some rigor takes place by removing the burden and weight that put the pressure on *srce* on one side, and conceptualization of lightness of the *kokoro* represents the feeling of relief. On the other hand, the conceptualization of lightness in Montenegrin is presented with meaning (to do something) without hesitation, calmly, easily: WEIGHT IS BAD, LIGHT IS GOOD.

Srce in Montenegrin is the container of emotions of great depth. Everything that comes from the depths of the heart is of stronger intensity than if it comes from another part of the heart. Japanese idioms share this meaning: DEPTH IS GOOD. However, in Montenegrin if something is at the bottom of the heart, it is hidden and hard to reach. The depth of the heart shows stronger intensities of feelings, and idioms show that there are also negative feelings hiding there at the bottom of the heart, such as contempt,

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[1] It has been detected that in some idiomatic expressions in Montenegrin language, the lexeme *srce* can be replaced with the lexeme *duša* (soul), while this is not the case with the Japanese corpus, noticing another cultural difference in the level of utilization of the concept of the soul in both languages: 魂 - damashi (soul) in Japanese is associated with health, it gives the vital energy to one in whom resides, but not character, like in Montenegro: *imati dobru dušu* (to have a good soul...).

disappointment, anger, and immense sadness - DEPTH IS BAD. Furthermore, in Montenegrin corpus of somatisms, the necessity of the presence of other persons in this container has been noticed. This necessity occurs in idioms that represent the provocation of someone's compassion, longing for someone: HEART IS A CONTAINER.

Those two languages share phrases that emphasize the hurt of one person's feelings due to the inappropriate behavior of another (other) person: physical pain has been conceptualized as an emotional pain. Through the somatism of breaking the heart, ripping the heart, tearing the heart, the HEART IS conceptualized as A SENSITIVE OBJECT (Niemeier, 2003: 205, in Novoselec, 2019: 163), i.e., it is elaborating the conceptual metaphor HEART IS AN OBJECT (Niemeier, 2003: 205, in Novoselec, 2019: 163). The same is with the conceptualization of a HEART AS A VALUABLE OBJECT (which can be stolen). In both languages the heart means kindness, mercy, nobility, (compassion), sinlessness, generosity. On the other hand, through idioms with the lexeme heart, phrases related to undesirable traits, lack of concern for others' feelings, insensitivity has also been found. They share idioms that indicate the honest way in which a person performs various activities, where we find conceptualizations of purity, openness and softness: SOFT IS GOOD and TOUGH IS BAD. Both languages also share metaphorical conceptualization BIG IS GOOD and SMALL IS BAD, and the metaphor HEART AS A CONTAINER FOR FEELINGS, or FEELING IS THE CONTENT THAT FILLS THE CONTAINER.

Along with change of texture, strength and size, the heart in Montenegrin and Japanese language is also conceptualized as changing in temperature. Moving the place of *kokoro* and *srce* is associated with both care and positive emotions in the form of thrilling and excitement. The place for the heart in the body is spatially ambiguous. The HEART does not settle in one place or one position but is imagined AS A MOVABLE OBJECT.

With negative emotions or when connected to fear, the heart moves downwards in both languages, which would be in line with the orientation metaphor BAD IS DOWN. The heart is conceptualized as *dropping out of fear*. Someone who needs encouragement needs their heart to be lifted up. Coldness of *kokoro* is considered as the absence of mentality, emotions (in Montenegrin, coldness of the head refers to the control of emotions), while warmth of *srce* and *kokoro* is associated with cordiality, and the heat with passion and enthusiasm. The possibility of opening *kokoro* and opening *srce* confirms the conceptualization of both as an EMOTIONALLY FILLED CONTAINER. If we open this content, we show our deepest feelings, trust each other, we resent each other. The HEART continues to be conceptualized AS A CONTAINER in which feelings are located.

Through idioms that conceptualize closeness, elaborations of the conceptual metaphor INTIMITY IS CLOSENESS (Kövecses, 2003a: 92, in Novoselec, 2019: 134) as LOVE IS CLOSENESS or EMOTIONAL AFFECTION IS CLOSENESS, has been noticed. What has to be pointed out is that the conceptualization of receiving something to the heart also expresses memory, i.e., it belongs to the "conscious heart" or "heart memory".

The conceptualization of closeness, as a more important concept than distance, is motivated by the conceptual metaphor IMPORTANCE IS THE CENTER (Kövecses, 2003a: 90, in Novoselec, 2019: 134) that has been found in both languages.

At the end, metaphorical conceptualization of the HEART AS INSTRUMENT OF UNDERSTANDING, HEART AS A MENTAL SPACE has also been found out, which will be further analyzed. It is interesting to extract those idioms as to show how memory, which is usually associated with the head/brain comes to be associated with the heart, which will be further mentioned as a *conscious heart* in Japanese and *emotional memory* in Montenegrin.

Kokoro as a conscious heart in Japanese language

First of all, it can be said that *kokoro* is the center of both emotional and cognitive sensitivity (the heart is the container of feelings and emotions, separate from the head and conscience which embody the rational). Thus, the Japanese explanatory dictionary, *Nihon kokugo daijiten* (2002: 657, in Nakaya, 2019: 3), defines *kokoro* as "the organ controlling rational (intellectual) and mental (emotional) processes in a human being, or these processes themselves". It is interesting that, when Japanese discuss their thoughts through the *kokoro*, they usually show their chest, not their head. To better understand the meaning, it should be noted that *kokoro* is an abstract term. However, it has its own location and is located in the mune (chest / breasts)[2]. Also, when discussing feelings or the heart, the concept of *kokoro* always appears in the conversation.

The most common translation of *kokoro* is "heart, soul and mind". But one of the problems of discussing *kokoro* is precisely in connecting words with the conjunction "and", which implies a division that simply does not exist in Japanese. Three are not interconnected as one: they are one. Kasulis (2008: 3) explains that the conjunction "and" in translating *kokoro* might lead someone to think that *kokoro* is a combined function of two separate abilities, one affective and the other intellectual, but this is not the case. Kasulis further explains that to translate *kokoro* as "heart and mind" would be the same as to translate the Japanese word for "water" (*mizu*) as "a compound of hydrogen and oxygen." It's not that the translation is incorrect, it just lacks a point, at least in a plain context. When ordering a glass of water, we are not considering it as a compound of two elements. Similarly, in ordinary Japanese terms, *kokoro* does not represents a compound. Therefore, Kasulis proposes the translation of *kokoro* as a "mindful heart", which this research is going to accept because it could, actually, be the closest translation of this concept.

Kokoro does not necessarily refer to a person's mental space; it can also refer to similar inclinations of animals or (abstract) objects, when a Japanese person metaphorically projects a *kokoro* into the world of a non-human. Kasulis (2008: 7) gives another explanation here: "In many contexts a key characteristic of *kokoro* is that it involves a propensity for engagement, a sensitivity expressed as either being in touch with something else or being touched by it. Through such engagement, meaning—whether factual or valuational— comes into being. Hence, *kokoro* is what makes responsiveness possible. Indeed, in many if not most contexts, *kokoro* involves both being in touch and being touched. That is, the responsiveness is bi-directional. In the Japanese case this mutual responsiveness undoubtedly had its historical roots in an ancient animism, a vision of reality as a field of intersensitivities and interactions. In that ancient perspective, the world was feeling and responding to us as much as we were responding

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[2] Links between *kokoro* and the chest region are evident in Japanese Sign Language. The sign for *kokoro* is a circle made by the thumb and right index finger over the left side of the chest, where the heart organ would be located (Tani 2005: 165, in Occhi, 2008: 5).

to the world. But even if we moderns would prefer to bracket out the metaphysics implied in such an animistic worldview, we can still make sense of this claim to mutual responsiveness on the experiential, phenomenological level. I have already used the phrase "being in touch with and being touched by." Even when we consider touching in its most mundane and limited physicality—the experience of tactile touch—we find reciprocal responsiveness. When my finger is in contact with the table in front of me, my finger puts pressure on the table while the table puts pressure on my finger. My finger is simultaneously touching the table and being touched by it. In my touching the table, it is as if the table meets me halfway, imposing increasing pressure as my finger moves forward. From this perspective, the touch is in the betweenness of my finger and the table. We would not find it strange to say the "table resists" my finger's passage through it."

The representation of the object-body, however, divides myself and my body by giving my body a sense of exteriority. I am therefore both the subject that is doing the touching as well as the object that is being touched (Ichikawa, 1991: 23 in Nagatomo, 1992: 19–20). As Nagatomo writes, the fact that "I am able to turn into an object that is capable of being touched means that I am a thing among the shaped things in the world, and therefore acquire a contingency by virtue of the fact that I have the body qua object" (1992: 20). For Ichikawa, then, the body is not an entity, but a relational existence between the other and the self.

Somatism with *kokoro* as a mental space[3]:

→ *kokoro ga tsuyoi* (strong *kokoro*): strong mentality → **Mne:** *snažan um* (strong mind)
→ *kokoro ga yowai* (weak *kokoro*): weak mental strength → **Mne:** *slaba glava* (weak head)
→ *kokoro gawari* (change *kokoro*): change the mind, change the thoughts → **Mne:** *promijeniti um* (change the mind)
→ *kokoro wo mu ni suru* (bring *kokoro* to naught): free your mind → **Mne:** *pustiti mozak na otavu* (let the brain graze)
→ *kokoro ni kakeru* (hang something on one's *kokoro*): intend; look forward to; bear in mind
→ *kokoro ni ukabu* (float in one's *kokoro*): think about something
→ *kokoro no oni ni suru* (demons in one's *kokoro*): alarmed conscience
→ kokoro wo irekaeru (replace *kokoro*): turn over a new leaf
→ *kokoro no soko* (bottom of one's *kokoro*): real intention
→ *kokoro ni tomeru* (to stop one's *kokoro*): pay attention to
→ *kokorozuku* (*kokoro* is placed): notice; realize; sense
→ *kokoro ni kizamu* (to engrave into *kokoro*): to etch into one's mind; to remember well
→ **Mne:** *urezati u srce* (to engrave into heart)
→ *kokoro midare* (confused *kokoro*): lack of forethought
→ *kokoro no semai* (narrow *kokoro*): narrow minded → **Mne:** *uskouman* (narrow minded)

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[3] The construal of *kokoro* as the locus of understanding, is also evident in Japanese Sign Language. The verb *wakaru* 'understand' is signed by passing the right hand downward over the chest (Tani 2005: 445, in Occhi, 2008: 5). Its negative form, *wakaranai*, is signed by curling the right hand and stroking from the chest towards the right shoulder, away from the heart region, as though knowledge has not entered there (Ibid).

→ *kokoro ga oreru* (*kokoro* is collapsing): enormously discouraged, feel like you cannot recover mentally easily

→ *kokoro no kate* (food for *kokoro*): food for thought

→ *kokoro no kizu* (scar of *kokoro*): emotional scars; mental trauma

→ *kokoro wo yomu* (read *kokoro*): to read somebody's thoughts, to guess what someone is thinking

→ *kokoro wo yamu* (*kokoro* is sick): to suffer a mental illness, to have psychological

→ *kokoro gakeru* (hang *kokoro*): to keep in mind, to try, to aim, to endeavor

→ *kokoro eru* (gain/get *kokoro*): to know, to understand, to be aware of

→ *kokoro gamae* (build *kokoro*): preparedness, mental attitude, frame of mind

→ *kokoro nashi* (without *kokoro*): lacking in judgement

→ *kokoro kubari* (distribute *kokoro*): thoughtfulness, consideration

Emotional memory related to *srce* in Montenegrin language

Stanojević (2017: 19) notes that (today) we understand the emotions that come from the heart as those that are closest to what we really want, to what is certainly truly worth to us. In Montenegrin culture, the heart (*srce*) is presented as a container of emotions, as a space in which the human essence is located.

Although it is realistically impossible to find the remnants of the conceptualization of the HEART AS THE SEAT OF THE MIND in the Montenegrin language, it is possible to find several expressions that Novoselec (2019: 181) calls "emotional memory", mentioning it through the conceptualization of receiving something to the heart (→ *primiti nešto k srcu*).

The phraseme → *govorim iz srca* (I speak from the heart) expresses sincerity, but it is being included in the feelings because it is halfway between the emotional and the mental. The idiom → *biti čistog srca* (being pure in heart) - on the one hand means goodness, mercy, apathy, while on the other hand, a pure heart is considered to be the basis for understanding, as the basic state of effective communication. Therefore, *srce* is being also a process of thinking and making decisions. It encompasses the state of the heart as the basis for decision making.

These are idioms that show that feelings or information that we are emotionally attached to and do not want to forget, are stored in the heart. For example, *u srce* ili *na srce* (in the heart or on the heart) we put something that is of great importance to us, that we must not forget or that we want to keep from oblivion: → *živjeti u nečijem srcu* (to live in someone's heart) (Novoselec 2019: 181). Novoselec gives a few more examples[4] of which we have singled out the following:

→ *izabranica srca* (the one, chosen by the heart) - where the mental aspect of the heart as an ancient center of reason is also observed. The heart is metaphorically conceptualized as an entity that has its own will, deliberation, i.e., it is about its possibility of choosing and wanting, which are cognitive processes.

→ *urezati se kome u srce* (to incise in someone's heart) and → *usjeći se kome u srce* (to be cut into someone's heart) - both idiomatic expressions at the semantic level express an unpleasant experience that is remembered. Hence, a cognitive element is

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[4] from Croatian language, but a match with Montenegrin is present

present in both idiomatic expressions: in the memory we see elements of the intellectual model of the heart as the center of reason, the one connected with emotions.

→ *živjeti u čijem srcu* (to live in someone's heart) - in the heart we have something to which we cultivate sympathy, but still the concept of memory is profiled with the aim of not forgetting. Something that pretends to be permanent, and that is protected from oblivion, is being created.

→ *ostati u srcu* (to remain in the heart) - when someone or something moves us - it remains in the heart; we become emotionally attached to that something/someone, the heart becomes a vessel in which we store the memories we try to preserve from oblivion.

→ *u dubini srca znam/smatram/mislim/vjerujem* (in the depths of the heart I know/I think/I think/I believe) where it seems that, as Foolen (2008: 389) notes, those opinions and knowledge that are distinctly related to the being are still in the heart, while encyclopedic and everyday knowledge is in the mind.

Novoselec (2019: 181) mentions another example:

→ *koliko god ti srce želi/zaželi/hoće* (as much as your heart desires/wishes/wills) - in this idiom the heart is conceived as an entity that seems to have its own desires. Although related to the domain of feelings, the 'will' and the heart's reflection on boundaries (even if they are infinite) encroaches into the cognitive.

Discussion

The examined somatisms showed us that in Montenegro idioms reflect the dualism heart-mind, shared by Western cultural traditions. In this case, language makes a big difference between the rational and the emotional (which is placed in the heart) although some remnants of what we have called "emotional memory" are visible.

By studying these definitions, it is clear that *kokoro*, in addition to serving as a place to experience emotions, also functions as a place of experience what (in Montenegrin) could be considered mental, e.g., in references to 'will, knowledge, forethought'. As could be seen from the above mention *kokoro* as a mental space list of somatism, we managed to include 5 idioms in Montenegrin language that are sharing the meaning with Japanese counterparts, but using different body lexemes - mind, head and brain. Somatism in Japanese language combine the way of thinking with emotions, using the lexeme *kokoro* (conscious heart) - which means that decision-making and feelings are sharing or can share the same place in the body.

Here we cite a portrait of an interesting kanji, a Japanese symbol being used to write the verb *to think: omou*.

思 – the top of the kanji represented primarily the baby's fontanelle, viewed from above, from a bird's eye view, denoting the brain. The lower part is the symbol 心 - which means *kokoro*, or heart (in this case we will translate it simply as that). So *the brain and the heart* together mean *to think* (omou / 思う)[5].

Reviewing the meanings and structures related to somatism in Japanese and Montenegrin language, we were able to see how they contradict each other, and how these two languages, in addition to some similarities, also have very interesting

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[5] https://kanjiportraits.wordpress.com/tag/the-kanji-%E6%80%9D/

differences that *srce – kokoro* meanings carry. The importance of culture in metaphors became apparent.

Conclusion

This paper analyzed the idioms with the lexemes *srce* in Montenegrin language and *kokoro* in Japanese language, which refer to the description of emotional states but also mind processes.

By semantic and motivational analysis of idiomatic expressions in Montenegrin and in Japanese language this research came to the results that confirmed the hypothesis: that the use of the so-called somatism (idioms that use a part of the body as one of the lexical components) is not immanent to speakers of different languages, it is not universally present in languages.

Furthermore, through the analysis of somatisms in Japanese and Montenegrin, the research managed to show that *srce* somatisms in Montenegrin language represent mostly the separation of emotions from the intellect, while in Japanese language they represent the same thing – through the conscious heart (*kokoro*). The Western dualism upholds the reason-emotion dichotomy: thoughts and ideas come from the mind, largely disembodied, whereas desires and emotions reside in the heart as part of the body (see, e.g., Damasio, 1994; Lakoff & Johnson, 1999). We see that Japanese cultural conceptualization differs fundamentally from this binary contrast between mind and heart, i.e., mind and body. Hence the meaning of the lexeme *kokoro* obscures together the notions of mind and emotion, mind and body. On the contrary to *srce, kokoro* is the core of affective and cognitive structure, conceived of as having the capacity for logical reasoning, rational understanding, moral will, intuitive imagination, and aesthetic feeling, unifying human will, desire, emotion, intuition, reason and thought.

Finally, on the basis of analyzed somatisms, we will summarize the meanings of the words *srce* and *kokoro*.

Srce:
the tangible principle of human life - has its location
material things do not share it (though, we can metaphorically use it to express the inner part of a thing or plant which stands out by its purpose, softness, etc. [the heart of a pen; the heart of the watermelon...])
because of this part of the body, a person can be a good person
you can't think with this part of the body, although slight remnants of "emotional memory" are visible
with this part of the body, you can feel
this part of the body can be filled with both positive and negative emotions

Kokoro:
abstract principle of human life - has its location
material things can also have it
because of this part of the body, a person can be a good person
with this part of the body, you can think
with this part of the body, you can feel
this part of the body can be filled with both positive and negative emotions

In many cultures the dualism between heart and mind is often emphasized. As mentioned in the research - the heart in Montenegrin culture is considered the center of the emotional world (while the head, i.e., the mind is considered as the center of reason). The analysis managed to show that in Montenegrin somatisms with lexeme *srce* dominate this dualism, mostly shared by Western cultural traditions. Language makes a big difference between the rational (head/mind) and the emotional (heart) although some remnants of what we have called the "emotional memory" are visible in language. However, traditional cultures (which Japanese indeed represents) understood cognition broadly, and did not exclude the emotional world, and placed reason and intuition in the heart - which we can conclude from Japanese *kokoro* somatisms - where both intellectual and emotional functions are located.

If Johnson (1987) is right in claiming that the embodied mind yields embodied meaning, imagination, and reasoning, this research extends this to what Maalej (2004, 2007) calls "cultural embodiment," a kind of embodiment mediated and motivated by cultural imagination.

The meaning of idioms can only be fully captured if they are considered to be conceptual in nature. But, what has to be pointed out is that conceptual metaphor theory does not cover all the aspects of the behavior of idioms, or somatisms. In order to fully describe how the above mentioned somatisms with lexeme *srce* and *kokoro* function, further research, for example on conceptual metonymy, and culturally based concepts has to be also taken into account.

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The rest

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Appedices

Analysed somatism

Conceptual metaphor	Montenegrin	Japanese
GENEROUSNESS IS WIDTH, BIG IS GOOD	*imati srce; imati veliko srce; biti pravo srce; biti čistog srca; biti širokog srca*	*utsukushii kokoro, ookii kokoro, kokoro butoshi, hiroi kokoro, kokoro ga aru*
WIEIGHT IS BAD, LIGHT IS GOOD	*teret na srcu; teška srca; teret je nekome pao sa srca; kamen je nekome pao sa srca; olakšati srce; laka/lakog srca; mirnog/mirna srca*	*kokoro ga omoi; kokoro ga karui*
DEPTH IS GOOD	*puno je srce nekome, ispuniti srce; iz dubine srca*	*ippai kokoro; kokoro no soko*
DEPTH IS BAD	*na dnu srca-iz dna srca; iz dubine srca; biti nakraj srca*	
HEART as a CONTAINER FOR FEELINGS	*nositi nekoga ili nešto u srcu; imati nekoga u srcu; ići pravo u nečije srce*	
PRESENCE OF OTHER PERSONS	*raznježiti nečije srce; dirnuti nekoga u srce; srce nekome vene za nekim; biti sa nekim svim srcem; dotaći nečije srce*	*kokoro wo utsu*
OPEN IS GOOD	*pričati otvorenog srca; otvoriti svoje srce nekome; otkriti svoje srce; rasteretiti srce; isprazniti srce; otključati srce*	*kokoro wo hiraku*
HEART IS A SENSITIVE OBJECT	*slomiti srce nekome; lomiti srce nekome; iščupati srce nekome; razdirati srce nekome; parati srce nekome; raniti nečije srce; zariti nekome nož u srce; ujesti nekoga za srce; ubosti nekoga u srce; srce se cijepa/kida nekome; imati na srcu ranu*	*kokoro wo kudaku*
HEART IS PRECIOUS OBJECT	*osvojiti nečije srce; ukrasti nečije srce*	*kokoro wo ubau*

HEART IS the HONEST WAY of doing something	*smijati se od srca; otvorenog srca; iz/od sveg srca; ruku na srce; govoriti iz srca; biti čistog/čista srca; otkriti nekome svoje srce*	*kokoro ga kirei; kokoro kara; kokoro wo komete*
HEART IS A MOVABLE OBJECT (BAD IS DOWN)	*srce je na mjestu; srce (za)igra nekome;iskočiće srce nekome; nekome srce udara/tuče kao ludo; nekome je srce zadrhtalo; nekome je srce stalo od straha; steže se srce nekome; srce je nekome sišlo u pete*	*kokoro ga hazamu; kokoro ga odoru; kokoro ga ugoku; kokorozewashii; kokoromachi; kokorozumori; kokoro ochiru; kokoro dzukai; kokoro date*
SOFT IS GOOD	*biti meka srca; smekšati nečije srce; razmekšati nečije srce*	
TOUGH IS BAD, SMALL IS BAD, COLD IS BAD	*imati hladno srce; imati kameno srce/srce od kamen; imati čelično srce/srce od čelika; biti tvrda srca; nekome se ledi srce od straha; biti bez srca (duše) / nemati srca*	*tsumetai kokoro; kokoro ga nai; chiisai kokoro; kokoro no kaze*
WARMTH AND HEAT ARE GOOD	*biti toplo oko srca; imati toplo srce/dušu; srce/duša gori; ugrijati srce nekome*	*atsui kokoro; atatakai kokoro; kokoro o kagayakaseru*
INTIMITY IS CLOSENESS: LOVE IS CLOSENESS or EMOTIONAL AFFECTION IS CLOSENESS	*prirasti srcu nekome; uzeti, uzimati k srcu; primati nešto k srcu*	
IMPORTANCE IS THE CENTER	*dopirati do srca*	*kokoroyuku made*

E-Poetry, Performance, and Identity: Perspectives from Latinx Canadian Poets

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Abstract

This project studies e-poetic expressions—e-text, hypertext, video and recorded live performances and audio files, and other electronic or expanded forms of poetry—of Latin American writers in Canada. The relation to space, identity and culture interweave with imagined and embodied awareness that is expressed creatively though web presence, word, sound and image. How poetry is coded, encoded and performed visually and across soundscapes is vital for analyzing the meaning production in the works. This initial research phase traces common themes, links and divergences among the works. Case-studies include current works, interviews and a theoretical literature review, to produce a systematic study of responses by authors to what they consider the role of their e-works in society. The project reveals specific ways that these e-poetries innovate, contest and question the notion of local/national identity vis-à-vis global digital connections. In particular, the works negotiate new mixed cultural resonances in the experiences and writings of Latinx artists and question overly homogenous definitions of what is described by the term 'Latino' culture in Canada to posit an emergent "fourth space" of cultural expression. *(180 words)*

Keywords: E-poetry, Digital Arts, Performance, Latinx Identities, Diaspora Studies, Hispanic Cultures

Introduction

This project studies the e-poetic expressions of Latin American diaspora authors in Canada. Representing what I posit as a "fourth space" that is between interstices or areas of identification, communication and representation, these intermittent states-in-flux harbour an enigmatic sense of what being a Latino in Canada means.

A sociocultural approach resting on embodied hermeneutics allows the project to expand the terms of "third space" or hybrid identity theories (Bhabha, Vygotsky, Bourdieu, and Soja) to examine the state of 'in-between-ness' or 'cultural interstices' beneath the surface of "Latin-ness" in Canada. A growing sense of identity, beyond hyphens, has begun manifesting in several recent works by Latin American diaspora writers in Canada of several generations. These groups build upon previous networks forged by Hispanic diaspora communities and literary studies of Latino Canadian writing (Cheadle and Pelletier; Hazelton; Torres-Recinos), yet a cohesive cross-Canadian study of the current sense of identification of each to being "Latino," the differences among these and literary works have not been studied to a significant degree in recent decades. This research is needed to produce a clearer understanding of these voices, particularly those creating digital media poetry, and who are thus at the forefront of literary innovations representing Latinx identity.

The best known proponent of Third Space Theory is Homi Bhabha. He posits two initial sociocultural imaginaries and geopolitical positionings related to identity. These correspond, in Bhabha's theories of postcolonialism, to the first space of the indigenous culture of origin, and to the second as a colonial space that superimposes itself upon the first. The encounter of the two spaces creates a 'third space' of *inbetweenness*, where the persons of the original culture must negotiate what they can bring forth from the first subjugated space, to then interact with the second, the superimposed dominant space of colonial origin. It is in the emergence of the interstices that the overlap and displacement of the domains of each become enmeshed with gains and losses being incurred mainly by the first. As Bhabha suggests:

difference [is] that [space where] the intersubjective and collective experiences of nationness, community interest, or cultural value are negotiated. …Terms of cultural engagement, whether antagonistic or affiliative, are produced performatively. The representation of difference must not be hastily read as the reflection of pre-given ethnic or cultural traits set in the fixed tablet of tradition. The social articulation of difference, from the minority perspective, is a complex, on-going negotiation that seeks to authorize cultural hybridities that emerge in moments of historical transformation. (Bhabha 1994)

"The 'interstitial perspective,' as Bhabha calls it [in *The Location of Culture*, 1994] (p. 3), replaces 'the polarity of a prefigurative self-generating nation in itself and extrinsic other nations' with the notion of 'cultural liminality within the nation' (1994, p. 148). He elucidated that, in "The liminal figure of the nation—space would ensure that no political ideologies could claim transcendent or metaphysical authority for themselves. This is because the subject of cultural discourse—the agency of a people—is split in the discursive ambivalence that emerges in the contest of narrative authority between the pedagogical and the performative" (p. 148).

This project proposes that in the diaspora experience of Latino Canadians there is a fourth space that is also constantly in flux—such as the Bhabha's third space—but remains it hidden and undefined to some degree (thus is behind, beneath the third space). It could be described as the doubly peripherilized subject, or one that remains in the substrata of marginality; what remains hidden is, thus, of greater difficulty to negotiate and voice. This aspect questions to what extent there have been integrations of Latino identities into the multicultural possibilities in the country. As Mary Maguire indicates:

Canada is frequently portrayed as a multicultural society. This portrait of diversity is a result of centuries of and different waves of immigration patterns. …[When children ask where they come from, they engage with the history of their families and community. Thus,] …identities are discursively constructed. I use discursive here to mean particular ways of being, talking and writing about or performing one's practices that are coupled with particular social settings in which those ways of being, talking, writing and being are recognized as more or less valuable (Maguire & Graves, 2001). Third space then is an open text offering differing and multiple possibilities for selfhood and dialogue with others in particular places. (Maguire, 2005, p. 1427)

For Latino Canadians, however, there is a 'fourth dimension' that resides as yet outside the mainstream links with multiculturalism, and harbours a multiplicity of inherent multiverses of multicultural resonances within the Hispanic world as well.

The relation to space, identity and culture interweave in this study with imagined and embodied awareness that is expressed creatively though web presence, word, sound and image. Themes of immigration, nostalgia, belonging and transcultural futurities are communicated in hyper-space encounters that amplify the texts. Previous work I have published (Figueredo 2015, 2016a, 2016b, 2020) in this area includes analyses of video-poems by Hispanic women poets such as Melisa Machado (Uruguay), Rocío Cerón (Mexico), Lía Colombino (Paraguay), and Belén Gache (Argentina), the interrelationship of poetry and sound/music, and in spatially rendered works such as art and online installations.

The operational definition of e-poetry in the project is that posited by the Electronic Poetry Center (EPC). This organization, established and headed by Loss Pequeño Glazier and Charles Bernstein at SUNY-Buffalo, defines e-poetry as:

digital, visual media arts, sound, and language-based arts. Its emphasis is on literary practice in an encompassing sense, i.e. the practice of thinking through engagement with the material aspects of media forms, the building of community, and the exchange of ideas across languages, borders, and ideologies. Rather than considering 'new form' a qualifying criterion, it seeks to locate innovative artistic practice in its cultural, conceptual, and media milieu. Hence if digital literature is going to point to emergent artistic processes in a New Media age–inasmuch as they inform the digital– e- poetry can exist in any number of formats, including programmable, performance, visual, sound-based, conceptual, book art, hand held, tablet, immersive environments, game-based, and more. (2014-2018)

The specificities of "e-poetry" has been elaborated in Loss Pequeño Glazier's book *Digital Poetics: The Making of E-Poetries* (2002) who proposed that new technology

impacts not only the reception of poetry, but also how authors envision their work and the creative process. He posits the 'digital field' as "a real form of practice and immediately relevant to any informed sense of what we will call 'poetry' in coming years. But one must learn to see through a new lens, one with expanded focal points" (2002, p. vii).

Other terms to take into account of digital poetries include "two complementary categories of electronic poetry" laid out by Kevin Stein: "1. Video Poetry [that includes] Docu-video-poetry, [and] Filmic poetry/cin(e)-Poetry". 2. New Media Poetry [that is:] Fixed-text, computer-based poetry; Alterable-text electronic poetry; [and] collaborative/participatory media poetry" (p. 116). Each is rooted in 'the notion of 'play'" (pp. 115-116) associated with digital poetry in general, and to particular poetic forms we will be considering in greater detail.

In addition, and with closer cultural relation, the definition of e-poetry in this project also takes inspiration from the way the concept is elaborated by Mexican contemporary poet Rocío Cerón. Her preferred term is 'expanded poetry' as she specified in an interview during the Poetry Parnassus in London 2012, and about which she offers workshops (2016). As described on her official website, Cerón was one of the first poets to experiment with sound, performance and video to express the poetic word. Cerón's poems dismantle imperial by juxtaposing visual imagery with post-feminist and post-colonial symbols; she records and performs her poetry by reciting them in her voice with added sound elements that echo and interplay with the text projected visually in video and hypertext formats. The *Mexicanness* of her poems is at the forefront of these e-poems. Let us turn now to see how Latino Canadian poets perform theirs.

Methodology: Close Readings and Interviews of Latinx Poets

Three spoken word authors—Sergio Faluótico (Uruguay), Spin el Poeta (Guatemalan refugee) and Lady Vanessa (Colombia)—have been interviewed and recordings are being studied and mapped in relation to project themes. Faluótico's "Blues del inmigrante" [Immigrant Blues] and Spin El Poeta's Guatemalan rap duet with Indigenous musician called "Tz'ij: Cosmovisión Maya" fuse sounds from their original cultural heritage and generate contemporary dialogues. Lady Vanessa is a spoken word youth artist who grapples with the loss of language while persisting in her attempts to define herself as a *Latina*.

The resulting non-space or questioned space, which I term the fourth space, appears in the e-work to create a new social scape in which to express the voice of the hybrid, taking what one wishes to persist about the culture of origin in a new space of arrival, while healing from the aftermath of negative valences of migratory displacement. While this is constant for all immigrants, throughout history and across the world, in Canada it can achieve multiple resonances within the framework of its own culture, such as within an anglophone or francophone political inheritances (Spin, for example, resides in Quebec), and of Canadian multicultural definitions. This is then, in turn, placed in relation to what a cultural fusion is inherited and meant by in the Latin American historical, cultural and social contexts.

For example, Lady Vanessa laments feeling like a 'foreigner' in both Canada and Colombia (2020). However, she expresses her gratitude for existing between worlds that have allowed her to explore her heritage, question her identity, and find an artistic community in both places:

It's interesting that throughout my career, I've found it to be a responsibility to speak about Latinx identities, about gender roles in Latinx identities, even socio-political and the ways in which our community and 'latinidad' are known to be very problematic in racist, misogynistic ways. I also like to be hyper-aware of the Western context that I carry when speaking about those things. (2020)

The role of gender is placed in relation to the cultural affiliation, as both bear markers of their own to the creation of her identity. Overarching simplifications of the Latinx identities also do not offer a facile identification. How to capture being "latino/a", therefore, in this regard?

Néstor Canclini (2004) explains the phenomenon of the hybrid that is the basis of Latin American identity. This plural identity spans various continents of the America's; it links by language and common colonial experiences. Canclini's work attempts to provide a theoretical context on interculturality and hybridization to reformulate the question of "latin-ness" or of the "latino" (itself a diasporic denomination, necessitated by the experience of difference in a dominantly non-Romance-language-based linguistic context, and now evaluated from the perspective of the "latino/a"). Clancini asserts that "latinidad" cannot be considered in isolation; rather, he posits that the "Latin American" has always been a hybrid construction, "a confluence of contributions from the Mediterranean countries of Europe, the indigenous American and African migrations. These fusions that constitute what is Latin American are now expanded in their interaction with the Anglo due to the voluminous presence of Latin migrants and cultural products in the United States. Beyond this, what is "latino" interacts and also remodels itself in a dialogue with cultures in Europe and even in Asia" (2004, p. 1). Works by Latin Canadian writers can be seen to deconstruct language assumptions and stereotypical associations of identity.

By designating his work as "Latino" Spin reflects his desire to make this stance evident. By using mainly English, rather than Spanish, for his performances, he reaffirms a specific choice. As Ramón H. Rivera-Servera explains:

This shift to performance and latinidad also avoids the settler-colonialist assumptions behind the privileging of Spanish or Hispanic as the primary unifying feature of Latin American-descent populations by extending the repertoires of cultural practice to Latina/o studies beyond those centered on linguistic genealogies, especially writing, and moving beyond Spanish European heritage and colonial history into an engagement with the plurality of the region and its traveled histories, including African, Asian, and Indigenous routes and communities. (2017, 152)

Spin's insistence on clarifying his distancing from the Hispanic, and the variations of rap, spoken word, slam, and work with indigenous youth, testify to this main tenet of his work. He also incorporates indigenous languages. According to Rivera-Servera, Latinx expressions such as Spin's cause a shift, a critical performative feat in and one

itself, also anchored an increasingly comparative and inter-Latina/o focus for Latina/o studies, which, while maintaining the significant legacy and current value of the varying ethno-national specificities within Latina/o culture (Cuban, Puetro Rican, Mexican, Dominican, and so on), sought to understand the promises and frictions of constituting an amalgamated ethno-racial category within the national and international spheres. Performance offers an object of study and an analytic for understanding *latinidad*. (152)

The project's main challenge is theoretical: to elaborate and expand the concept of third space. This stems from analyzing Latino-Canadian writings in concert with mapping of cultural exchanges in the country. This is needed to understand fully how these writings reflect and impact the notion of local/national identity in Canada as a 'fourth space.' Close readings reveal cross-themes of perceptions of multicultural, multiethnic and translingual identity constructions.

Results

In relation to space and Hispanic digital poetry, the emergence of a new imaginary of digital forms and communities in contact blend with inherited cultural values. In their study on digital visual art, John Hess and Patricia Zimmermann discuss that: "In digital work, history and the future can morph together, assembling a new imaginary construct that repairs this fracturing of space and time but does not fully restore it to its previous, analog configurations" (p. 182). On the other hand, the imaginaries that can connect across time and space must be rooted in an individual lived and shared experience. Those dimensions—rooted in embodied presence, voice and kinetic qualities—are the other half of the story. As Ken Hillis notes: "the real and embodied places of the world—and their synthesis of meaning, nature, and social relations—are central to grounding self-identity and organizing sociocultural practices in a coherent fashion" (p. 201). The bridging of these aspects is reflected in the artistic practices of the Latinx e-works. In Faluótico's and Spin there is a direct relation to space, identity and culture. For Lady Vanessa the emphasis is on the effects of displacement evident in linguistic tensions for speaking a "grammatically correct" Spanish (2020).

To illustrate, we take a look at Faluótico's "Blues del inmigrante" [Immigrant Blues] and Spin's Guatemalan rap duet with Indigenous musician called "Tz'ij: Cosmovisión Maya". Each fuses sounds from their original cultural heritage and makes it contemporary in dialogue with a new geopolitical position. Lady Vanessa's incurrence into performance reflects a shift away from the written toward oral transmissions of poetry. For the purposes of this article we will focus mainly on the first two poets, and subsequent publications will delve into Lady Vanessa's work in greater detail.

Figure 1: Espejo/Reflejo [Mirror/Reflection]
Source: Faluótico (2018), *Poesía Multidimensional*

In Faluótico's poem "Blues del immigrante" a large eye alludes to the Uruguayan flag through its chromatic metonymy in sunny yellow, celeste and tan, set against a deep sea blue reminiscent of the Atlantic Ocean coastline of that River Plate country. The subject is "able to see at last / that things are the way they are / reflection [or I reflect] in the mirror of the present / reflection in the present of the mirror." The final verses focus on the looking in the mirror and affirming "there I am," while later this sense locatedness evaporates: "and when I realize that / I am no longer there." The disconnect from the body belies the outsider stance of the new immigrant. To deal with the immigrant experience and grappling of being between two spaces, Faluótico recommends embracing the process:

being Uruguayan is not a hindrance or advantage—it is just who I am. But we must also accept that we are also Canadian that we are part of another culture that can benefit from my experience as Uruguayan. That is something that I tackled in my book *ESPEJO/REFLEJO Blues del Inmigrante*. Do not deny who you are by becoming someone else…do not also stay as you were denying you the chance to change and advance, grow. Take the best of both worlds. The process of thesis/antithesis/synthesis works very well as a way of describing the process of becoming. Don't just stay Uruguayan—-translate yourself into Canadian (interview, May 2020)

To transcend feeling blurred by betweenness, the individual attempts to rearrange affiliations in a new way. The sense of loss of identity evident in "Blues del inmigrante" is expressed in the eye that sees but does so incorporeally. It witnesses, yet is disconnected from the body, which belies the outsider stance of a new immigrant. The blue of the background anchors and amplifies the allusion to the musical blues of the title that the voice laments but does so creating anew.

The ways that the migratory experience can be expressed through cyberspace and in various types of media, have a direct bearing on these creative productions. As Sara Wiederkehr González affirms in her study on migration, political art and digitalization: "Cyberspace has a direct influence on migration and the formations of communities in diaspora, as well as the direct relation of building and strengthening of the imagined community in a transnational context." (2017, p. 215). Furthermore, the ways that cultural resonances are translated into digital spaces merges what we have been discussing in a sense of play, embodiment, and connection across geopolitical spaces that transcend national or supranational boundaries in attempts to rearrange these at the will of the individual voices and/or their closest affiliations.

The e-poem is, thus, not stable in its scripted form, but rather a point of departure or springboard for a mobile experience towards meaning. For example, Faluótico's poem "Es un círculo el tiempo" [Time is a circle], presents a page/screen cast as a tornado of verses in four versions, whereby variations of the same words are rearranged in different order and in variously hued fonts.
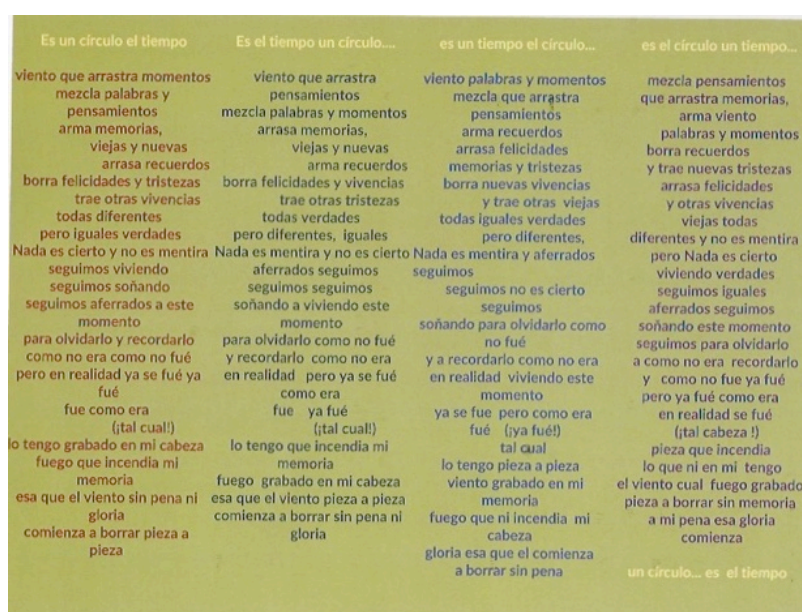
Figure 2: En un círculo el tiempo [Time is a Circle]
Source: Faluótico (2019), *Poesía multidimensional*

The title of each of the four iterations shifts the components slightly: i. "Es un círculo el tiempo" [Time is a circle]; ii. "Es el tiempo un círculo [which is the same translated into English though in Spanish a different syntax from the first is possible]; iii. "es un tiempo el círculo" [the circle is a time]; and iv. "Es el círculo un tiempo" [different syntax in Spanish, but with the same meaning in English as iii.] These iterations also make evident the challenges of translation and transposing word play from one language to another. By effect, this also reflects what can be 'lost in translation' to one's identity when one cannot express the same nuances in a newly acquired second language.

Another example is found in a different way in Faluótico's poem "Thoughts, Birds and Woes." Here we see two citrus tones of deep mustard yellow words interwoven with others in a burnt orange tinge that depict words which seem to 'fly' across the page.

Figure 3: Pensamientos, pájaros y penas [Birds and Woes]
Source: Faluótico (2019), *Poesía multidimensional*

The variations in font sizes create the illusion of distance and proximity, much the same as a painter would create a sense of perspective using variations in hue and shapes. The title itself is possible to read in two ways, placing the word "woes" first, and reading backwards from "birds" to "thoughts", or vice versa. And it is interesting to note that the final verse, placed moderately in linear reading sequence, at the end of the poem, rearranges these same three words: "birds, thoughts and woes" (vv. 17-19). They appear in descending order towards the right side of the page, whereas the first of the title seem to 'fly' up to the right, depending on how one perceives the text. These outlying verses form two wings at the top and bottom on the page. Mirroring this is the dual tonality of the text, in various spacings and with some larger sized font than the rest. The content refers to birds that appear and disappear in sight of the poetic voice, and tells of a collective group of birds that at once merge into one large bird entity, thus, one word-object: "comounsolopájaro" [asonebird], the combination of words becoming a single unit. When they disperse ["se dispersan"] in verse five, the font expands in concert with the meaning, to visually reinforce the effect.

There is a rhythmic quality to the displacement of words on the page/screen here, too. This ties in with Faluótico's work as a musician. Hence the rapprochement between literature and other forms belonging to popular or oral literature (De Campos p. 281), of "hybrid genres" that De Campos defines as "autobiographies, letters, reports, brochures" (p. 281) and "the products from popular culture that exist on the periphery of literature, journalism, vaudeville, gypsy song and police history" (p. 281), explain such e-poetic innovations also at work today as a voice of hybridity in Latin American identity. Beyond neologisms such as Faluótico's ("asonebird"), the sound elements express a new space of identity that is interactive, placed among repeating texts, that fuse times before/after/now, and thereby create a 'fourth' dimension that is hidden until spoken, performed and meditated upon through synaethesia.

The percussive elements inform the apparently nonsensical drive that the poet lets erupt on the page. The performance of reciting a poem liberates the logical sense of the meaning to open to greater psychological depth, as does the creative design of poem as graphic art. This has evolved in the 21st century with the synthesis of these attributes on the lit screen. Faluótico comments on this in his interview with us:

I call my work Multidimensional Poetry and the slogan I use is: Poetry to read, see and hear. Colour is essential to it. Colours allow me to, first, create an emotional state where they can experience the poem with another disposition. They also invite the reader to play with the many possible readings highlighted by the colours and in that way find poems hidden inside the overall poem. That can be done in a digital medium that will contemplate not only those publishing possibilities but also that the poem can be easily shared and easily retrieved. This also allows me to add music to them if, for example, I put together a video, let's say the *POSTCARDS FROM WARD'S ISLAND* series then I am truly able of creating a poetry that someone can read, hear, or just be or just allow the music to take them to another level. Poetry can also be expressed without words through rhythms and sounds that can create an aural picture and generate a mood that allows the listener to recreate a moment that those sounds put together. So music is also essential to what I do. The digital medium allows to mix all those elements into one poem. (May 2020)

Faluótico makes clear the creative process in letting language play lead the meaning and to be amplified with sound. This allows for freedom at the textual level of creation, but also signifies a release of 'outer' strictures that would censure or limit the expression of subjectivity in a mother tongue or a newly acquired language. In the work of a poem that amplifies its referential system to the play on sounds and printed letters and/or words, these create new spaces of meaning.

Memory plays a key role in pluralizing the sense of self, and this must be reconciled with the location of the subject vis-à-vis the body. If poetry is a metalanguage in constant movement—against the former stasis and towards a new, ever-expanding sense production—then for Faluótico and Spin it is created by juxtaposing words, sounds and their associations whereby the past and present collide.

The reassessment of the status of "Immigrant Indigenous Friendships" in the collective video poem, which Spin organized with his organization One Mic Educators, tackles the traditional and historical injustices and the resulting traumas. The juxtaposition of various cultures are poignant in the collective poetry recitations that speak of family, massacres, tribal bloodshed, aggressions against equity, and the "constant pressure to explain the skin I'm in,… constant battles to explain the skin I'm in" (2018). The 'fear of the truth' and the prevalence of lies that the poetic voices in the video poem associate with the 'Canadian' is put in the focus that make the uncomfortable truth hard to ignore. Indigenous historicities intersect to remind listeners there is much work to be done to undo the effects of traumas caused by the past collective transgressions. Far from being simply a forum to air grievances, however, the artform is proposed as a way through to another solution: hearing, understanding and creating a different future, one that inhabits a fuller, filter-free zone of truth-telling, mutual respect and authenticity.

The terms of performance in designating Spin's work as "Latina/o" reflects his desire to make evident this stance. Instead, his usage of English language mainly for his video poems, spoken word performances, and other recordings, and the careful attention to terminology of naming reflect what Ramón H. Rivera-Servera has termed in his research on Latin American descent populations:

This shift to performance and *latinidad* also avoids the settler-colonialist assumptions behind the privileging of Spanish or Hispanic as the primary unifying feature of Latin American-descent populations by extending the repertoires of cultural practice toLatina/o studies beyond those centered on linguistic genealogies, especially writing, and moving beyond Spanish European heritage and colonial history into an engagement with the plurality of the region and its traveled histories, including African, Asian, and Indigenous routes and communities. (2017, p. 152)

Spin's insistence on clarifying his distancing from the Hispanic, and the variations of rap, spoken word, slam, and work with indigenous youth, testify to this main tenet of his work and vision. As Rivera-Servera writes when describing Latinx expressions such as Spin's: "this shift, a critical performative feat in and one itself, also anchored an increasingly comparative and inter-Latina/o focus for Latina/o studies, which, while maintaining the significant legacy and current value of the varying ethno-national specificities within Latina/o culture (Cuban, Puerto Rican, Mexican, Dominican, [Uruguayan, Chilean, Argentinian, Ecuadorian,] and so on), sought to understand the promises and frictions of constituting an amalgamated ethno-racial category within the national and international spheres. Performance offers an object of study and an analytic for understanding latinidad" (p. 152).

Figure 4: One Mic Educators Logo
Source: Spin El Poeta (2020)

In Spin's spoken word poetry and video art, words lean into the body's conscious awareness physicality; the subject takes a self-aware stance before what it aims to decipher in relation to a political position as communicative agency. The ambiguous social protest against a colonial past, links and channels a personal affiliation with lost time and disconnection to a cultural history that figures first as a working through the loss of the father ("Spin Youth Transitions" 2012), in search of connection to truth and self-affirmation ("6ix in the 6ix" 2019), and second, to an affirmation of the strength of the mother (see for example his spoken work performance of "My Mama Raised Me Proper") and a recuperation of power against a repressive system of discrimination from external forces.

The videos of slam events, musical poems, and community projects exhibited on Spin El Poeta's company website One Mic Educators, house a unified collage of art as

activism. There is a therapeutic dimension that figures in Spin's approach, particularly in support for those who feel disadvantaged or underrepresented in Canadian society. The cathartic and restorative qualities to the act of spoken word poetry has been studied by researchers such as Alvarez and Mearns (2014) who identity psychological benefits that reassure the subject by having a forum of communication, internal drive and for achieving balance in everyday life. In Faluótico's voice the fusion of the past and present serve as a catalyst to remake the past as sound symbols in the present, pointing to a disintegration of a normative stance before language and the binary codes of then and now. His drumming performances merge with his recitation and graphic calligram poems to create multilayered works that are in continual transformation. The change is not an unstable flux, but rather a sense of sedimentation of layers of new insights that flow one from another.

Conclusions

These e-poetries reflect and impact the conception of literature and the notion of local/national identity vis-à-vis global digital media. Memory, nostalgia, contestation of stable definitions of "Canadian" —these connections or discontinuities are placed in high relief. Presence and the voice of the poet are inherent to both poets' creative articulations. Social media and internet platforms allow these to reach audiences across spaces and leave the confines of the book or of print. Yet the word's plural symbolism must return to the body's grounded state. Through its extensions, via cyberspaces and multiplied resonances in videos viewed by others and its multifold performative spaces online and recorded live, these e-poetries can extend their reach. Whether it can resist this and remain in a dynamic flow, is the caveat we glimpse in the poetic perspectives observed. Their resistance finds support in performance, online texts and video formats infused with the lightning scope of the internet and its extensions.

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Analyzing the Source of Wealth of Mr. Suckling and Mrs. Elton in Jane Austen's Emma

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Abstract

In this paper, I discuss the source of wealth of Mr. Suckling and Mrs. Elton in *Emma* (1815) by focusing on the campaign against the slave trade in Britain and the implications of their origin, family name, and estate. Mr. Suckling is a shadowy minor character whose history is hardly mentioned. However, his origin, family name, and estate may provide a hint to help the readers understand his characterization. He is from Bristol, which was the center of the British triangular trade with the colonies, and his wife and sister-in-law Mrs. Elton are from Bristol as well. *Emma* was written in the aftermath of the 1807 abolition of the slave trade. The Sucklings' strong connection with Bristol implies that their family business involved the slave trade. Moreover, Mr. Suckling's family name and estate—Suckling and Maple Grove—hint sugar, one of the primary products that Britain traded with the colonies. The family name "Suckling" can be easily associated with the words "sucking" and/or "coerced." Both of Mrs. Elton's maiden and married names imply the slave trade, too. Mr. Suckling's and Mrs. Elton's fashioning themselves as a gentlemen and gentlewoman from a good family represents Austen's awareness of the social mobility by which the new rich are accepted by their social betters.

Keywords: Austen, Bristol, New Money, Slave Trade, Slavery, Social Mobility, Thomas Clarkson

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Introduction

In this paper, I discuss the source of wealth of Mr. Suckling and Mrs. Elton in *Emma* (1815) by focusing on the campaign against the slave trade in Britain and the implications of their origin, family name, and estate. Mr. Suckling is a shadowy minor character whose history is hardly mentioned. However, together with the case of Mrs. Elton, hints that his wealth comes from slave trade are provided. Jane Fairfax's allusion to the slave trade by the terms "offices for the sale" and "the human flesh" and Mrs. Elton's sudden assurance that "Mr. Suckling was always rather a friend to the abolition" in Vol. 2, Ch.17 in *Emma* reveal Austen's interest in the abolition of the slave trade, a significant political issue in her lifetime, and her dislike of the new rich who benefited from trading in human beings. Focusing the history of the anti-slave trade campaign in Britain, I would like to analyze the changes that occurred in the British class society of Austen's lifetime and the art of Austen's criticism and satire.

Austen's interest in British imperialism and the campaign against the slave trade

Irene Collins writes that at the end of the eighteenth century, the educated British public had an interest in all matters related to the British navy and colonies (14). Following this suggestion, I would like to clarify the extent of Austen's concern for British imperialism and the issues of the slave trade. On January 24, 1813, she wrote to her sister Cassandra as follows: "We quite run over with Books. *she* [*sic*, Mrs. Austen] has got Sir John Carr's Travels in Spain from Miss B. & *I* am reading a Society-Octavo, an Essay on the Military Police & Institutions of the British Empire, by Capt. Pasley of the Engineers, a book which I protested against at first, but which upon trial I find delightfully written & highly entertaining. I am as much in love with the Author as I ever was with Clarkson or Buchanan, or even the two Mr Smiths of the city. The first soldier I ever sighed for; but he does write with extraordinary force & spirit."

In this short passage, three persons were mentioned who were greatly concerned with British imperialism and the slave trade. Pasley was Charles Pasley (1780–1861), who was an expert in artillery and sieges. He argued that after the independence of America, Britain should make the best use of its colonies to send soldiers and sailors to fight overseas and expand its territory. His *Essay on the Military Policy and Institutions of the British Empire* was published in 1810 and went through four impressions by 1812, earning a good reputation. Clarkson refers to Thomas Clarkson (1760–1846), a leading campaigner against the slave trade, while Buchanan was Claudius Buchanan (1766–1815), a theologian who contributed to the spread of Christianity in India. It is evident that Austen had great interest in the expansion and dark side of the British colonies.

To understand the background of Jane Fairfax's allusion to the slave trade in *Emma*, we should pay attention among these three to Clarkson. Clarkson was born in 1760 in Wisbech, Cambridgeshire. His father was a priest of the Church of England and master of Wisbech Grammar School. He studied math at St John's College, Cambridge, and received his BA in 1783. He then continued his studies at Cambridge to enter the Church of England. In 1785 he applied for a Latin essay competition at the university with the paper entitled "Anne liceat invitos in servitutem dare?" (Is it right to enslave men against their will?), and won the first prize (Gifford 7, Takei 192–93). After being translated into English, the essay was published as *An Essay of the Slavery and Commerce of the Human Species, Particularly the African* in 1786. Thereafter, for

the rest of his life he engaged in the campaign for the abolition of the slave trade between Britain and the African Continent.

This book immediately gained a good reputation that brought Clarkson into contact with others involved in the anti-slave trade campaign, such as Granville Sharp (1735–1813) and William Wilberforce (1759–1833). In May 1787, the Committee for Abolition of the African Slave Trade was founded, which Clarkson joined. Thereafter Clarkson was in charge of collecting testimony from ex-sailors in slave ships and confiscating handcuffs and fetters used to torture slaves. From 1787 to 1794, he travelled around England, 35,000 miles in total. He frequented Liverpool and Bristol because these towns were major ports for the slave trade. His activity was exhausting and dangerous. I would like to introduce a few examples from his writing. In Liverpool, after receiving a blackmail letter, he was attacked in the harbor and nearly drowned (Clarkson 1:204–05). In Bristol, a slave merchant bribed witnesses on Clarkson's side, who were then sent to the sea (Clarkson 1:213). When he travelled for sixty miles to meet a surgeon who had highly esteemed Clarkson's campaigns at first, the surgeon suddenly refused to testify for Clarkson from fear of losing the favor of wealthy patients returned from the colonies (Clarkson 2:20). Despite all the enthusiasm and contributions of the campaigners, the slave trade continued because the MPs included gentry with estates in the colonies and merchants who made fortunes from the slave trade (Morgan, *Bristol* 132, Morgan, *Slavery* 54, Sherwood and Sherwood 28, 74). The Abolition Bill was declined in Parliament in 1804 and 1805, and finally passed in 1807. Clarkson's achievement and contribution were applauded by William Wordsworth, who wrote the poem "To Thomas Clarkson" (1807). Austen would have read this poem.

The implication of the family name and estate of Mr. Suckling

Emma was published in December 1815, and the story is set in 1813–14 (Moody), exactly the period when Austen was writing this novel. As stated above, in 1807 the slave trade was outlawed in Britain. Slave ships were forbidden to depart from the colonies, and in 1808, slaves were refused entry to Britain. However, patrolling was carried out in very limited fashion and penalties were quite low (Southam 13). The illegal slave trade continued by camouflaging the nationality of the ships or forging a certificate for the sale of a ship (Sherwood and Sherwood 38, 72, 74). Sugar cane, coffee, and tobacco grown in the colonies sold dearly in Britain and the slave trade was a profitable business, a goldmine for Britons. Laws and penalties were nothing in light of the high returns.

Considering this historical background, the dialogue of Jane Fairfax and Mrs. Elton on the slave trade in Vol 2, Chapter 17, may be read as Jane's hinting at her suspicion that the Sucklings rose through the slave trade and that the present Mr. Suckling was involved in the illegal slave trade. Just before this dialogue, she is annoyed at Mrs. Elton's advice to seek the job of a governess in any family in Mrs. Elton's circle. She refuses Mrs. Elton's help and counterattacks with the following remark: "There are places in town, offices, where inquiry would soon produce something—Offices for the sale—not quite of human flesh—but of human intellect" (325). Mrs. Elton replies, "Oh! my dear, human flesh! You quite shock me; if you mean a fling at the slave-trade, I assure you Mr. Suckling was *always rather* a friend to the abolition" (325, italics mine). Her reply reflects the fact that because of the influence of the Dissenters, by the 1780s celebrities in Bristol were increasingly aware of the inhumanity and immorality of this

trade; Bristol was the first English provincial town to set up a committee opposing the slave trade, and Bristolians were divided for and against the slave trade (Morgan, *Bristol* 150). Mrs. Elton's astonishment and sudden jump to the slave trade and the term "always rather" suggest that the Sucklings feigned abolitionist sentiments after they had gained enough money to purchase a country estate―Maple Grove.

Obviously, Mrs. Elton is agitated by Jane's allusion to the slave trade, and makes a slip of the tongue about the fact that they are upstarts. In her habitual praise of Mr. Suckling's wealth and his estate Maple Grove, she passionately attacks a new family who recently moved from Birmingham to the neighborhood of Maple Grove:

I have quite a horror of upstarts. Maple Grove has given me a thorough disgust to people of that sort; for there is a family in that neighbourhood who are such an annoyance to my brother and sister from the airs they give themselves! Your description of Mrs. Churchill made me think of them directly. People of the name of Tupman, very lately settled there, and encumbered with many low connections, but giving themselves immense airs, and expecting to be on a footing with the old established families. A year and a half is the very utmost that they can have lived at West Hall; and how they got their fortune nobody knows. They came from Birmingham, which is not a place to promise much, you know, Mr. Weston. One has not great hopes from Birmingham. I always say there is something direful in the sound: but nothing more is positively known of the Tupmans, though a good many things I assure you are suspected; and yet by their manners they evidently think themselves equal even to my brother, Mr. Suckling, who happens to be one of their nearest neighbours. It is infinitely too bad. Mr. Suckling, who has been eleven years a resident at Maple Grove, and whose father had it before him―I believe, at least―I am almost sure that old Mr. Suckling had completed the purchase before his death. (335–36)

She is so upset that she confesses that Mr. Suckling has been living in Maple Grove for only eleven years and the late Mr. Suckling bought the estate just before his death. She usually boasts of her connection with good families and the elegance and luxury of Maple Grove. However, the Sucklings are indeed upstarts who have continued for just two generations. They recently managed to rise socially with new money earned by trade, and it was not long before that their family estate was purchased. This scene typifies Austen's satire because an upstart ridicule another upstart and reveals she is also an upstart.

In addition to Mrs. Elton's blunder, the names Suckling and Maple Grove imply that the Sucklings engaged in the slave trade. Deirdre Le Faye states that Maple Grove was modelled on the village of Clifton to the northwest of Bristol (*World* 271). In this village, wealthy slave traders and planters returning from the West Indies settled after their retirement. Several houses built there remain today whose locations have been identified by Rachel Lang, a researcher from the Centre for the Study of the Legacies of British Slave-Ownership at University College London (Smith). Maple Grove might be a product of the slave trade.

Moreover, the names Suckling and Maple Grove hint at *sucre* (meaning sugar in French) and maple sugar. Sugar was one of the primary products that Britain traded with the colonies and played a significant role in Bristol's prosperity in the eighteenth century (Morgan, *Bristol* 184–88). James Walvin notes, Bristol "was home to groups of

prosperous sugar merchants." Bristol thrived thanks to slavery and sugar trade (see the photos 1-2 below), and the Sucklings likely benefited from slaves and sugar. The family name "Suckling" can be easily associated with "sucking" and "coerced." The family business of the Sucklings would then be sugar trade with the colonies, and their fortune might have been made by coercing "human flesh" ―slaves.

Photo 1. No 7 Great George Street, Bristol was the home of John Pinney (1740–1818), now Georgian House Museum. Pinney owned a sugar plantation in the island of Nevis, West Indies. Photo by Akiko TAKEI.

Photo 2. Hotel du Vin, Bristol. This hotel was Lewin's Mead Sugar House (1714–1837). Photo by Akiko TAKEI.

New money comes to Highbury

Jane escapes inclusion in Mrs. Elton's circle because the obstacle to her marrying Frank Churchill is solved by Mrs. Churchill's sudden death, after which she no longer needs Mrs. Elton's unwanted patronage. However, the heroine Emma Woodhouse must still welcome Mrs. Elton as a new resident of Highbury and maintain harmony with her.

Social standing based upon family connections and wealth is maintained quite well in Highbury, where the Woodhouses are located on the top of social ladder. They belong to gentry that had continued for several generations and are the richest in Highbury. Therefore, before actually meeting Mrs. Elton, Emma already despises her as an upstart with bad upbringing.

This passage is the first example where Emma guesses who Mrs. Elton is:

Of the lady, individually, Emma thought very little. She was good enough for Mr. Elton, no doubt; accomplished enough for Highbury—handsome enough—to look plain, probably, by Harriet's side. As to connection, there Emma was perfectly easy; persuaded, that after all his own vaunted claims and disdain of Harriet, he had done nothing. On that article, truth seemed attainable. *What* she was, must be uncertain; but *who* she was, might be found out; and setting aside the 10,000l. it did not appear that she was at all Harriet's superior. She brought no name, no blood, no alliance. Miss Hawkins was the youngest of the two daughters of a Bristol—merchant, of course, he must be called; but, as the whole of the profits of his mercantile life appeared so very moderate, it was not unfair to guess the dignity of his line of trade had been very moderate also. Part of every winter she had been used to spend in Bath; but Bristol was her home, the very heart of Bristol; for though the father and mother had died some years ago, an uncle remained—in the law line—nothing more distinctly honourable was hazarded of him, than that he was in the law line; and with him the daughter had lived. Emma guessed him to be the drudge of some attorney, and too stupid to rise. And all the grandeur of the connection seemed dependent on the elder sister, who was *very well married*, to a gentleman in a *great way*, near Bristol, who kept two carriages! That was the wind-up of the history; that was the glory of Miss Hawkins. (196–97)

Mary DeForest argues, "the emphasis on Bristol for four times in the short passage, particularly the angry satisfaction with which Bristol is substituted for Bath, implies that Bristol had unsavory connections." Bristol was the first city in Britain to develop the slave trade; between the 1730s and the early 1740s, this town was a leading port for the slave trade (Morgan, *Bristol* 132–33, Sherwood and Sherwood 80, Giles). Clarkson wrote of his first impression of Bristol as follows: "I found that people talked very openly on the subject of the Slave-trade. They seemed to be well acquainted with the various circumstances belonging to it. There were facts, in short, in every body's mouth, concerning it; and every body seemed to execrate it though no one thought of its abolition" (1:151). It is unsurprising that Emma instantly conceives a prejudice against Mrs. Elton's upbringing.

As well as Mr. Suckling, both Mrs. Elton's maiden and married names imply her connection with the slave trade. Her maiden name Hawkins corresponds to John Hawkins (1532–95), the pioneer of the slave trade in the Elizabethan era (DeForest, Sherwood and Sherwood 16–17). Her married name Elton might come from the Elton

family in Bristol (Le Faye, "Bristol" 191). The Eltons succeeded in the grass business and pottery, converted to the slave trade, and settled in Cliffton. By 1750, they owned eight slave ships in total, including one named *The Elton*. The name Elton remains in Bristol as Elton Road running from Salthouse Park to the town center in Clevedon (Cork). As shown by Mrs. Elton's elder sister's marriage with Mr. Suckling, who also comes from Bristol, as already mentioned, a circle of slave traders and planters returned from the colonies is supposed to have formed in Bristol.

Emma tries to underestimate Mrs. Elton's fortune, but her dowry of 10,000 pounds a year is fairly good property (DeForest). Together with Mr. Elton's income, it is enough for her to maintain the lifestyle of the well-to-do. Mr. Hawkins's income is probably less than that of the Sucklings and he could not afford to buy a country estate. In any case, Mrs. Elton's fortune is far greater than Emma's estimation.

As soon as Mrs. Elton comes to Highbury, Emma's initial dislike of her increases. For instance, Emma is angry at Mrs. Elton's comparison of Maple Grove with Emma's estate Hartfield and boast of a fashionable barouche landau because her pride in the inherited estate and fortune for generations is injured. In social mixings in Highbury, Mrs. Elton is respected much more than Emma because she is a newly-wed woman. When the ball is started by Mr. Weston and Mrs. Elton, Emma, who usually enjoys being unmarried, is so irritated with having to "stand second to Mrs. Elton" (352) as to think of marriage. In addition to her standing as a married woman, Mrs. Elton owns much that Emma does not, such as opportunities for holidaying, friends of the same age, rides in a fashionable carriage, and an expensive pearl necklace. Because of their unique nature and glow different from those of other gem stones, pearls were highly valued; wearing pearls was a luxury limited to the privileged (Nagai 783). In nineteenth-century Europe, necklaces and earrings of large pearls were popular among royal families, and the growing middle classes likewise purchased pearls, especially small seed pearls (Landman 88, 90). In Austen's world, only Mrs. Elton is seen to be wearing pearls (Eleanor Tilney inherits a set of pearls from her mother, but she is not seen with them). Mrs. Elton is likely to have chosen as large a set as she could afford. As Gillian Ballinger and Carrie Wright note, Mrs. Elton wears and boasts of the pearls to display her wealth and overwhelm other women considered superior to her. Although Emma's social standing in Highbury is unchanged, whenever Emma meets Mrs. Elton, she cannot help recognizing the fearlessness and vitality peculiar to the new rich.

Conclusion

The descriptions of Mr. Suckling and Mrs. Elton, especially the emphases on their Bristol origin, portray the existence of those newly rich from colonial business without much criticism after the abolition of the slave trade. The narrator voices the abolitionists' disapproval through Jane's allusion to the slave trade and a good family's contempt for new money through Emma's dislike of Mrs. Elton. However, the British public, such as Highbury residents, was not perturbed by the evil of buying and selling human beings and welcomed the new rich and their money. Mr. Suckling's and Mrs. Elton's love for anything luxurious and fashionable is satirized, but their wealth was admired by those with lower incomes. Their settlement in the country estate demonstrates the flexibility and mobility by which they were accepted in the British upper-middle classes.

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From Gender Binary to Diversity:
The Image of the Prophet in Tony Kushner's Angels in America as a Stimulus to Discuss Gender Issues in Catholic Theology

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Abstract

A theatrical play *Angels in America. A Gay Fantasia on National Themes* by an American playwright Tony Kushner was broadcast in 60 countries and 2500 cinemas around the world at the National Theatre Live Edition in 2017. The main character, Prior Walter, who suffers from AIDS, is a young New Yorker and a gay. The aim of this paper is to present and discuss the original, non-canonical and non-traditional image of Walter as a prophet. Thus, the goal is to analyze the similarities and differences between the Biblical image of a prophet and the prophet from *Angels in America*. The author of the paper will attempt to determine what values these differences imply and whether they could offer a creative opportunity for theologians and other scholars dealing with cultural, theological, and social themes. The basic research hypothesis presupposes that the play is an inspiring way to learn about the theological questions of people in the second half of the 20th and at the beginning of the 21st century.

Keywords: Culture, Gender, Faith, Roman Catholic Church

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Introduction

A theatrical play *Angels in America. A Gay Fantasia on National Themes* by an American playwright Tony Kushner was written in two parts in 1991 and 1993. The work won numerous awards, one of the most important being the Pulitzer Prize for Drama in 1993 for Kushner's first part of the play *Angels in America: Millennium Approaches*. In 2003, American HBO showed the miniseries *Angels in America* directed by Mike Nichols. In 2017, the play was staged at the Royal National Theatre in London and broadcast in 60 countries and 2500 cinemas around the world at the NT Live Edition. One year later the play was presented at the Neil Simon Theatre on Broadway, New York City. The director of both plays from London and New York was Marianne Elliott.

Three and two years ago *Angels in America* provoked once again heated discussions on gender (e.g. Othman, 2014; Omer-Sherman, 2007, pp. 7-30; Frantzen, 2000), sociological and political (e.g. Bultel, 2018; Blazar, 2009, pp. 77-84; Omer-Sherman, 2007, pp. 7-30; Ard, 1996, pp. 91-96; Savran, 1995, pp. 207-227) issues presented in the play. One of the themes is the image of Prior Walter as a prophet. Tanner J. Underwood examines the play and the main character from the perspective of "magical realism," which is the literary inclusion of both realistic and fantastic elements or the unknown into the text. (Underwood, 2019, pp. 109-122). Yair Lipshitz and Anthony Lioi emphasize the Jewish religion and spirituality, particularly the traditions of biblical prophecy (Lipshitz, 2012, pp. 203-238; Lioi, 2004, p. 96). Claudia Barnett presents Prior Walter as sanctified by his proximity to death due to his suffering from AIDS. She interprets his illness as a metaphor of purgatory throughout the play (Barnett, 2010, pp. 471-494).

It is important to highlight that the issue of Prior Walter has not been thoroughly analyzed so far from the perspective of the Roman-Catholic theology on sexuality and gender. Thus the aim of this paper is to compare the image of the prophet in *Angels in America* to the classic, canonical image of a prophet in the Roman-Catholic theology to indicate and evaluate the position of non-heteronormative people in the Catholic Church. In this paper, I will shortly characterize Prior Walter and present the similarities between the image of the prophet from the Kushner's play and the Old and New Testament. Then I will point out the differences between the two images. Finally, I will focus on observations resulting from the differences in the context of gender issues in Catholic theology.

The method of analysis applied in the paper is theological hermeneutics of cultural texts. The notion of hermeneutics has a double genesis. The first, far-reaching origin results from the methodological proposals concerning the exegesis of the Bible as the text of the Revelation containing the word of God addressed to a man (Bartnik, 1999; Jeanrond, 1994). This type of hermeneutics also stems from the consent of the representatives of some religions to place the images of the Creator and the sphere of sacrum in the art. The aesthetic and didactic function of paintings was noticed, among others at the Council of Nice II (787) and the Council of Trent (1545-1563). The development of understanding the role of art appeared in theology among others as a result of the teachings of Pope Paul VI, the decisions of the Second Vatican Council (1962-1965) and the thought of John Paul II. They became the basis for more explicit opening of theological hermeneutics of cultural texts (Pasierb, 1983, pp. 296-304).

The Constitution on the Sacred Liturgy *Sacrosanctum Concilium* (no. 122-129) highlighted the specificity of art and the importance of its questions. The tradition of the existence of Christian iconography has been emphasized as well. Priests were advised to promote what is new and valuable in terms of artistic investments. The works of the sacred art latter were called signs and symbols of the highest matters, not just illustrations of the Bible. It was recognized that artistic creativity has a significant influence on the liturgy and the engagement of the faithful. Additionally, the Dogmatic Constitution on Divine Revelation *Dei Verbum*, (no. 4-16) recommends specific rules in the analysis of theological sources, such as the intellectual character of theological understanding, the relationship between the experience of faith and the hermeneutic process, the preservation of the historical awareness of the Church language, the understanding of the Word of God as embodied in the word of man, the development of the understanding of faith and theology to the fullness of God's righteousness. It appears that hermeneutics does not only function as an understanding between the Revelation and faith, but it also plays a significant role in the process of progressing from faith to understanding (Bartnik, 1999).

The second stimulus conducive to the development of analyzes within the theological hermeneutics of cultural texts was popular in the second half of the 20th century when intellectual trends, such as the analysis of form, symbol and sign, and the theory and practice of hermeneutics of visual arts and literary texts gained in importance (cf. Burke, 2012; Jeanrond, 1994). Hermeneutics signifies the methodology of reading and interpreting texts. In radical terms, it indicates the ontological contexts (the nature of being was considered to be interpretive, the existence of facts was rejected, only interpretation was approved) and existential (the understanding and interpretation were seen as the essence of being in the world). The postmodern methodological proposals reject the functioning of a rigid, closed and stable sense of the world or text as their "truth". As a new meaning, the "truth" and "essence" of being recognized became historical interpretations of the analyzed cultural text (cf. Zawadzki, 2015, pp. 103-115). Methodological issues in the field of philosophical hermeneutics were developed by Friedrich Schleiermacher, Wilhelm Dilthey, Martin Heidegger, Hans-Georg Gadamer, Jürgen Habermas, Paul Ricœur, Jacques Derrida, Michel Foucault, Gianni Vattim, John Caputo. Their theories influenced the development of hermeneutics practiced by theologians, eg. Karl Barth, Rudolf Bultmann, Hans Urs von Balthasar, Ernst Fuchs, Gerhard Ebeling. Gradually, a trend of research divided into formal categories of visual theology and audio theology was developed. Theatrical play can be interpreted in relation to both categories. Affecting the senses of seeing and hearing, it is one of the sources of theological hermeneutics of cultural works (Kawecki, Wojciechowski, Żukowska-Gardzińska, 2011).

Thus I will apply a method of theological hermeneutics of a literary text in my analysis of *Angel in America*. The method was described by Rev. Prof. Jerzy Szymik, a theological methodologist and a theologian of literature. He concluded that a careful interest of theology towards texts of fictional literature allows theologians to cognitively penetrate the complex mystery of human existence and the existence of the texts. It also serves to establish dialogue between culture and faith in the context of religious, ethical and anthropological issues (Szymik, Wuwer, 2008, p. 44). In addition, Szymik pointed out that the basic problem of this type of hermeneutics is to verify in a detailed analysis whether or not a theology is "in" and speaks up from the pages of the given literary work. The method consists of four steps: hearing,

understanding, discussing, and assessing/evaluating. Hearing has no appreciation of the form and the content of a given literary text. Understanding refers to individual elements of a given theologizing reflection in a literary, historical, political or, possibly, other contexts which are relevant to the work. In the next steps, the content should be discussed and evaluated from the theological perspective. Then, as J. Szymik observes, after these three steps, the theology of literature appears, as a place of encounter with literary theology (existing, rooted in and extracted from the text) and interpreting (contributed, creating a hermeneutic context). The researcher believes that the ultimate effect of his method would be to expand the beauty of theology. This would enrich the method with a broader form and content that would be closer to life thanks to the discovery of literary-theological novelty (Szymik, 2007, p. 129-160; Szymik, 1996, p. 39-40). The final conclusions on four methodological steps encourages to the reflection essential for modern theologians, namely what are the pastoral implications of theological hermeneutics. It appears that the analysis of "Angels in America" may lead to such conclusions which can influence the development of theological, literary and historical-cultural studies on gender issues.

1. Similarities between the prophet from *Angels in America* and the Biblical prophets

Before discussing the similarities between Biblical prophets and the protagonist of Kushner's play it seems vital to present briefly the prophet from *Angels in America*. Prior Walter is a young, over 30-year-old New Yorker who seems to be in control of his life. He is an atheist who comes from a Christian family of British origin back to the 13th century. According to Jean E. Howard, "with this lineage, he should be the 'unmarked' American inside, the one who belongs, the one not marked by ethnicity, race, or religion as marginal or eccentric. But Marked he is, both by his sexuality, we infer, means that the unbroken succession of Walters will cease with him, and marked by his disease, the wine-dark lesions that spread across his body" (Howard, 2012). Prior Walter stands out with his ironic sense of humour and elegant style. At the beginning of the play, Walter informs his partner, Louis Ironson that he suffers from AIDS. After some time Ironson leaves Walter. This events destroy Walter's world and crushes him as a human being. He loses his joy of life and becomes a wholly different person. Mentally, he gets dragged down into hell. According to Prior Walter, one of the signs of his appalling physical and mental condition is some kind of feeling of contact with supernatural sphere. As it turns out, the feeling is not a figment of his imagination. It is a real experience which initiates his dialog with an Angel and his role as a prophet. In the course of the play, Walter discovers his vocation and struggles with his mission. He tries to define his role in history and society. Finally, at the end of the play, he understands common and individual dimension of the prophecy he has to proclaim to other people.

It seems that Prior Walter experiences very dramatic happenings which transform his whole perception of life. And in this situation, he receives a prophecy. He is called to be a prophet and to some extent, he is similar to the prophets form the Holy Bible.

Prior Walter embodies several features inherent to the biblical image of the prophet. The overall image is based on the following characters from the Old Testament: the four Major Prophets (Isaiah, Jeremiah, Ezekiel, Daniel) and the Twelve who are also called the Minor Prophets (Hosea, Joel, Amos, Obadiah, Jonah, Micah, Nahum,

Habakkuk, Zephaniah, Haggai, Zechariah, and Malachi) (Pikor, 2012, p. 503-504). Firstly, Prior Walter's calling follows the same structure as that of the biblical prophets: 1) he is called to receive a prophecy given by an angel to the whole world; 2) he is resistant to this; 3) then, there are the signs about the supernatural assistance, for example, the Angel's voice and the open burning book apparition; 4) finally, there is one more sign which confirms the vocation; namely Walter's spiritual assumption and participation in Heaven.

Secondly, the prophet from *Angels in America* receives a message in the manner typical of biblical prophecy: audio, visual and audiovisual in a mystical way (Duda, 2012, p. 495). Walter gains ecstatic elation to which his body and psyche react. He is physically turned on. He feels embraced by a supernatural reality. From a certain point of view, he spontaneously submits to the inspiration. He starts preaching and he is both genuine and persuasive in his prophetic activity.

Thirdly, there is the word's content. What Walter gets may be defined as similar to the biblical prophecies (Pikor, 2012, pp. 501-506; Duda, 2012, pp. 494-496). The message comes from the supernatural world and is delivered by a being essentially higher than the man, i.e. an Angel. What is more, the news is intended for everybody as it relates to the present and to the future. It is a kind of advice about the life of individuals, societies and generally people around the world. The recipients of the message need a prophet to lead, guide, advise them, and to create a community. It should be noted that all of the features appear in the biblical cases of prophecy in the Old Testament.

Finally, Walter acquires a social position characteristic of biblical prophets in the Old and the New Testament, including Jesus Christ as a prophet (Pikor, 2012, pp. 501-506; Duda, 2012, pp. 494-496). Like them, he plays a peripheral or central role depending on his relationship with others. On the one hand, he feels lonely and lost. He belongs to a group of people suffering from AIDS who feel ostracized by some part of the American society of the 1980s. On the other hand, he represents a social group of young Americans who experience life in tough times. Just like the prophets from the Holy Bible, Walter becomes a symbolic voice of the oppressed (in the Kushner's play these are people suffering from AIDS). Prior embodies the conscience of political power. He makes certain moral demands on American Republican politicians and society and is a proclaimer of a new message. As an result, he becomes a *prophétes* (from the classical Greek: προφέτες) - the one who solemnly declares to people what he has received by inspiration, concerning future events, and in particular those that relate to the cause, the kingdom of God and to human salvation. Prior is a teacher who matured in his role and, a defender of social justice. His mission consists in communicating the mystery of a renewal.

However, apart from the similarities, there are several significant differences between Prior Walter's image and the prophets from the Old and New Testament.

2. Differences between the prophet from Tony Kushner's play and prophets of the Old and New Testament

Despite several similarities between the Biblical image of a prophet and the prophet from *Angels in America* certain differences should be emphasized. The main one is

that Prior Walter is a thirty-year-old New Yorker who is not a follower of any religion. He is gay and suffers from AIDS. These facts are the key features which define his non-canonical image as a prophet.

These differences imply several observations. Kushner seems to suggest that the prophet does not have to be a person living in Biblical times. He or she might live contemporarily in a city such as New York. Therefore, New York City may be interpreted as a symbol of any place of the Western civilization or even any place in the whole world. In other words, the prophecy is not a reality of the ancient history, but it may happen to anybody in any time. Thus a universal nature of prophecy is highlighted in the play by the presentation of Prior Walter's life and his relationship with the supernatural sphere.

Furthermore, Prior Walter's image accentuates the present position of non-heteronormative persons in theological and religious debates. Tony Kushner as a playwright suggests that the mission of a prophet may be given not only to a faithful, religious Catholic or a representative of other religion but also to any person. The mission can be offered to a man with non-heteronormative gender identity. Thus, Kushner's approach revises the position of LGBTQ persons in the teaching of the Roman Catholic Church. For ages the Church has been preaching that homosexual activities are sinful. It was especially articulated in the context of the sexual revolution of the 60s and 70s of the 20th century in western Europe and the United States and clearly manifested in Pope Paul VI's encyclical letter *Humanae vitae* from 1968 and John Paul II's *Veritatis splendor* from 1993. The reaction of these two popes to the sexual revolution of the second part of the 20th century was seen as a strong disapproval of any other sexual practices except for the ones between a man and a woman united in the sacrament of Matrimony. The view of John Paul II was further emphasized by a document *Homosexualitatis problema. Letter to the Bishops of the Catholic Church on the Pastoral Care of Homosexual Persons*, issued in Rome by the Congregation for the Doctrine of the Faith in 1986, signed, among others, by Cardinal Joseph Ratzinger (Pope Benedict XVI since 2013). The document signaled the necessity of offering care to homosexuals as part of expressing love to wrongdoers and the condemnation of sin. A moral estimation of sexual activity with another person than a spouse did not change in subsequent documents. *The Catechism of the Catholic Church* (first published in 1992) recommends treating non-heteronormative people with 'respect' and 'sensitivity'. Yet alongside these recommendations, it stresses that 'tendencies' of non-heteronormative people are 'objectively disordered'; what is more, a homosexual activity (just as a heterosexual activity outside marriage) – according to the current Church teaching – is thought to be a sin so that active homosexuals are not permitted to receive communion (*Catechism of the Catholic Church*, 1992, no 2358).

Pope Francis, in his apostolic exhortation *Amoris Laetitia* from 2016 teaches that "every person, regardless of sexual orientation, ought to be respected in his or her dignity and treated with consideration, while every sign of unjust discrimination is to be carefully avoided, particularly any form of aggression and violence" (Pope Francis, 2016, no. 250). The pontiff quotes a passage from *Catechism of the Catholic Church* (1992). There was also a note stating that "basing itself on Sacred Scripture, which presents homosexual acts as acts of grave depravity, tradition has always declared that 'homosexual acts are intrinsically disordered.' They are contrary to the natural law.

They close the sexual act to the gift of life. They do not proceed from a genuine affective and sexual complementarity. Under no circumstances can they be approved" (*Catechism of the Catholic Church*, 1992, no. 2357). "The number of men and women who have deep-seated homosexual tendencies is not negligible." (no. 2358). In the next point Pope Francis adds that "homosexual persons are called to chastity. By the virtues of self-mastery that teach them inner freedom, at times by the support of disinterested friendship, by prayer and sacramental grace, they can and should gradually and resolutely approach Christian perfection" (no. 2359). Pope Francis seems to emphasize the challenges and suffering homosexual people have to face and encourages all members of the Church to respect, sympathize and show sensitivity to them. He also condemns any form of discrimination towards them and calls them to "fulfill God's will in their lives" (no. 2358). Francis is clearly an advocate of inclusion, integration, pastoral care and accompanying spiritually the people experiencing their own gender identity (Wooden, 2016).

It should be noted that Francis' thought refers to the earlier Catholic documents. For example, during the pontificate of John Paul II published a document which asked "the bishops to support, with the means at their disposal, the development of appropriate forms of pastoral care for homosexual persons" (Congregation to the Doctrine of the Faith, 1986, no. 1). This letter, addressed to all the bishops of the Catholic Church, was entitled *On the Pastoral Care of Homosexual Persons*. It was signed by Cardinal Joseph Ratzinger at that time prefect of the Congregation for the Doctrine of the Faith. The letter gave instructions on how the clergy should deal with, and respond to, lesbian, gay, and bisexual people. There was a will to cooperate with the LGBTQ persons, but at the same time no change in the moral teaching was introduced. The document emphasized the following: "Although the particular inclination of the homosexual person is not a sin, it is a more or less strong tendency ordered toward an intrinsic moral evil; and thus the inclination itself must be seen as an objective disorder" (no. 3).

Thus, the Catholic pastoral magisterial thought on the LGBTQ people has been changed slightly but without any moral evaluation of non-heteronormative sexual activities. According to the teaching of the Church, among homosexuals there are always people who may need pastoral care and require some kind of spiritual assistance and guidance especially if they grew up in Catholic faith. In this context, it must be noted that Tony Kushner presents a completely different view in *Angels in America*. Prior Walter, the play's main protagonist, does not seem to be in need of pastoral care from any Church minister. He is an atheist who became a prophet-priest. As an individual he presents his teaching independently of any human or institutional Church's regulation. He offers the revealed content he has been given and this is the entirely new kind of relationship between a man with non-heteronormative gender identity and the Catholic Church.

Conclusions

In this paper, Prior Walter's image as a prophet was compared to a traditional representation of biblical prophets taking into account the similarities and differences between them. As it has been presented above, the image of a prophet from *Angels in America* offers a new vision of the status of the LGBTQ people towards the Catholic Church and her Magisterium. Based on the play, non-heteronormative persons are no

longer the people in need of pastoral care. With their deep life experience, they may become the messengers of a specific revelation; they teach and enrich society with their diversity. As it seems, the key to Prior Walter's action is his independence from any religious system or the Church. It may be concluded that he represents a holistic and humanistic view of a prophet which interacts with Kushner's artistic image of Angel, Heaven, and God.

As an individual Walter can be discussed in the context of the teaching of the Roman Catholic Church on gender. This debate implies an idea of some development in the Church's thought and practice. The appreciation of the rich and sometimes dramatic life experience of LGBTQ people may result in a reduction of ingrained heteronormativity in the Catholic Church as a religious institution. Consequently, the gender diversity will be able to be more supported by the religiosity which will less related to prejudice against sexual and gender minorities, and not support only gender or sex binary (cf. Toorn, Pliskin, Morgenroth 2020, p. 160-165). The discovery of this perspective of the LGBTQ people's interpretation seems to be a chance and a task for the institutional and hierarchical Church to gain a deeper recognition and understanding of the social and theological value of gender diversity in society.

Giving LGBTQ people a louder voice on their faith experience in the discussion on gender issues in the society and the Catholic Church, in particular, listening to that voice and understanding it by the clergy and laity may improve the situation of non-heteronormative persons in the Church and change the relationship between them and people of different gender identities for better. Subsequently, it will positively affect the promotion of equality in theology, widening the ecclesial community, social dialog, engaging faithful LGBTQ persons to participate in Church practices, policies, and ceremonies. It may be interpreted as realizing Pope Francis' postulate of inclusion and integration of people experiencing their own homosexual or other gender identity. As it was noted in an article *I'm Gay and I'm Catholic: Negotiating Two Complex Identities at a Catholic University* by Robbee Wedow, Landon Schnabel, Lindsey Wedow, Mary Ellen Konieczny "Reinterpretation among those who integrate gay and Catholic identities could be understood as informal "lived" theology being done in conjunction with, but also in distinction from more formal debates among professional theologians" (Wedow, Schnabel, Wedow, Konieczny, 2017, p. 290). Thus, these proposals of theory and practice in the Church do not have to be assessed as idealistic and utopian. In the paper *I'm Gay and I'm Catholic*, the above-mentioned researchers claim that an integrated non-heteronormative identity is possible in society or institutions such as a Catholic university (p. 298-303). The success of this assumption depends largely on the support of social groups in which LGBTQ people function. The attitude of society members may develop and open to gender diversity, e.g. thanks to the texts of symbolic culture, such as *Angels in America* by Tony Kushner. David Blazar proves it by using "performance pedagogy" to help students understand LGBTQ issues (Blazar, 2009, p. 77-84).

It appears that the original, non-canonical and non-traditional approach from a symbolic cultural text of *Angels in America* leads to several conclusions. The theatrical play could be a creative opportunity for theologians and other experts interested in cultural, gender and theological questions. It may be interpreted as an inspiring way to learn about the theological questions of people in the second half of the 20th and at the beginning of the 21st century. After all, culture can be legitimately

considered a theological source and a *locus theologicus* - a metaphorical place where theology takes its inspiration for researchers. They could be drawn to the pastoral potential of the play and to other cultural texts presenting a non-traditional and non-canonical theological point of view to get to know, understand, discuss, and answer the current individual and social theological issues.

Acknowledgements

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A Different Kind of Beauty: Wabi and Kintsugi

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Abstract

Symmetry and geometrical perfection are seldom seen in the natural world. The aesthetic concept of Wabi draws attention to the state of things "as they are" and appreciation of this natural state. It calls for the shift in one's mindset and highlights a different, perhaps, less conventional kind of beauty. This beauty has a lasting effect and is a process rather than a moment. One needs to stop, slow down and take their time to appreciate. Wabi constitutes the place of rest and calm rather than unattainable perfection. Wabi often refers to the realm of humans – all different and therefore able to fit together in a more cohesive way rather than in the perfect world, where strict proportions and rules are imposed. Kintsugi is the way to repair objects highlighting the repairs with gold, silver or red. It implies beauty despite repair, not because of it. While one cannot eliminate breakage itself once it has happened, one can build and rebuild beyond the accident. But probably most of all rebuild one's attitude and develop the appreciation of a different kind of beauty despite and beyond repairs. Accept repairs as part of this object and experience it in a different, more human way. This paper will focus on application of Wabi, Kintsugi and other Japanese aesthetic concepts as pedagogical methods beyond their immediate and traditional place in art.

Keywords: Aesthetics, Culture, Chanoyu, Mindfulness, Contemplation, Intercultural Studies

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Introduction

Aesthetics and appreciation of beauty not only permeate the whole of Japanese culture but also are the foundation of the Japanese national identity. There is a wide range of beauty and forms of its appreciation throughout Japanese cultural history. While they may be seen as uniquely Japanese, it doesn't mean that they cannot be appreciated, admired or accepted, learned and even recreated by the non-Japanese. Moreover, the globalization of Japanese approach to beauty and the beautiful lies not only in the introduction of forms, materials or specifically artistic approaches. It is the application of so called "Japanese beauty" to a much wider range of life and living that makes its aesthetic concepts so valuable for other cultures. I suggest that many Japanese aesthetic formats can be successfully applied to education, leadership, social skills and many other walks of life.

WABI

According to tradition, most aesthetic concepts are best introduced indirectly, through art, so they can be felt and experienced rather than understood. Two poems by Fujiwara Teika (1162-1241) are often used to describe wabi. One pictures a thatched-roofed hut on a seashore at dusk in autumn. The other describes the very first green shoots in spring peeping through the snow. Though the two images are completely different, they both invoke strong feelings of naturalness, the natural state of things. While there are many ways to age objects there is no way to make them look or be wabi, they simply have to be it.

Takeno Joo (1502-1555) established wabi as the term identifying as the essential spirit of Chanoyu ("The Way of Tea"), he also made Tea the medium of development of one of the aesthetic and intellectual ideals in Japanese culture. Instead or actually along with highly prized mostly Chinese utensils, ideals of wabi inspired simple, accessible natural utensils such as a wooden well bucket, green bamboo lid rest or unglazed pottery. Simple, austere type of beauty along with serene transcendental state of mind are at the foundation of what was later named wabicha or wabi style of Chanoyu started by Joo, continued by Sen Rikyū (1522-1591) and perfected by his grandson, Sen Sōtan (1578-1658).

Wabi as a method is supposed to inspire creativity and the development of the new ideas and ways. While the manner in the tearoom and the procedure for making tea is supposed to be traditional, creative thought and effort to bring immediacy and freshness to each gathering is what spirit of wabi brings. Denis Hirota writes: "This creative vision was, I think, associated in Joo's mind with the humility and sincere aspiration of the beginner and the amateur." (Hirota, 1980)

In the "The Broom Tree" record the accomplished amateur is termed "wabi sukisha" – "One devoted to tea in the spirit of wabi." (Hirota, 1980). While this person could not acquire Chinese utensils and could not become a connoisseur in the traditional sense, but instead is characterised as possessing "creativity" and would by necessity be inclined to develop new utensils. Earnestness and freedom from pretense are expressed in the letter on wabi as shojiki "open and straightforward" – the attitude considered to be crucial for the beginner in any discipline. It stands in particular against the mere mimicking the accomplished style of a master.

Many masters warn against imitating wabi. Unlike sabi, which is characterized by patina, and can be reproduced, wabi is an inherent quality and cannot be applied or cultivated.

Takeno Joo comments on cultivating "illuminating discernment" by unassuming appreciation of things. To Joo, the term "illuminating discernment" means the power to see and judge not only utensils but all things and encounters.

KINTSUGI

Kintsugi is a method of highlighting repairs of the utensils in gold rather than hiding them by only using invisible materials. Such repairs are made either in gold, silver (they will tarnish in time changing both colour and visual impact) or red or brown or black. Kintsugi is not an aesthetic concept and is widely misunderstood (just like wabi is) in the West today. So much so that there actually are kits of broken bowls and repair materials sold on the internet. In no way is the repair itself the goal of the process. It is the notion of appreciation of things as they are (just like wabi) despite their imperfection. While the whole idea of perfection and its view in Japanese aesthetics is a conversation for a different paper, I am using the term to identify the original form. Once the bowl is broken, it will always be a broken bowl. However, it doesn't downgrade its other qualities in the view of the Japanese. In Chanoyu repaired utensils are mostly used in the month of October, the month to with which the ideas of wabi are very closely connected. The description of a hut with the thatched roof on a seashore at dusk in autumn invokes the feeling of nostalgia and sadness, both so often reflected in Japanese poetry. This is the time in tea when mismatched sets and repaired dishes and bowls are supposed to be used. Not only one accepts things as they are, but also, we reuse (rather than recycle) multiuse objects because they are beautiful despite being repaired and because they possibly hold and share stories.

Expanding Aesthetic Impact

The traditional function of aesthetics in the West is to produce visual, aural, emotional impact and move the audience of spectators. While it is also true when we speak about Japanese aesthetics, there are additional areas where the latter expands the aesthetic experience. There are simply more categories in which beauty is manifested. Both wabi and kintsugi are good examples of that. In addition, aesthetics in Japan play an important role in politics, education, ethics, environment, maintaining of national identity, and many other areas.

Contemplative arts in Japan do not just exist in a well-protected environment far away from real life. They survive and flourish right in the middle of busy city life, in factories and companies. Employers use them as well-tested tools to provide an oasis of peace and quiet for their workers and to develop the workers' appreciation of arts in general. Chanoyu, Ikebana and other arts are taught in automobile companies and other industries, both because they provide a much-needed escape from the business of every day life but also because these "Ways" provide the perfect environment for the cultivation of the better workers and citizens. An everyday aesthetics where it seems that every object and act are based on both beauty and reason is most extraordinary. Where else would you see flower arrangements at a busy metro station?

The influence of Japanese aesthetics has reached far beyond Japan. Arguably, it is one of the most influential cannons of beauty in world culture today. It has had and continues to have significant influence on world architecture, painting, design, culinary arts, garden and flower arts, fashion and so on.

At the same time, aesthetics is also applicable to issues of environment, socialization, team building, leadership, and education just to name a few. I think it would be particularly interesting to apply Japanese aesthetics to the many walks of life outside Japan. Mara Miller writes: "The value of Japanese aesthetics lies less in the knowledge they give us about the Japanese… than the truths they expose about the human condition…" (Miller, 2011)

Conclusions

Japanese aesthetics opens a gate to a rich, complex, and fascinating world of a different kind of beauty. Exploring that world provides not only aesthetic pleasure but also offers a comprehensive and multifaceted perspective with multiple possible applications. Aesthetics-based contemplative practices can significantly improve one's productivity, mental health, and overall quality of life. While contemplative practices are directed inward, they also inspire curiosity and expand inter-cultural understanding. They help to develop a more compassionate view of the behaviour and values of others, especially of those who are unlike us. They facilitate acceptance of and compassion towards the other. In turn awareness of the other and of the world also cultivates insight and inward exploration.

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