SEPTEMBER 2017

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the quint

contents

EDITORIAL

It is September. again This issue of *the quint* welcomes the cooler weather and only a few Canada, snow, and blue quill geese flying South. Rain prevented crops from being planted in the Valley this year, and the birds are stopping in friendlier fields on their way South. The dearth of birds this September has not stopped new writers from joining *the quint*. Another eclectic offering of thought provoking articles, drama, and prose, this issue is designed for readers who enjoy diversity and are interested in new ideas.

Showcasing articles from the United States, Canada, and Nigeria, our thirty sixth *quint* begins with Sarita Cannon's fascinating (and educational) insights into the imposter tradition. In "Racing Towards Manhood: The Construction of Chief Buffalo Child Long Lance," Cannon considers the implications of Sylvester Long's construction of an Indian identity. Then, Meagan De Roover's interesting disscussion of sentimentality and horror in Canadian nationalism investigates how "the North" differentiates Canada from the United States. John Misak's "How Fighting Games Help Enable Student Players to Imagine and Investigate Narrative" follows. In his paper Misak argues that video games not only inform student literacy, they also enable students to create narratives that are aligned with canon. Next, the Marian Theory rides again in George Steven Swan's "The Proximate Impulse Behind Romeo and Juliet Quartos-Divergences." Weighing in on the debate concerning the misfortunes of Mary Wriothesley and the two Earls of Southampton she loved, Swan finds the backstory of Romeo and Juliet mired in matters of jointure and dowry. In "Woman's Selfhood Presentation from Carol Shields to Indigenous Women Writers," Ying Kong examines the various ways in which women's selves are shaped. Following, Benjamin Hufbauer's "*Star Trek* Into Drone Wars" presents a compelling consideration of history transmuted into science fiction throughout the *Star Trek* series. John E. Charlton and John George Hansen's "How Does Indigenous Knowledge Enhance Alcohol and Substance Abuse Programs" charts how beneficial Indigenous knowledge is to addictions recovery programs. *the quint* then is honored to present the works of three Nigerian born writers. First, Jackson A. Aleude's "Liberation Struggle in Africa: An Analysis of the Causes, Nature and Patterns of the Struggle for Independence in Africa North of the Saharan " traces the process by which countries in in North Africa achieved their independence after the Second World War.

No *quint* is complete without its creative complement. Stephen Oghehuro Okpadah's "The Victims" is a powerful one act play inspired by the activities of Boko Harem. Then. Joseph D. Atoyebi's "Johnny Just Come" is a finely crafted study of a young Nigerian emigre's first impressions of Germany. My visual offerings in this issue invite you to consider the rich beauty of the North, in summer and fall.

Here's to good reading and viewing, a warm Hudson's Bay blanket, and quiet nights at home with thought-provoking material while the geese fly bravely elsewhere. *the quint* will be back in December with more offerings for reading and viewing, just in time to trim the tree for Christmas.

Sue Matheson
Editor
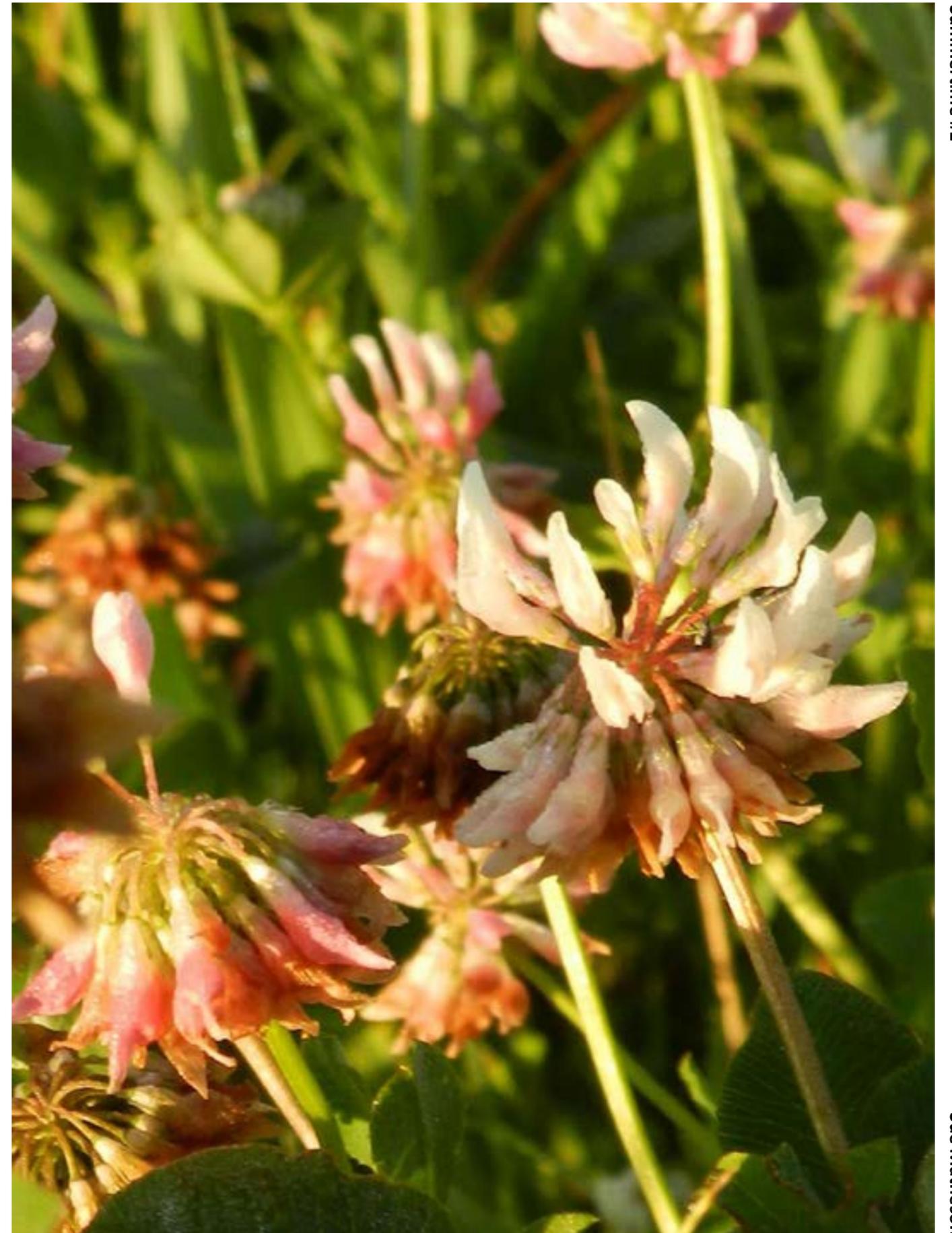
Racing Towards Manhood:

The Construction of Chief Buffalo Child Long Lance

by Sarita Cannon, San Francisco State University,

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"Kill the Indian, save the man." This was the motto of Richard Henry Pratt, founder of the Carlisle School, a boarding school for Indian children that served as the archetype for scores of similar institutions in the late nineteenth century. Pratt's chilling phrase refers to the brutal process, begun in 1879 and reaching into the mid-twentieth century, by which Indian children were forced to abandon their indigenous languages, beliefs, and traditions in order to become "civilized" in the eyes of the white man (Huhndorf 51). The language of Pratt's slogan demonstrates collective notions of race and manhood that circulated in postbellum America. At the heart of this ideology was the belief that Native peoples, if left to their own devices, were not human beings (or, in the patriarchal parlance of the time, "men"). Although they were primitive beings who were inferior to white Anglo-Saxons, they did have the potential to become men. They simply needed to slough off all remnants of Indian-ness to reveal the man beneath. While an Indian could never truly become white, he could become white enough to assimilate to European American culture. To paraphrase postcolonial critic Homi Bhabha, the process of colonization renders the subaltern almost white but not quite (Bhabha 280).[1]

This process of shedding one's Indian skin to reveal the civilized man within was especially complex for one Carlisle student in the early 1900s, a handsome young man named Sylvester Long. Born in Winston-Salem, North Carolina in 1890, Long claimed white and Native ancestry, but because of the binary racial paradigm that structured public identities in this time and place, Long and his family lived in the "Colored" section of town. From a young age, Long knew that he could not tolerate life as a black man in the Jim Crow South, and so he began a process of self-creation and recreation that would continue until his suicide in 1932. In search of opportunities that would allow him to escape life as a black man in the early twentieth century, Long matriculated at the Carlisle Boarding School by claiming that he was part-Cherokee and part-Croatan (D. Smith 41). Ironically, in order to "kill the Indian," Long first had to construct an Indian identity for himself. While many critics (including his biographer, Donald B. Smith) have characterized Long as an impostor – a black man who passed as an Indian man – the notion of passing does not quite apply to the man who would later be known as Chief Buffalo Child Long Lance, notably because now in 2013 he would be considered Lumbee. Although rumors swirled at Carlisle that Long had some African ancestry,

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1. Although Bhabha writes primarily about British colonialism in India (and I acknowledge the ongoing discussions about whether the term "Postcolonial" truly applies to American Indians), his treatment of colonial mimicry is relevant to the discussion of other colonized groups, including indigenous peoples in North America.

he was generally accepted by his peers and teachers. After writing a letter to President Woodrow Wilson in 1915 in which he claimed to be a full-blooded Cherokee, Sylvester was accepted as a presidential appointee to West Point, an institution that excluded black people at that time (D. Smith 51).

But just as Long was about to take his entrance exams, he fled North to Canada, the first of many flights to escape possible inquiries into his past. He earned a reputation as an excellent journalist in Calgary, Alberta, doing field research and writing articles about various Native American tribes. It was during this time that Long changed his official life story and claimed to be a full-blooded Blackfoot chief (D. Smith 109). Yet even as he documented the lives of Native peoples, some Indians were suspicious of Long Lance's version of his own life story. As a result, he consistently made attempts to legitimate his status as an Indian, including the 1928 publication of an autobiography entitled *Long Lance*, a tale of growing up as a Plains Indian (D. Smith 206-7). Even as he gained fame as a prominent figure in New York high society, as a well-known writer, and as an actor, many people, mostly Indians, openly contested his claim of being a full-blooded Indian (D. Smith 242-3). Over time these scandals took an emotional toll on him, and as a result Long Lance became depressed, started drinking, and eventually killed himself with a single gunshot to the head in 1932 (D. Smith 312-3).

Defining "authentic" Indian-ness is a centuries-old process performed by both Natives and non-Natives to distinguish between insiders and outsiders (Cook, " The Only Real Indians are Western Ones," 143), and eight decades after his death, Long Lance remains a victim of that game (Cook, "The Only Real Indians are Western Ones,"

142). The Lumbee Nation of North Carolina, in particular, has a long history of fighting for federal tribal recognition and authenticity in the eyes of Indians and non-Indians alike, a history I will outline shortly. The issue of authenticity is a particularly vexed one for the Lumbee, as demonstrated by an event in the mid-twentieth century. In order to stem the growing factionalism among the Indians of Robeson county in the 1930s and 1940s, the Farm Security Administration and the Office of Indian Affairs initiated the production of a community pageant that it hoped would "heal. . . . social wounds by fostering community pride" (Lowery 220). In 1940, Ella C. Deloria, a Yankton Dakota anthropologist, was recruited by the FSA and OIA and brought to Robeson County to develop the pageant (Lowery 221). Deloria lived with the Indians of Robeson County and "structured the pageant, titled 'The Life-Story of a People,' around the area's traditional agriculture and Indians' self-made social institutions – the schools and churches" (Lowery 223). Less important than presenting a factually accurate account of Lumbee/Cherokee/Siouan history was establishing a progress narrative of success and "educational and economic advancement" by people who did not rely on support from the U.S. government (Lowery 223). Phil Deloria (Ella's grand-nephew) also argues that "playing with the primitive" gave them some kind of agency because they were taking control of their representation (cited in Lowery 223). While the pageant (though embraced by many community members) did not halt strife among the Indians of Robeson County (and, in fact, in some ways "it illuminated a social and economic division within the Indian community that had been brewing for many years" [Lowery 227]), it did underline the potential for empowerment through self-creation that resonates so powerfully with Long Lance and his life.

While most critics have focused solely on Long Lance's putative racial transvestism, I am particularly interested in the role of gender in Long Lance's self-creation. For many years, Long Lance rejected any cultural or biological connection to blackness and embraced an identity as an Indian through a nuanced performance of gender.   I argue that his constructions of manliness not only informed but also bolstered his image as an "authentic" Indian. For Long Lance, masculinity and Indian-ness were two strategically constructed and intersecting identities that he manipulated in order to create a public identity that would allow him to escape life as a black man in a segregated society. Long Lance manipulated both the racialized discourse about gender and the gendered discourse about race in North America in the early twentieth century, operating as a trickster figure who both reinforced and unsettled cultural norms. In his public persona, his autobiographical writings, and his role in the 1929 film *The Silent Enemy*, Long Lance often sought cultural authenticity through a masculine yet non-threatening performance of Indian-ness that appealed to men and women alike. First I will discuss prevailing notions about the intersection of race and gender at the turn of the twentieth century, when Long Lance was coming of age and developing his public persona. I link this history to more recent poststructuralist theories of performativity as they apply to intersecting identity categories of gender, sexuality, race, and ethnicity, which serve as useful critical lenses for examining the intertwined performances of gender, sexuality, and culture that constituted Long's life. Then I discuss the complex history of the Lumbee Nation, the group to which Long and his family belonged, in order to contextualize his relationship to Indian-ness. Finally, I explore how Long Lance's public persona, his autobiographical writings, and his performance in *The Silent Enemy* all demonstrate his

masterful negotiation of prevailing notions about masculinity and Indian identity in the early twentieth century.

In her book *Manliness and Civilization: A Cultural History of Gender and Race in the United States, 1880-1917*, Gail Bederman outlines the ways in which manhood was remade in the late nineteenth and early twentieth centuries. She states the three questions that drive her project: What is manhood? What happened to middle-class manhood at the turn of the century? How is the discourse of civilization linked to male power and racial dominance? (Bederman 5). Particularly relevant to my discussion of Long Lance is her last question, as the cultural and political trends of this time period demonstrate the link between imperialism and white manhood that allowed for a refashioning of gender roles and ideals. Bederman identifies the 1910 Jack Johnson-Jim Jeffries fight as an important moment in popular culture that revealed the anxieties of Americans in the early part of the twentieth century. Johnson's win was seen as a blow to white supremacy. The race riots that followed his victory (and the animosity towards Johnson shown by mainstream press and average white Americans) destabilized the prevailing binarism of the fighting, primitive Negro versus the rational, brainy white man (Bederman 2-3). Jack Johnson, who not only beat the so-called "Hope of the White Race" in the ring but also openly consorted with various white women, served as a threat to white dominance (Bederman 2, 10). The link between manhood and whiteness was articulated on a larger scale by Theodore Roosevelt, who, around the same time as Jack Johnson's victory, established a public persona as a civilized white man that was intended to serve as an archetype for white American manhood (Bederman 171). Particularly in his writings, Roosevelt created

the national narrative of unmanly, savage Indians overcome by virile, civilized white Anglo-Saxons (Bederman 181). As Bederman writes, imperialism was "a prophylactic against effeminacy and racial decadence" (187). While turn-of-the-century discourse linked blackness with physical and sexual aggression, discourse during the antebellum era associated blackness with weakness, as Paul Gilmore writes in his article "The Indian in the Museum."

In relationship to the case of Okah Tubbee, a man of mixed (most likely white, Black, and Native) heritage who was born a slave around 1810 in Mississippi but created a public identity for himself as the son of a Choctaw chief, Gilmore outlines prevailing attitudes about Blackness and Indianness. Gilmore argues that Tubbee's construction of a Native identity relied upon "racial distinctions between Indians and blacks [that] already circulated in the museum and in the writings of people like Thoreau" (Gilmore 43). The racialist thinking of the time went something like this: while blacks were happy-go-lucky submissive creatures who "were content to dance and sing on Southern plantations," American Indians were "stoic" figures who refused to submit to the "advance of a white civilization" (Gilmore 26). Not only was there a supposed "natural" distinction between Africans and Indians, but each group was also explicitly gendered. Gilmore argues that the antebellum museum "mapped race along a gender axis – blacks represented effeminate submission, Indians manly resistance" (Gilmore 26). Like Okah Tubbee, Long Lance fled from blackness by asserting his manhood – and he articulated his distance from blackness by embracing rugged masculinity.

As historians and cultural critics have argued, the link between gender and race/ethnicity was more complicated than a "White equals manly" and Black/Native equals effeminate" formula might suggest. While some white men did see manliness as a quality that was inextricably tied to whiteness, others acknowledged that men of all races have a primitive sensibility that must be nurtured (Bederman 22). As a result, the turn of the century saw the growth of groups like the "Improved Order of Red Men" and other clubs that encouraged white middle-class men to express their inner primitive selves (Bederman 25). Shari Huhndorf has written extensively about the ways in which Indian-ness was fetishized by white men in the late nineteenth century. She asserts:

> Indian-inspired men's and boys' clubs began to spring up around the middle of the nineteenth century and proliferated in the decades that followed. One commentator, writing in 1897, even describes the last third of the century as the 'Golden Age of Fraternity.' During that period, up to one-fifth of all adult males belong to one or more of the seventy thousand fraternal lodges in the United States, many of which had Indian themes and sponsored Indian-type activities. (Huhndorf 65)

Citing the work of John Hugham and Gail Bederman, Huhndorf makes an important link between public displays of manliness and nation-building: "What physical strength accomplished for the individual, imperialism (as a form of physical and racial dominance) accomplished for the nation" (Huhndorf 68). Appropriation of Indian (or pseudo-Indian) cultural practices and military techniques by male organizations such as the Boy Scouts were attempts to instill a sense of masculinity in young American men. As Huhndorf points out, though, using Indian life as a model for young European American boys who would grow strong and contribute to the imperialistic activities of the United States seems quite contradictory (Huhdnorf 71). One of the ways this contradiction was resolved was that Boy Scouts were taught both to emulate and to conquer Indians:

"Indeed, Indian fighters such as Kit Carson, Buffalo Bill, and Daniel Boone numbered among the movement's official heroes, and it was the very act of fighting Indians that made them men. It was, in fact, this experience that scouting intended to replicate and to replace" (Huhndorf 72). In a broader cultural context, mimicking Indian cultures was viewed as an important stage in the development of civilization: "This regression into savagery, however, was not an end in itself but instead a means of playing out and finally overcoming boys' savage instincts as they grew into manhood, a process that parallels and confirms white society's rise to civilization" (Huhndorf 74). That is, playing Indian as a youngster could regenerate what many saw as a decaying and stagnant European American civilization around the turn of the twentieth century, but the goal was not to become Indian or embrace their cultures. "Playing Indian" was a vital but finite phase in the development of a virile, strong, white civilization.

While Huhndorf, Bederman, and Gilmore refer to the literal performances of Indians and Africans in public venues such as museums, minstrel revues, and Wild West shows, their studies also call attention to the performative quality of raced and gendered identities. Poststructuralist theories of the performative nature of identity have sometimes been misunderstood in fairly narrow terms. Performing gender is conflated with being in drag, and performing race is conflated with racial passing. While gender and racial passing are important modes of performance, they are not the *only* modes of performance. Judith Butler puts it thus: "The act that one does, the act one performs, is, in a sense, an act that has been going on before one arrived on the scene. Hence, gender is an act which has been rehearsed, much as a script survives the particular actor who make use of it, but which requires individual actors in order to be actualized and reproduced as reality once again" (Butler 160). All identities are constituted by a series of actions, actions that are always already informed by cultural norms, values, and practices. Although we have the power to exchange old identities for new ones, there is a limited number of identities to choose from, and those identities cannot be constructed from scratch. While Sylvester Long Lance's identity may seem analogous to a series of outfits that he donned at different times for different purposes, his identity as an Indian man was, in fact, much more complex.

The reasons for Long Lance's unusually complex relationship to Indian identity are numerous; but one of the most important factors is the history of the Lumbee tribe of North Carolina, about which Karen Blu, Gerald Sider, and Malinda Maynor Lowery have written extensively. Despite this large body of work, the origins of the Lumbee people remain in question, and Anne McCulloch and David Wilkins assert that "these conflicting origin theories have contributed in no small part to some of the identity questions Lumbees have confronted internally" (376). I would further argue that these different origin stories have also made the Lumbee q3p0uest for federal recognition more challenging because the perceived lack of unity among the tribal members does not mesh with constructed images of "real" Indians" (McCulloch and Wilkins 369).[2] Citing the work of Adolph Dial, David K. Eliades, and Jack Campisi, McCulloch and Wilkins offer three possible theories of origin for the people now know as the Lumbee. Some assert that the Lumbee are descended from "several small Southeastern tribes: the Hatteras,

2   McCulloch and Wilkins identify four factors that determine a tribe's chances of federal recognition: (1) "How well the tribe and its members meet social constructions of the image of an Indian"; (2) "How cohesive. . . the self-identity of the tribes' members" is; (3) To what degree the general public finds "moral value" in the tribe's claims of legitimacy; and (4) The extent of the tribe's resources in terms of "population, wealth, land, etc." (369-370).

Saponi, and Cheraw, who from the 1780s through the 1840s worked their way into Robeson country where they intermarried and gradually developed a distinctive tribal identity" (376). The most widely known theory is that Lumbee descended from the "Hatteras Indians living on the Outer Banks of North Carolina [who] intermarried with John White's 'Lost Colony' of Roanoake Island sometime in the late 1500s" (376). This theory of origin was developed and publicized by North Carolina state legislator Hamilton McMillan in 1885 after interviewing Indians in Robeson County, and it explains why the term "Croatan" was used to apply to Lumbee people in the late nineteenth century. Malinda Maynor Lowery explains that the term "Croatan" referred to "the name of the place to which the English colonists are said to have gone after they abandoned Roanoake Island" (26). Yet another account of the genesis of the Lumbee people "asserts that the Lumbees are primarily descended from the Cheraw tribe of South Carolina and related Siouan speakers who were said to have inhabited the area known as Robeson County since the later eighteenth century" (McCulloch and Wilkins 376). This account of the origin of the people now known as Lumbee reflects the history presented on the official website of the Lumbee Tribe of North Carolina ("Lumbee Tribe History and Culture").

These multiple origin stories also help to explain, in part, the numerous names by which the Lumbee have been called by state and federal governments. In 1885, North Carolina acknowledged the Lumbee "as Croatan Indians of Robeson County" (McCulloch and Wilkins 378). But "Croatan," which was shortened to "Cro," soon became a pejorative term used by whites in Robeson County (Blu 78). Karen Blu explains the term's connotations:

> "Cro(w)" is, of course, a White term for Blacks (as in "Jim Crow"). When I asked one of my Indian friends what kind of bird a crow is, he replied "a nasty black thieving bird." Another explained that Whites used the term "Croatan to mean "half-breed, mixed-blood someone with Negro blood." (Blu 78)

Because of the name's negative associations, in 1911, the "Croatans" successfully lobbied to change their name to "Indians of Robeson County" (Blu 79). However, this shift did not help their bid for recognition, as "the federal government does not recognize 'Indians,' it recognizes particular Indians with historically documented 'tribal' names and affiliations" (Blu 79). Two years later in 1913, the legislature once again changed the name to "Cherokee Indians of Robeson County," though the Eastern Cherokee "protested this phrase because they felt it would lead to pressure to share what few entitlements and benefits they received from the federal government" (Sider 3). Yet the Lumbee continued to be referred to as Cherokee (a historical fact that legitimates Long Lance's claim that he was part-Cherokee, a claim that earned him a spot at the Carlisle School) until the 1930s, when the federal government considered designating them as Siouan or Cheraw Indians but was defeated by the BIA who opposed this change (McCulloch and Wilkins 379). Over the next two decades, tension brewed regarding the proper name for the Indians of Robeson County. In 1953, community leaders successfully lobbied the North Carolina government to acknowledge them as "Lumbee Indians of North Carolina," a named "derived from the Lumber River that flows through the county" (McCulloch and Wilkins 379). The Lumbee Act of 1956 acknowledged the Lumbee as Lumbee in the eyes of the federal government, but made them the ineligible for federal services (McCulloch and Wilkins 379). Incredibly, "the tribe was recognized and terminated in

the same legislation" (McCulloch and Wilkins 379). Since then, Lumbee have worked hard to change the legislation to obtain the rights and protections of all other federally recognized tribes, and they recently came one step loser to achieving their goal when the Senate Indian Affairs Committee passed the Lumbee Recognition Act in July 2011. Richard Burr, a Republican senator from North Carolina stated: "I am hopeful that this bill will be brought to the floor for a vote so that the Senate can fulfill its commitment to achieve fairness and justice for the tribe" (Cornatzer). President Obama also supports this bid for true recognition of the Lumbee, and after a half-century, it appears that their access to federal recognition (and the rights and responsibilities that status inheres) may be at hand.

Another element that needs to be considered when sorting out Long Lance's cultural identity is the practice of adoption into Native communities. Long traveled extensively in Canada and wrote about the plight of Blood Indians there in the early twentieth century and formally became a part of an indigenous community in Canada. As sociologist Eva Garroutte writes in her 2003 text *Real Indians: Identity and Survival in Native America*: "In recognition of such efforts [to advocate for Indians and to write newspaper articles about their lives], the Blood Indians, a member tribe within the Blackfoot Confederacy, adopted him and invested him with a ceremonial name, one that had been carried before him by an honored warrior. It was the name he always used thereafter: Buffalo Child" (Garroutte 3-4). Indeed, Long's connection to the Blackfoot community was long-lasting and ceremonially sealed; moreover, there are many examples of people who identify with a particular indigenous community but cannot trace their bloodline to that tribe. Garroutte discusses how Indian-ness past and present has been defined legally, biologically, culturally, and individually (Garroutte 135). While many scholars have written about the complexities of Indian identity, Garroutte provides new insight into words that have become so charged in the discussion of how to assess of Indian identity, including "blood," "essential," and "authentic." Garroutte offers her own working definition of Indian identity that is expansive but not limitless: "Individuals belong to those [Native] communities because they carry the essential nature that binds them to The People and because they are willing to behave in ways that the communities define as responsible" (Garroutte 134). Importantly, though Garroutte uses the phrase "essential nature" in her definition, she suggests that in "many Native philosophies. . . it appears that essential nature is usually but not necessarily" passed on through birth but that "can also be created ceremonially," as in the case of adoption within certain tribes (Garroutte 125). It is telling that Garroutte begins and ends her book with the case of Long Lance, asserting that he is a prime example of these challenges of identity and performance faced by Native peoples today. The vehement reactions to Chief Buffalo Child Long Lance both during his lifetime and several decades later illustrate the destructive and painful process of "attack[ing] and demean[ing] the identity claims of others" that occurs in some Indian communities (Garroutte 143).

Long was known for his work as a writer and as an actor, but he was also a celebrity, a public personality who was, to a certain extent, "famous for being famous." In particular, his physicality constituted a large part of his charm. Long was an athlete in several sports, a judge for sporting events, and a stuntman who engaged in various physical

feats, including balancing on his head on the wall of a Winnipeg skyscraper (D. Smith, 152). And one anonymous guest at a dinner party given by Irving Cobb in the 1920s describes Long Lance in these terms: "A full-blood redskin and a genuine aristocrat this same gentleman, chief of the noble Blackfoot tribe. A magnificent athletic boy, strong jaw, white teeth, golden-brown skin, black glittering hair, black glittering eyes" ("Indian Chief in Park Avenue"). In the eyes of this anonymous dinner guest, Long became an object praised for his aesthetic value and rugged frame. (It is interesting, however, that while he is described as strong, manly figure, he is also infantilized and emasculated through the word "boy," a derogatory term used at the time to refer to black men who were chronologically well past boyhood. At the time of this dinner party, Long Lance would have been in his early twenties).

As the quintessential trickster figure, Long Lance constantly straddled the lines between femininity masculinity, between civilization and primitivism. A cartoon from the *New York Evening World* illustrates Long's negotiation. In this strip, we see Cicero Sapp dressed in full cowboy regalia at the Banff Springs Hotel. Sapp is telling a woman, presumably another employee, that he wants to be dressed appropriately to meet a "Real Indian chief" whose arrival at hotel is imminent. The woman warns Sapp that his attire is ridiculous for the occasion, but Sapp insists on the appropriateness of his outfit, saying, "I want the chief to know I'm a man of the wide open spaces." In the final frame, a formally dressed bespectacled man introduces Sapp to Chief Long Lance, who is wearing an elegant tuxedo. His hair is slicked back, and his facial features are striking, almost effeminate. He is smiling and exudes gentility. In the same frame we see Sapp holding his

side with one hand and scratching his head with the other hand, his mouth agape, his hat hovering above his head. The cartoonist has drawn droplets of sweat and a question mark above Sapp's head to underscore his utter disbelief. This short cartoon says a great deal about how Chief Long Lance was perceived by the general public in the 1920s. Sapp's vision of a "real Indian" must have looked something like the images of Native Americans that Hollywood was just beginning to produce: "noble savages" dressed in loincloths and feathers, armed with arrowheads, and equipped with a deep connection to the natural world. Yet upon meeting Long Lance, Sapp's prejudices are clearly exposed as mistaken assumptions. Long Lance's simultaneous ability to serve as an "authentic" symbol of the disappearing Native American and to inhabit the white mainstream world was a huge part of his appeal. Long Lance appealed to the average American's desire to know the "real" Indian experience, yet he was palatable enough to be a member of high (white) society. As this cartoon suggests, Long Lance was able to use his "exotic" Native background and looks to his advantage, but he also knew how and when to present himself as the exquisitely packaged Native who has assimilated completely to Anglo-American cultural values.

Not surprisingly, women swooned over Long Lance, and the narration of the 1986 documentary *Long Lance* emphasizes his numerous sexual liaisons with white upper-class women. He possessed not only a charismatic charge, but also a sexual magnetism. Long Lance's virility and manly sexuality correspond to stereotypes of black men as well-endowed "bucks" who preyed on white women. Yet in Long Lance's case, his sexuality was not threatening but rather exciting and exotic because he represented the ultimate

forbidden fruit for the average white female socialite. The thrill of miscegenation, a social and legal taboo at the time, may have drawn white women to Long Lance's bed. Bessie Clapp remembers that it was "love at first sight" when she first met Long Lance, and that her adoration has never ceased. Clapp's "love" for Long Lance seems contingent upon his identity as an Indian. He was exotic, but still "tame" enough to be part of New York society. Clapp says that she had "always loved the Indian people" (*Long Lance*). She says this in the same manner she might if she were saying that she had always loved Cocker Spaniels. Indians were curious to her, and Long Lance embodied the "real" Indian, complete with "royal" heritage. Many Native American writers have articulated this uniquely European-American desire to become Indian. Louis Owens argues that myriad white American fictional heroes from Huck Finn to John Wayne's role as Ethan Edwards in *The Searchers* embody "America's five-hundred-year-old desire to become Indian, that unconscious but oft-articulated yearning to empty the space called Indian and reoccupy it. Only thus, America instinctively feels, can it ever achieve a direct and intimate relationship with the place it has stolen" (Owens 106). Clapp's desire to possess Long Lance may be read as a desire to claim Indian identity. Indeed, Long Lance's body titillated and inspired white people without threatening them in the way that a legibly black male body might have.

Long Lance's journalistic and autobiographical writings reinforced his public performance of an all-American kind of masculinity. His consistently asserted his belief in the value of rugged individualism and the idea of America as a land of meritocracy. In an article written for *Cosmopolitan* in June 1926 entitled "My Trail Upward," Long Lance perfectly articulates the American myth of equal opportunity for all: "I'm proud of my Indian heritage—and I'm proud, too, of the land and people of my adoption. I have reached no dizzy heights of material success, but I have succeeded in pulling myself up by my bootstraps from a primitive and backward life into this great new world of white civilization. Anyone with determination and will can do as much" (Lance, "My Trail Upward," 138). Here Long evokes the twin discourses of American individualism and exceptionalism, a tradition that begins with the self-made man of Benjamin Franklin's autobiography, resonates in Horatio Alger's Ragged Dick stories, and exists today in the rhetoric of those who believe that the United States is a meritocracy in which anyone can succeed in America as long as he pulls himself up by his proverbial bootstraps (despite the fact that, metaphorically speaking, many people lack arms or boots or both).

This link between rugged, self-sufficient masculinity and "authentic" Indian-ness also emerges in Long Lance's 1928 autobiography *Chief Buffalo Child Long Lance.* The publication received favorable reviews, including one from *The New York Times Book Review* noting that the book was "interesting in its subject matter and told with notable mastery of vivid and forceful English" ("Recollections of an Indian Childhood" 42). This narrative, which reflects not Long Lance's life but the life of 3p0a close friend of his on the Blackfoot Reserve, Michael Eagle Speaker, was originally written as a work of fiction. As Jonathan Brennan writes in the introduction to *When Brer Rabbit Meets Coyote: African-Native American Literature,* Long Lance "did not intend to publish [the narrative] as his own autobiography. . . . he apparently accepted *Cosmpolitan*'s insistence on publishing the fictional work as his own autobiography" (Brennan 29). Long Lance

states in the introduction to the first edition that he is writing not to glorify himself, but to uplift the Indian race: "They [his friends in the Northwest] and my publishers persuaded me that it is an interesting narrative. And, so, here it is" (Lance, *Long Lance,* xxxxviii). His motives are figured as purely altruistic. While I have no reason to question Long Lance's commitment to indigenous peoples, this text no doubt gave him another opportunity to prove himself as Blackfoot Indian to the American public.

Long Lance is full of scenes of violence that would appeal to an adventure-loving reading public, and the author taps into a collective desire on the part of European American readers to read about young "braves" proving their manhood in gory battle" (Cook, "The Only Real Indians are Western Ones," 147-8). Chief Buffalo Child Long Lance equates manliness with real Indian-ness throughout the text. For example, he recalls that his older brother told him as a child: "You are four years old, and if you cannot ride a horse now, we will put girls' clothing on you and let you grow up as a woman" (3). He also makes sweeping claims about Blackfoot cultural attitudes towards gender divisions: "Indians are extremely fond of children, and to have no offspring is regarded as a calamity, a curse. Boy children were always preferred; they would grow up to be hunters and warriors, while girl children could be of little economic use to the family or the tribe" (181). And his disparaging description of the boarding schools is gendered as well: "To have to work like women, when we had thought that we were going to be warriors and hunters like our forefathers" (277). Long Lance implies that such a fate was shameful and unmanly. Nancy Cook's assertion that Long Lance not a "complete imposter but . . . an Indian man who plays Indian in order to gain cultural capital and to retrain whites in

their thinking about Indians" is useful to consider when analyzing his discussion of gender in his memoir (Cook, "The Only Real Indians are Western Ones," 147). Whether or not Long Lance's description of gender norms resonates with "actual" practices in Blackfoot community, Long was aware of the potency, masculinity, and aggressiveness historically attributed to the Blackfoot people, and he used that perception to his advantage. As Cook writes, "In an era when anyone who was not white could ill afford a temper, or any physical expression of anger, especially in Long Lance's hometown of Winston-Salem, Long Lance's Blackfoot (and indeed the Assiniboines and Crees he writes about) remain fighters long after other people of color have been subdued. Long Lance presents this fact as point of pride" (Cook, "The Only Real Indians are Western Ones," 150).

In addition to performing a version of Indian manhood in his life as a socialite and in his writings, Long performed as a Native hero in the role of Baluk in Douglass Burden's film *The Silent Enemy.* The 1929 film featured scenes of a virile Long Lance dressed only in a loincloth, his copper-colored skin gleaming and his muscles rippling. As Donald Smith writes in his biography of Long Lance, Burden chose Long Lance portray Baluk, "the epitome of manly development," according to the script, because of his "arresting portrait in the frontspiece of his book *Long Lance*" (D. Smith 232). Indeed, Long Lance was cast because of his looks, and his looks sold the movie. With the release of *The Silent Enemy*, Long Lance became a national celebrity. Yet being in the public eye also made him the object of intense scrutiny. In particular, his background was questioned, and William Chanler, the film's coproducer, sent Ilia Tolstoy (an acquaintance of Long Lance) to investigate the validity of Long Lance's life story. This was particularly important

for Chanler and Burden because the movie was billed as a documentary starring "real" Indians. Any confirmation that the star the film was not Indian (or, worse yet, was black) would have undermined the integrity of the project in the eyes of its producers. Tolstoy did garner statements from whites in North Carolina who testified that Long Lance "although not a full-blooded chief on the Blood tribe of Western Canada, was nevertheless considered part Indian not a negro" (Cook, "The Scandal of Authenticity," 120). This discovery satisfied Chanler and Burden, and Long Lance continued filming. The movie was released, but the "rumors about his dubious racial heritage" lingered, and "he was shunned by many acquaintances and friends in New York's 'smart set' who had once been drawn to the authenticity with which he embodied the exotic" (Cook, "The Scandal of Authenticity," 120). Although the producers did not promote Long Lance as the star of the film after learning that he was not the full-blooded Indian chief he claimed to be, the movie studio of Paramount Pictures did use Long Lance's image to sell the film. As Cook argues: "Long Lance figures prominently in the display advertising for *The Silent Enemy*. In fact, with proclamations of 'Real Dangers! Real Indians! Real Romance!' and 'Wild Country! Wild Animals! Wild People!' or 'Wild Love! Wild Life!,' the ads titillate us with the promise of the primitive and Long Lance is the emblem for it" (Cook, "The Scandal of Authenticity," 121).

One particularly powerful scene occurs later in film, after the Ojibway have been suffering from hunger (the eponymous "silent enemy") for several months. The tribal members have decided that one of the leaders of the tribe, Baluk, (played by Long Lance) must be killed because he led the band on a dangerous journey (during which Chief Chetoga died) to a spot where he predicted the caribou would be, but the caribou never materialized. Despite this grim fate, Baluk is determined to die on his own terms. Dressed only in a loincloth, Baluk beats a drum and chants on his funeral pyre in the night. There are shots of people shivering in the cold (the film was shot a forty degrees below zero) and weeping for Baluk, and a dog howls (D. Smith 241). The scene of Baluk chanting while surrounded by flames is haunting in its pathos and intensity. Luckily for Baluk, however, just as the fire begins to engulf him, the other tribal members see the caribou (D. Smith 242). Baluk's life is spared, and the tribe will not die of starvation. Long Lance's portrayal of an Indian man who is determined to die with dignity resonates with stereotypes of stoic Indian men who suffer physical trials but maintain their honor. In a sense, Long Lance plays the quintessential Noble Savage, a portrayal that, from a 21st-century perspective, ostensibly undermines his own efforts to render visible and human the experiences of indigenous peoples in North America. Yet for Long Lance, this film role provided the opportunity to authenticate his Indian-ness on the big screen for a broad and largely non-Indian audience whose knowledge of American Indians was limited to stereotypes of solemn figures in headdresses or scalp-wielding "savages" in loincloths. As Eva Garoutte reminds us, "while individuals certainly formulate ideas about their race, it is the larger society that ultimately invests their assertions with legitimacy – or refuses to do so" (141). I would further argue that ethnic, cultural, and gendered identities also require the viewing, investment, and consent of an audience, which made the stakes of Long Lance's portrayal of a strong Indian (and presumably heterosexual – he and Neewa, the chief's beautiful daughter, played by Penobscot actress Molly Spotted Elk, end up together) man on film so high (D. Smith 233, 244).

Long Lance's sustained ability to inscribe himself as an Indian man who was handsome and culturally "authentic" without being sexually, physically, or politically threatening positions him as a trickster, a figure that, as David Elton Gay and Sandra Baringer have articulate, is central to both African and American Indian traditions. While trickster has many manifestations in these two traditions (and in the African-Native American tradition that Jonathan Brennan theorizes[3]), he is often defined as a "ubiquitous shape-shifter who fell on borders, at crossroads, and between worlds" (J. Smith 1). Indeed, one of the most common traits of the trickster in multiple cultural contexts is his liminality, a characteristic that is also shared by the mixed-race figure. Drawing upon the work of William G. Doty, William Hynes, and Victor Turner, Jeanne Rosier Smith catalogues the identifying marks of a trickster figure. In addition to being situated at "crossroads and thresholds," tricksters are "uninhibited by social constraints," can "escape virtually any situation," and have a "boundless ability to survive" (J. Smith 8-9). While the trickster figure exhibits behavior that places him on the margins of society, he is simultaneously central to the survival of culture and actually reinforces the importance of cultural values: "The trickster's role as survivor and transformer, creating order from chaos, accounts for the figure's universal appeal and its centrality to the mythology and folklore of so many cultures" (J. Smith 3). Indeed, Long Lance was a literal shape-shifter who continually remade himself in order to survive. He simultaneously capitulated to prevailing notions about race and gender in the early 20th century and subverted the idea of race as a stable and knowable entity by crossing boundaries and creating himself anew.

If we understand Long Lance's life as a series of performances in accordance with a particular set of intertwined gendered and racialized scripts, then perhaps his most enduring performance consists of the scrapbooks and mementoes he left behind. Housed at the Glenbow Museum Archives in Calgary, Alberta, these documents provide important evidence of how Long Lance understood himself. It is unclear for whom these scrapbooks were intended, but the fact that Long Lance went back and changed his tribal affiliation in the scrapbook each time he changed it publicly suggests a deep investment in maintaining a coherent life narrative. Yet it is precisely in those gaps (for example, where "Cherokee" has been crossed out in early newspaper clippings that refer to his identity) that Long Lance reveals the incoherence and messiness of all of our lives. The scripts according to which we define our identities are constantly in flux and sometimes contradictory, as they were for Long Lance. He was constantly negotiating among the various ideas of racialized manhood that circulated in his era: the rugged and stoic Indian man, the self-sufficient yet civilized White man, and the sexually and physically aggressive black man. He used his body and his intellect to carve out an existence that allowed him to survive in a society that feared black men and fetishized Indian men. His mimicry demonstrated not simply a capitulation to colonial, chauvinist, and racist ideals but also a harnessing of the potential power of the trickster figure. Despite the tragic circumstances of his death, Long Lance was not simply another tragic mixed-race member of the Wannabe Tribe. An examination of his life fruitfully complicates our understanding of the knotty intersections between performance and performativity, race and gender, and the real and the authentic.

3. See Jonathan Brennan's Introduction to *When Brer Rabbit Meets Coyote*.

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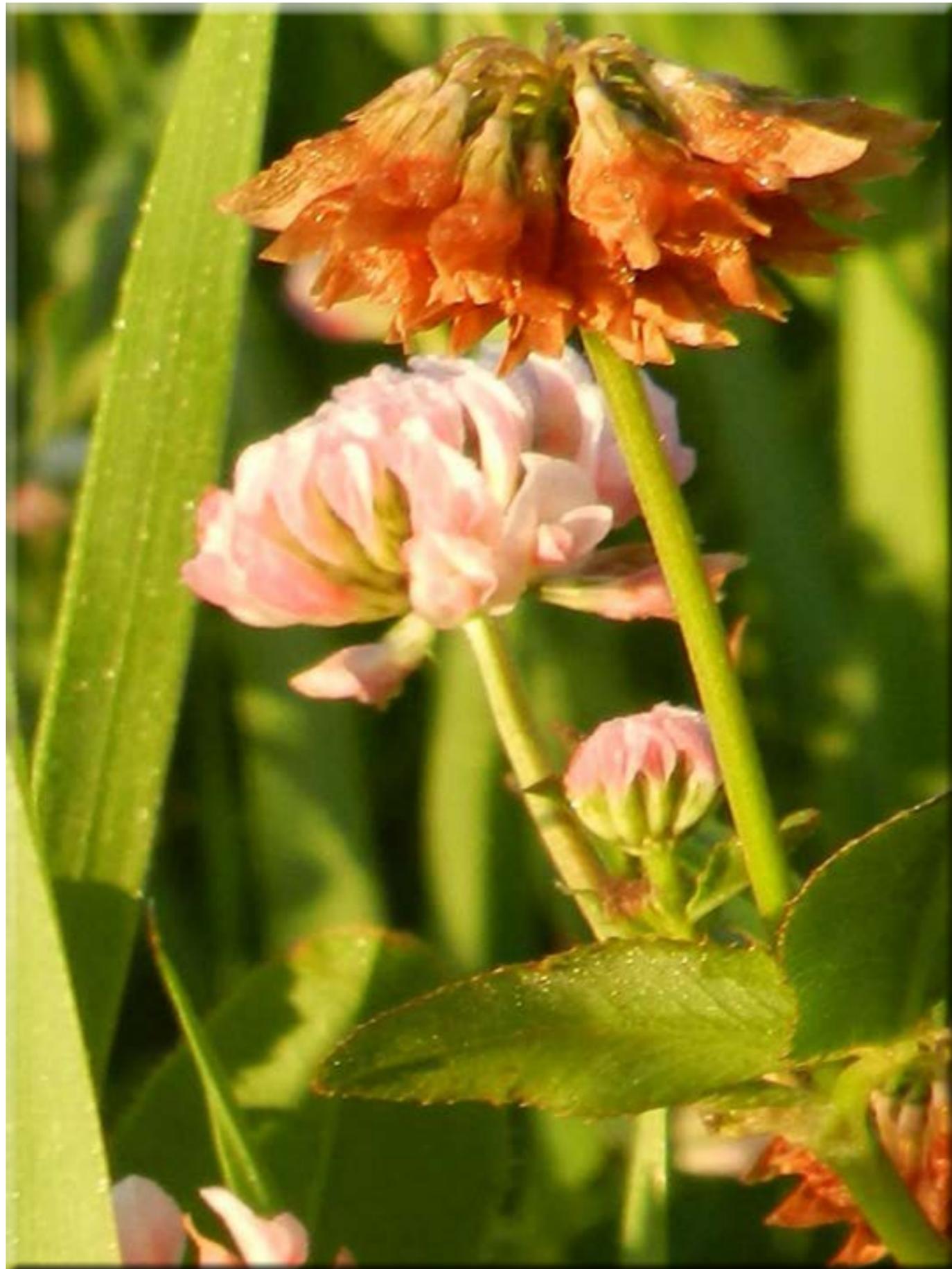
Sue Matheson

Constructing the "True North":

Sentimentality and Horror in Canadian Nationalism

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Oh Canada! Where pines and maples grow.
Great prairies spread and lordly rivers flow.
How dear to us the broad domain,
From East to Western sea.
Thou land of hope for all who toil!
Thou True North, strong and free![1]

"The True North Strong and Free" is a line from the Canadian national anthem that has long struck a chord with me. As a Belgian Canadian that grew up everywhere but the countries where I held nationalities, I was entranced by the idea of "the North" as a location that somehow held clues to my identity. Somewhere in the tundra that David Attenborough narrated was a home I had never experienced, in Jack London's descriptions was adventure that seemed like a birth right, and in Farley Mowat's critiques, a sorrowful yet sentimental sense of belonging. Now that I reflect on my associations of "the North,"

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1. The second stanza of the Canadian National Anthem

I am compelled to wonder what that place really is. As an ideological construction, "the North" functions as a method for conveying Canadian nationalism, but what are the representations at play? What is "the North" if not the "True North"?

Of course, the idea of "the North" is a social construction relative to one's position and understandings. All directions are. Consider our definition of what the "West" is—out of the large population that sees themselves as Westerners few are consciously referring to the bisection of the Roman Empire that prompted this discursive tradition. "The North," then, is always oppositional to "the South." An oppositional rhetoric reflective of the Canadian/American relationship, that in Canadian nationalism is almost always oppositional. In fact, I recognize that I have only ever been considered a "northerner" when I was not in "the North." Due to the cultural similarities constructed by the proliferation of American media in Canada, attempts at Canadian nationalism are often constructed as simply "not American," or, through recognisable stereotypes that achieve this difference without saying it outwardly. The majority of Canada's population hugs the 49th parallel making the differences between our physical proximity to the US and our rhetorical conventions obviously ideological.

Understanding how "the North" differentiates Canadians nationally from Americans, we must now ask how this functions within a larger international arena. Why is "the North" such a specific construction when in reality, the terrain is not all tundra and our seasons are more than just winter? The seasonal realities do lend themselves to regional aesthetics, but how do tundra and icebergs reflect the lushness of Quebec, or the golden prairies of Saskatchewan? What are the purposes and the effects of such a construction, or of an obsession with polar bears—even though the majority of Canadians will only ever encounter one at the zoo, or, worse, through a Coca-Cola ad campaign? And why am I referring to the natural world to define my nationality, rather than cultural practices or traditions?

The sentimentalization of the environment reflects the Canadian nationalist construct. We can already see it in the way I have been discussing Canada as a geographic mass, rather than a political, historical, and culturally adhesive place. While this might problematically erase peoples and cultures from the concept of "Canada," the sentimental construction of "the North" is not a completely negative thing. Sentiment, a somewhat difficult to define idea, has been interpreted broadly to be a negative and overly emotional way of viewing the world. Despite this charge, Robert C. Solomon's *In Defence of Sentimentality* argues that sentimentality "is not an escape from reality or responsibility but, quite to the contrary, provides the precondition for ethical engagement rather than being an obstacle to it"[2]. In using a sentimental "North" as a linchpin for Canadian identity, there is a host of semiotic linkages that facilitate a positive and useful national construct. If Solomon is correct, Canada's sentimental iconography of the natural world as definitive to its identity would preclude an ethical responsibility to its protection of natural resources. Therefore, "the North" as I examine it in correlation to Canadian identity is not only a geographic location and a social imaginary, it is also indicates a set of values and responsibilities that then intertwine with identity (whether this translates into actual environmental protection is left ambiguous). Arctic sovereignty and environmental protection become unified in the discourse through a sentimental lens that, while kitsch in its representations of Mounties and shining glaciers, offer a

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2. Robert C. Solomon, *In Defense of Sentimentality* (Oxford: Oxford University Press, 2004), 4.

more interesting interpretation.

But why this format and not another? If this "North" is relational, nationalistic, and socially constructed, it is inherently nebulous. Is it the magnetic pole? An ecosystem? Where Santa spends 364 days out of the year? A construct? Clearly, the images associated with "the North" rise out of the circumpolar region and then stand in as a synecdoche for the rest of the country.

The designation of the Arctic as a geographical region is already problematic based on where one identifies the southern limit. As Elizabeth Kolbert writes, "to use the Arctic Circle as the boundary means including parts of Scandinavia so warmed by the Gulf Stream that they support frog life, while at the same time excluding regions around James Bay, in Canada, that are frequented by polar bears"[3]. In this example, the Arctic is constructed as cold, so that the presence of Scandinavian frogs actually compromises its arctic status. Additionally, the recognition that the circumpolar region includes multiple countries breaks down the idea of the authentic "North" as a solely Canadian symbol. While the truth of the circumpolar region as international is undeniable to anyone with even basic geographical knowledge, this is rarely the way "the North" is represented in continental American media. Often,

> we see that political gestures and declarations seem frequently to have surpassed diplomatic speech and action, leaving Canadian citizens with the idea that the Arctic is entirely theirs, that is contains unimaginable riches, and that its territory is under threat of being deprived of its golden and black treasures by greedy foreign countries.[4]

As Geneviève King Ruel goes on in her article "The (Arctic) Show Must Go On", this representation has the effect of "stressing the sense of northerness as a central aspect of Canadian identity" regardless of its veracity[5]. Even though Canadian nationalism and identity is tied to "the North," it is equally evident that "the North" functions as an apolitical region in media in order to provide a surface for global projection, working opposite to King Ruel's first claim—unless of course, we assume, like I did growing up, that this apolitical region could never be anything but Canada and so explicitly stating it would be redundant. But for the sake of argument, let's put aside nationalism for a moment and consider the other ways in which "the North" is constructed internationally and more sentimentally.

Coca-Cola has featured an international marketing campaign highlighting polar bears since the 1920's[6]. In the past decade, polar fantasies where polar bears and (at times) penguins tumble about the impressionist glacial landscape and sip coke from glass bottles has evolved alongside Coca-Cola's popular 'Santa' campaign. "The North" is exotic and fantastic as it fuses polar fauna into a single space—a bridging that uses the appeal of the charismatic animals and a global audience rather than any kind of environmental reality. The family of polar bears often featured in T.V. commercials and ad campaigns play out a narrative of childhood without using specific ethnicities or cultural codes that Coca-Cola might later regret (as they have with some of their recent campaigns). It's more broadly readable than the Santa campaign which appears on pop cans every winter.

3. Elizabeth Kolbert, "Introduction," *The Ends of the Earth: An Anthology of the Finest Writing on the Arctic and the Antarctic* (New York: Bloomsbury USA, 2007.), 2.
4. Geneviève King Ruel, "The (Arctic) Show Must Go On", *International Journal: Canada's Journal of Global Policy Analysis* 66 (December 2011): 829-30.

5. Ibid., 826.
6. Ted Ryan, "The Enduring History of Coca-Cola's Polar Bears," *Coca-Cola Company* (Coca-Cola Company 2012), accessed 11 December 2012.

Swapping a Polar bear in for Santa is also wildly effective since the same imaginary of "the North" sets the scene but now the polar bear reaches a wider audience culturally and seasonally. By culturally, I mean those who might not ascribe to the commercialization of Santa but can still be lured in by the nostalgia of a nuclear family construct. Still, why a polar bear? Why not another animal—another construct? Even without the media connection between the polar bear and Santa schemes, there are interpretative benefits of using this mega fauna and this space as a fantasy.

The first benefit is that the polar bear is not immediately recognizable as a culturally specific animal, at yet still transmits charismatically the allure of big game and whiteness. Consider the interpretive overtones of, say, a black bear—whom, incidentally, more Canadians would have had contact with in their daily lives. The imagery of different bears hold other nationalistic overtones, including the Russian Black Bear from the Cold War era, or the Americanized Grizzly, Smokey the Bear, or the cuddly pan-oriental Panda already in use by the World Wildlife Foundation. A Coca-Cola campaign with any of these bears would not reach a global audience in the same way. There is something wonderful about the pristine white snow and the likewise coloured polar bear that keeps us captivated as an audience. Unfortunately, there is also an element of nostalgia at play, created by the original Coca-Cola bottles, family values, and Christmas-y narratives in the commercials while hinging on the impending ecological disaster that is already destroying polar bear territory. Sentiment and nostalgia feed the semiotic interpretation of the polar bear, successfully intertwining our wonder and pity into commerce and consumption. For a Canadian audience, this pity could be more specifically located within the environmental responsibility I aligned with Solomon's definition of sentimentality,

but since there are no overt Canadian nationalist overtones, anyone can participate in the sentiment. The choice of the polar bear evokes wonder, excitement, and the self-satisfaction that comes from speaking to an environmentally friendly, sentimental, but possibly ignorant consumer. After all, even though Coca-Cola's joint campaign with WWF to save polar bears (and therefore "the North") is laudable (and to a degree, lucrative,) the production practices of mass consumerism contributes significantly to the same endangerment.

As mentioned above, there are two reasons why this mega fauna and space are particularly interesting for advertising and commodification. The polar bear is a poignant example of the first: pulling on heart strings as the cubs symbolize hope while also being the fierce survivors of the swiftly vanishing ecosystem they call home. But why the polar bear? What about a lion instead? Or a giraffe? Or an elephant? There is something to be said for the ways in which space allows the animals and our imaginations to construct a cohesive fantasy. The exotic, the dangerous, and the nostalgic elements can easily signify both polar and African mega fauna. The shared element in both these regions? Their emptiness.

Not literally, of course. Both massive areas (one a region the other a continent) are filled with a rich diversity of peoples, cultures, seasons, animals, plants, geological formations. But this diversity is not often represented in popular media, and in both the Arctic and Africa, this perception of "emptiness" grows from historically colonial modes of representation. Just as early colonial representations of Africa as a wild jungle—a space to be explored and conquered by European super powers—"the North" was similarly constructed, ideologically and physically.

During the scramble for Africa, the continent was split up among European countries, many of whom hadn't the slightest idea what the geographic terrain was actually like, or where certain tribes held land. This is indicated by the proliferation of straight border lines, some of which have since become more wandering, and many still maintained. Similarly, Canada's borders are defined by its straight lines (nationally and provincially) that neatly bisect peoples and bioregions. These lines are made possible by the colonial imaginary that envisions these spaces as empty—or, if populated, only by large impressive animals that can be shot and mounted. "The North" as a fantasy comes straight out of these colonial origins, much in the same manner as the imaginary "Africa" as a cohesive whole, represented by a larger-than-life setting sun as backdrop to the silhouette of a spindly tree and an iconic mega fauna.

This comparison is not erroneous, nor should it be dismissed in light of a post-colonial era—an era which we often want to pre-emptively celebrate, despite the reverberations of colonial legacy that continue to echo in the Americas. In fact, linguistically, there are clear connections, several of which are mentioned in King Ruel's article such as the "great scramble for the Arctic" and the "Arctic Five"[7]. While the 'great scramble' is overt, the "Arctic Five" is perhaps less so. While King Ruel uses the phrase "Arctic Five" to reference the major international players in the circumpolar region, this phrase is more commonly associated as an adaptation of the Big Five in Africa. Coined by colonial hunters determined to bring back the most impressive game, the Big Five refers to the African lion, African elephant, Cape buffalo, African Leopard, and either the White or Black rhinoceros. To collect all of the five is to prove one's worthiness as a hunter and

outdoorsman. Feeding into the same European hunting fervor comes the Arctic's own Big Five, including the walrus, caribou, musk ox, whale, and polar bear. Although the hunting of these animals is under contestation, photo safaris are becoming increasingly popular today so that now the word 'safari' is just as likely to come up in the circumpolar region as it is in central Africa.

Apart from the now-iconic mega fauna, the current advertising scheme to lure explorers, tourists, and imaginations to "the North" depends on the idealistic construction of the landscape. The fantasy of "the North" takes on another common colonial trope—the feminine vista waiting to be penetrated by the manly adventurer. As Lisa Chalykoff describes the tropes of the genre in the forward to Geoff Kavanagh's play *Ditch*,

> …within this narrative schema, protagonists are represented typically as rational agents of the highest order and of the highest rank; they are shining examples of the European male at his peak of physical endurance and emotional invulnerability. Though such men invariably encounter dangers, these challenges are overcome with equal predictability … the only desire acknowledged typically by such heroes is that which draws them upward and onward towards terra incognita. And given that such lands are frequently gendered as feminine, even this desire is rendered heterosexual.[8]

Terra incognita captured not only the hearts of the explorers themselves as they trudged onwards to increasingly inhospitable locations but also the minds of the waiting public back in "civilization." In order to fund expeditions, propaganda in the form of paintings and journals were hot commodities for harnessing the mother country's imagination and gaining their support financially. Just as Stanley and Livingstone became famous

7. King Ruel, 828, 831.

8. Lisa Chalykoff, "Introduction to *Ditch*," *Staging the North: Twelve Canadian Plays*. (Toronto: Playwrights Canada Press, 1999), 137.

for their descriptions of the African interior (the dark heart, as it was constructed at the time), the explorers of the Arctic became the visionaries of "the North," and their descriptions appealed both to the romanticism of adventure as well as the realities of the harsh conditions. In reference to the search for the Northwest Passage, Kolbert writes:

> It is sometimes suggested that this search was motivated by commerce and sometimes by nationalism. But neither force seems quite adequate; as the historical Glyn Williams has observed, the quest "became almost mystical in nature, beyond reasonable explanation.[9]

By activating both the sentimental and the thrilling aspects of the unknown landscape, the explorers appealed to the public's imaginary in unprecedented ways. Because of the nationalistic impetus for many explorers, they had to additionally appeal to their country's ideology to fund the trek, but rather than clearly relying on nationalistic tropes, the mystical construction of the Northern "quest" created something far more powerful in the public's psyche. This, in hand with nationalism, is a powerfully persuasive duo.

In the early 1900's, still situated amongst the excitement of Artic explorers such as American Robert Peary (who claimed to have reached the North Pole in 1909) and Knud Rasmussen (completed the fifth Thule Expedition in 1924 by travelling 20,000 miles on dogslead from Greenland to Siberia[10]), images and accounts of the Arctic began to be rendered more solidly within the bounds of Canadian nationalism (rather than, say, British or American nationalism). The Group of Seven, a collection of landscape painters working from 1920-33, initiated the first major Canadian national art movement[11]. The

members of the group traveled across Canada in order to paint the country, in some cases, such as the Arctic, they were the first European descendants to ever paint the landscape (aside from some painters on Royal Navy expeditions) and therefore their productions were the defining representations of "the North" in Canadian iconography. The artists themselves became explorers—adventurers at a time in history when the fervor of Arctic exploration was in full swing. A dangerous journey, these stories of exploration were being relayed back to eagerly waiting publics in North America and Europe, whose imaginations were held fast by a frozen wilderness. At the same time these paintings received wide acclaim in North America and Europe, concretizing the setting of such rousing accounts. Not only did they imaginatively set the stage for the sentimental and horrific tales of adventure and exploration, they additionally stamped Canadian nationalism on the project, and therefore, the terra incognita that they represented on canvas.

Although the landscape paintings are formidable in and of themselves, they are also symbols of Canada moving into a concretized national imaginary founded on its geographic and natural beauties. Group of Seven paintings are now heavily commercialized on mugs and t-shirts, and Canadian students are taught about them in history classes. "The North," defined artistically by artists such as Lawren S. Harris comes into being through a specific color palate, with the blues and whites of ice and snow defining the area. Gentle flowing lines, giving a cool and frozen impression[12]. Not much of the harsh north is present, although perhaps its emptiness belies this idea.

These artistic examples are not frozen in history, as it were, but rather continue

9. Kolbert, 2.
10. Ibid., 205.
11. "The Group of Seven and the Art Gallery of Ontario: Past, Present and Future," (Toronto: *Art Gallery of Ontario*, 2005) accessed on 11 December 2014.

12. Lawren S. Harris, "Lake and Mountains," 1928, Oil on canvas,

to define and inform Canadian nationalism through the media used to advertise the Vancouver Olympic Winter Games in 2010. In an advertising campaign launched by the Canadian Design Resource's Leo Obstbaum, there are athletes foregrounded on an abstract and flowing landscape comprised of blues, greens, fading into white[13]. This design had a specific construction, palette, and images that were then applied to backdrops for the sports themselves so that the photos of the athletes mimicked the poster renditions almost exactly. The superimposed athlete on the Group of Seven inspired landscape of an ambient "North" references the Canadian nationalism that the landscape painting style implied as well as the excitement and mesmerizing era of Arctic exploration. The coloured patterns in the landscape hold clues as to the location, sometimes with faint outlines of Vancouver buildings or other iconic structures. Interestingly, no matter which sport is represented, there is always a tree in the background. A wide variety are included as silhouettes, some clearly pine or spruce, and another more vaguely deciduous, perhaps maple. All of these trees hold significance in Canadian regionalism, none so much as the maple. However, if the deciduous silhouettes are maples, it is left ambiguous by an absence of leaves which are the iconic Canadian symbol. Instead what is more immediately semiotically readable are northern icons: the pine, the spruce, the coniferous. Semiotically, these images tell a narrative of how Canada is being portrayed as foremost an apolitical "Northern" location before grounding itself in the recognizably nationalistic. Structurally, this arranges an apolitical arctic within a Canadian nationalist construct, so even when the images could easily apply to another circumpolar country, there is never any doubt that the Olympic host is Canada. Perhaps this is to situate

the 2010 games within Canadian readability. More likely, it is placing Canada and the Winter Games in a semiotics of explorers, conquers of the harsh, unforgiving wilderness that is associated with "the North" as represented. If Canada is "the North", and "the North" is tough and fierce physicality associated with Arctic exploration, then Canada is the perfect host for the Winter Olympics. But in order to really unpack the legacy of the dangerous and fierce north that I allude to—those qualities that have benefitted the construction of a Canadian identity in winter sports and Arctic sovereignty—we must look at an alternative imaginary which is as equally influential in the construction of "the North."

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There are strange things done in the midnight sun
By the men who moil for gold;
The Arctic trails have their secret tales
That would make your blood run cold [14]

Now that the Arctic has been established as a fantastic imaginary as well as a geographic and political region, there is an alternative form of sentimentality in its construction that needs to be unpacked. While I have thus far analyzed the construction of "The North" as a shining expanse, with icy vistas and impressively charismatic mega fauna, there is another construction of "the North" that contributes just as much to Canadian nationalism, if not more: the horror of the Arctic.

One doesn't have to look far to find instances in history and fiction of the Arctic as a realm of nightmarish accounts of starvation, lost trails, cannibalism, murder, and even the

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13. Leo Obstbaum's Vancouver 2010 Olympic Advertisements "RIP Leo Obstbaum," *The CDR* (Canadian Design Resource, 2009), accessed 11 December 2012.

14. Robert Service, "The Cremation of Sam McGee" *The Best of Robert Service* (Toronto: McGraw-Hill Ryerson Ltd., 1940), 16.

supernatural. Many well-known Arctic writers heavily emphasized the hellish conditions in order to both portray accurately the struggles they were up against as well as pandering to an English audience that lapped up the thrilling accounts. In her introduction to *The Ends Of The Earth*, Kolbert explains that the high number of Arctic narratives by outsiders to the region reflects the "fact that those who have been drawn to the area have, to an astonishing degree, felt compelled to record their impressions" and that "for a writer, the image is reversible, so that the blank page—and all its terrors—can also become a metaphor for the ice"[15]. James Clark Ross, Sir John Franklin, Robert Peary and dozens of now iconic explorers of the Arctic region were made famous by exploration which they themselves narrated in journals and logs. As they explored, they narratively constructed the region in their accounts—an act that is reminiscent of aborigine songlines where the walker sings the world into being as they travel (a colonial bastardization in this instance). The explorer was the link to the imagination of the English public, and unsurprisingly, the more thrilling and horrifying the tale, the more captivated the audience. This isn't to say that the accounts were not horrifying in reality—they most certainly were—but it is undeniable that the construction of "the North" became entwined with the sentimental and horrific in ways through this narrative process that we see still echoing in Canadian nationalism today.

Consider, for example, a novel that has become the hallmark of the horror genre: Mary Shelley's *Frankenstein*. While often boiled down to the monstrous creation, examinations of the novel often omit or dismiss the setting of the framing epistolary narrative: Robert Walton, a failed writer attempting an expedition to the North Pole. The story of Dr. Frankenstein and his horrific creation are relayed to us by Walton's letters to his sister—an epistolary framework popular at the time in fiction as well as in journalism about Arctic expeditions. At the beginning of the novel, Walton writes "I try in vain to be persuaded that the pole is the seat of frost and desolation; it ever presents itself to my imagination as the region of beauty and delight"[16]. This appeal of the delightful Arctic transforms by the end of the novel with Walton's repeated descriptions of the trapped vessel in the ice: "We are still surrounded by mountains of ice, still in imminent danger of being crushed in their conflict. The cold is excessive, and many of my unfortunate comrades have already found a grave amidst this scene of desolation"[17]. As the plot of the novel unravels into the horror narrative we are now extremely familiar with, the beauty of the Arctic deconstructs into a fearful landscape that not only threatens the lives of the explorers, but harbors the monstrous as well. Far from being an unusual construct, this narrative structure of the arctic as a location of beauty and horror is a repeating trope worthy of consideration.

Noël Carroll's *The Philosophy of Horror* spends a great amount of time examining what he terms Art Horror which "is meant to refer to the product of a genre that crystalized, speaking very roughly, around the time of the publication of *Frankenstein*—give or take fifty years"[18]. While he hardly mentions the setting of the Arctic or tropes of "the North," he does offer that

> [t]he onset of the monster begins the horror tale proper, though, of course, the onset of the monster may be preceded in the narrative by some

15. Kolbert, 2.
16. Mary Shelley, *Frankenstein, or, The Modern Prometheus* (London: Penguin Books Ltd., 2007), 13.
17. Ibid., 206.
18. Noël Carroll's *The Philosophy of Horror: Or, Paradoxes of the Heart* (New York: Routledge, 1990), 13.

establishing scenes that introduce us to the human characters and their locales, and perhaps to their horror relevant occupations, e.g., they're Arctic explorers or germwarfare researchers.[19]

Carroll never again mentions the circumpolar expeditions in his book, so it is interesting that he chooses to include Arctic explorers in a list intended to automatically signify that something monstrous is afoot. It is evident, therefore, that there is something to the Arctic explorer that has been devised in the public imagination to be automatically horror inducing, as much as any other association (adventure, romance, etc.). Given the era when *Frankenstein* was written and Carroll cites Art Horror as crystalizing, Arctic exploration (and the public's consumption of it) was in full swing, therefore setting the tone for the genre that combined romanticism, gothic aesthetic, and adventure. Even though we might not automatically associate the Arctic with this genre today, we must accept that at the time of its conception (if we agree with Carroll's theory) the Arctic was a powerfully influential imaginary because of its horror.

While Carroll argues that monsters of the horror genre are interstitial in that they are simultaneously living and dead (thus making them monstrous), one could argue that the lost explorer occupies a similar space because of his ambiguous fate[20]. The explorer, while heroic, adventurous, and awe inspiring, is also narratively . omed to suffer in ways that enhance the horror genre previously discussed. Even modern Arctic thrillers like *The Grey*, directed by Joe Carnahan in 2012, where the survivor-protagonist played by Liam Neeson is plane wrecked in Alaska, offers only an ambiguous conclusion so that even after every other character has gruesomely succumbed to the monstrous wolves,

19. Ibid., 99.
20. Carroll, 32.

we remain unsure as to Neeson's fate. The final shot of Neeson laying on the breathing belly of the alpha wolf prompts the viewer to ask which of the two is alive, and if, should the victor be Neeson, whether he will survive much longer[21]. In the Man versus Nature formula, it is evident that nature easily becomes monstrous, whether that is the harsh below freezing temperatures or the contemptible misrepresentations of wolves in *The Grey*. The fate of the protagonist must always be under threat in order for the suspense and dread to take effect; the phrase "dead man walking" comes easily to mind. Sadly, while I've previously cited Solomon's definition of sentimentality being a "precondition for ethical engagement rather than being an obstacle" it appears that within the horror genre, the manipulation of the viewer for desired effect can obstruct ethical engagement[22]. Where sentimentality might provoke ethical behaviour in a positivist light, in *The Grey's* representation of wolves the sentimental attachment to the survivor narrative creates a damaging and demonizing construct of wolves that is not based on any biological or scientific truth. In making the wolf monstrous for the sake of the Art Horror and our sentimental attachment to the protagonist, years of ethical engagement with northern wildlife populations is undone.

The monstrous is not always fictive as in the cases of Frankenstein's creation or the larger than life demon wolves of *The Grey*. Sometimes the all too real becomes monstrous because of destabilizing of sentimental constructs like morality or righteousness.

In the dramatic anthology *Staging the North*, the (originally radio) play *Terror and Erebus*, by Canadian playwright Gwendolyn MacEwan, chronicles the search for the

21. *The Grey*, Film, directed by Joe Carnahan (2011; Los Angeles: Universal Studios Home Entertainment, 2012.), DVD.
22. Solomon, 4.

lost Franklin expedition by Knud Rasmussen, with historical characters Rasmussen, Sir John Franklin, Francis Crozier, and 'Eskimo' guide Qaqortingneq. The title, *Terror and Erebus*, refers to names of the two expedition vessels that, once locked in the ice of the Northwest Passage, doomed their occupants to slow, painful deaths. The ship's names are worth emphasizing briefly considering their own etymological connections to both the horror genre and Hell (Erebus being a region of the underworld in Greek mythology, as well as a titan—often interchangeable with Tartarus). Whomever christened these ships shared a painful irony in the fates of the expedition, although the lasting allure of the expedition was surely heightened by the lost vessels' names. After all, who could resist publishing the thrilling tale of the search for the *HMS Terror*? Particularly when the captain of the expedition was none other than Sir John Franklin who, in a previous failed expedition, "had suffered like no other Northwest Passage adventurer before him… [and] [t]he British public loved him for it"[23]. In fact, the public opinion was so expectant of a long and arduous account of the Erebus and Terror expedition that

> When Franklin sailed off with the *Erebus* and the *Terror* in May 1845, fully equipped and with several years' provisions, the public expected him to return with a hard-luck tale at the very least. But once the ships had entered the depths of the Arctic they were never seen again. Back in Britain, everybody was initially so unconcerned that serious consideration was not given to a rescue mission until 1848.[24]

In the three years that it took for a rescue mission to be mounted, the devastating events that comprise MacEwan's play took place, making it an expedition that for Franklin "ensure[d] his immortality and enduring popularity with the British public but also …

23. Jon Balchin, Explorers: Journeys to the Ends of the Earth (London: Arcturus Publishing Ltd., 2014), 206.
24. Balchin, 208.

cost him his life, together with those of all the crews of the two ships"[25].

In the play "*Terror and Erebus*[, …] MacEwan explores the interior boundaries of the possible and permissible in the human mind, and their echo in action"[26]. The characters each poetically describe in verse the events of the three years the captains and crew survived before succumbing to death, offering their own impressions of the tragic and horrific expedition. References to the blood stained ice, the frigid cold, and unforgiving passage of time that brought with it death upon death litter the play, along with mentions of the expedition's disintegration (in terms of its progress and the dispersion of expedition members as they roamed the area). As Crozier says "We scattered our instruments behind us/and left them where they fell/Like pieces of our bodies, like limbs/We no longer had need for;/we walked on and dropped them"[27]. It was these clues—the bodies, fragments of letters, instruments, etc.—that told the story of the lost expedition, put together piece by gruesome piece.

Notably, and in keeping with the horror genre, MacEwan includes hints of more sinister behavior when a recitation of the Lord's Prayer by Crozier is interspersed with ominous descriptions of the starving, dying men: "Though all our senses fall apart/we still must eat./ Give us this day our daily bread and forgive us/The kind of bread and blood and meat we've tasted"[28]. Alluding to cannibalism—something that had already occurred in the earlier failed expedition that had gained Franklin the admiration of the British public—within the framework of the Lord's Prayer perverts and heightens the

25. Ibid., 208.
26. Eve D'Aeth, "Introduction to *Terror and Erebus*," *Staging the North: Twelve Canadian Plays* (Toronto: Playwrights of Canada Press, 1999) 119.
27. Gwendolyn MacEwan, *Terror and Erebus*, *Staging the North: Twelve Canadian Plays* (Toronto: Playwrights of Canada Press, 1999) 130.
28. MacEwan, 128. Original emphasis.

horror of the act. With the added fact that the cannibalism that is not directly addressed but merely implied within a framework that clearly constructs it as evil, the romanticism of survival is injected with the horror of what that actually entails. Just as the horrifying details of the lost expeditions came to the waiting public in the forms of discovered frozen bodies and stone cairns with fragments of journals describing the grisly events, the fleeting images and Art Horror implications of the deaths in MacEwan's play offer a dramatic and sentimental insight as to how the event was depicted in the media of the time.

Combining the fictive with the realistic, Robert Service, the British-Canadian 'bard of the Yukon,' wrote poetry about the Arctic region and the Yukon gold rush, most famously, "The Cremation of Sam McGee". While this poem is a fictional and fantastical account of two Arctic travelers, it is a direct play on the conventions of the Arctic explorer travelogue (as non-fiction) and the horror genre (as fiction). Where *Frankenstein*'s creation and *The Grey*'**s** wolves are obviously fantastical monsters that live within a fictional world we know to be fake by the rules of the Art Horror genre, the monstrous in "The Cremation of Sam McGee" takes on the horror of the more concrete dead body. In the poem, Sam McGee is a prospector from Tennessee that would "sooner live in hell" than the frigid Yukon, thus immediately constructing the Yukon as a location worse than hell. With McGee's last breathe, he elicits a promise from the narrator to find a way to cremate McGee so that he will be warm once more, a challenging feat in a frozen wasteland. Most bodies lost in the Arctic are preserved by the sub-zero temperatures, "demonstrating the cold, hard truth that in the Arctic nothing is ever really lost"[29]. Of

course, in Service's poem, this frozen preservation is constructed through Art Horror to be a purgatorial fate somehow worse than death for McGee.

The discovery of dead bodies often remained after failed expeditions as grisly trail markers for the living, a fact the audience would have been sadly familiar with, so the act of cremation was not only unusual, but a heroic and sentimental kindness in its own way. The frozen body, like the monstrous body, "elicit[s] disgust from fictional characters, and, in turn, [is] supposed to elicit a congruent response from the audience"[30]. Far from being a natural construction, the notion of the frozen body as an object of horror or disgust is a particularly European idea produced by the enthralling-yet-disturbing results of lost explorers being recovered too late. Knud Rasmussen, a Danish-Inuit explorer and anthropologist, has a novel, *Across the Arctic America*, in which he describes the discovery of an Inuit woman's frozen body that had gone missing the winter before. He argues that

> [t]here was nothing repulsive in the sight; she just lay there, with limbs extended, and an expression of unspeakable weariness on her face. It was plain to see that she had walked on and on, struggling against the blizzard till she could go no farther, and sank, exhausted, while the snow swiftly covered her, leaving no trace. The body was left lying there as it was; no one touched it.[31]

In this account, there is no fear or disgust constructed—in fact, it is the exact opposite. Rasmussen's narrative emphasizes the lack of horror in the situation, and, in doing so, the very mundane nature of death by freezing as understood by many indigenous Arctic peoples. This story offers an alternative that does not see the frozen body as monstrous, just

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29. Kolbert, 3.

30. Carroll, 54.
31. Knud Rasmussen. "Songs of the Inuit from *Across Arctic America* (1927)," *The Ends of the Earth: An Anthology of the Finest Writing on the Arctic and the Antarctic*, Ed. Elizabeth Kolbert. (New York: Bloomsbury USA, 2007.), 80-1.

human. It offers a regional perspective that sees the frozen body as just as unremarkable as death by the common cold would have been a British reader. In Service's poem, the frozen body is sensationalized as horrific, inhumane, immoral and cruel. In Rasmussen's account it is unfortunate, but neither the body itself nor its location is an object of terror.

The consequent stanzas in "The Cremation of Sam McGee" follow the narrator as he sleds about the icy wasteland with the dead body growing heavier and heavier, eerily grinning at him, until finally, on Lake Lebarge he finds the remnants of an old boat and cremates McGee. In the final moments, the narrator, struck with terror, peeps into the boat only to be reprimanded by the burning body: "please close that door./ It's fine in here, but I greatly fear you'll let in the cold and storm"[32]. Humorous and horrific at the same time, the speaking dead body of McGee gets the last word in the narrativized portion of the poem which then ends with the now-iconic framing stanza (a portion of which began this section of the essay).

While polar opposites (forgive the pun) of the fantastic and the horrific constructions of "the North" as a region standing in for Canadian nationalism appear at first to be as distant from one another as any dichotomy, it is evident that the positive fantasy of the Canadian North is *dependent* on the horrific, and that these two sentimental approaches to the same region are what make it potently nationalistic.

The Royal Canadian Mounted Police (RCMP) has long been icons and stereotypes of Canadian nationalism, contributing to the sentimental romance of the Mountie in various melodramatic ways. However, at the heritage center in Regina, Saskatchewan, they draw clear connections between the romance of the Mountie and the horror of the Arctic explorer narrative in their accounts of RCMP missions in northern regions.

The "Protecting the North" exhibit at the RCMP Heritage Museum is particularly captivating as they not only include detailed and informative displays of expeditions and missions, but also have audio recordings of travelogues being read aloud. In small alcoves, visitors can peruse the documents and listen to the dramatized journals of the Lost Patrol as they became increasingly desperate, or the crew of the St. Roch as it travels through the Northwest Passage, or even the thrilling manhunt for Albert Johnson, "the fugitive 'Mad Trapper of Rat River'"[33] (RCMP website). In these accounts, the narrative tropes of the Arctic exploration era collide with the Canadian nationalism of the Mounted Police and create a shining hero to stand strong against the Art Horror background of "the North". In other words, for the Mountie to even exist as a sentimental hero that panders to Canadian nationalism and American stereotype, he has to have first been constructed as a legitimate hero in the face of a dangerous North. Without the foundation of "the North" in the public imagination as a dangerous and horrifying terrain, the Mountie could not stand in as the saviour of this expanse. And if we assume the Mountie to represent Canada nationally, then the strength of Canada's identity as "northerners" assumes that we, like the explorer and the Mountie, have conquered the horrific. In a colonial tradition, the shining fantasy of "the North" only exists because we transformed it by survival, as popularized in the Northern survival genre. And the use of the Mountie puts a particularly Canadian stamp on these otherwise multinational expeditions and narrative forms.

So how do we get from the 'Arctic Trail's Secret Tales' to the 'True North Strong

32. Service, 19.

33. "Protecting the North," *RCMP Heritage Center* (RCMP Heritage Center 2014), accessed 12 December 2014

and Free'? Canadian nationalism and the depictions of "the North" go hand in hand so frequently that distinguishing the process of this association is a feat in and of itself. Yet in the effort of discovering this correlation, it is at least apparent that the ways in which space is created sentimentally—whether that is romanticized or terrifying—explains the legacy of the northerner as an object and position of admiration. The now stereotypical fantasy of "the North" which feeds the international impression of Canada as a hardy (if silly) nation arose from a far more terrifying backdrop of exploration and danger. To identify as being from "the North" is to connect with all of these legacies: the idealized and the Art Horror, both of which stem from colonial roots. However, in each of the sentimental constructions of "the North," the Arctic remains a fantastic imaginary that obscures the realities of the region, particularly as it is now affected by climate change. The environmental politics of "the North" are obfuscated in the flowing lines of an ambiguous Arctic-scape. To continue to identify with this heritage is to accept the charge of sentimentalism as a real construct with real effects, as well as the duty to negotiate its potential in ethical engagement. If not, the fantasy of the "the North" will begin to morph into a new and ecologically horrifying reality.

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Sue Matheson
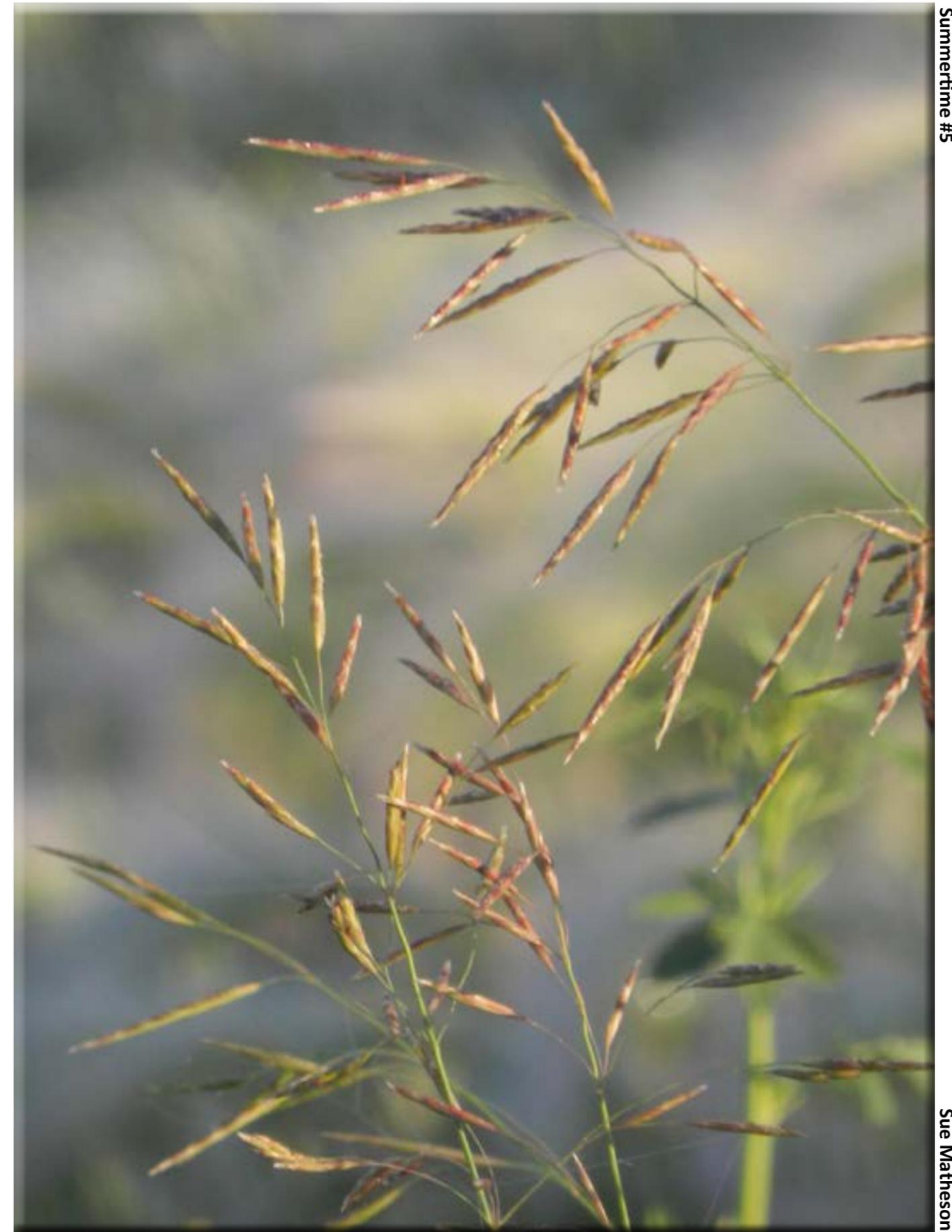
How Fighting Games Help Enable Student/Players to Imagine and Investigate Narrative

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New York, New York

"Our lives are ceaselessly intertwined with narrative, with the stories that we tell and hear told, those we dream or imagine or would like to tell…" (Brooks 3)

Introduction

Modern students live in a world surrounded by narrative, and spend much of their time unconsciously dissecting it. Despite this, students often attach a stark contrast between the narratives they encounter in their personal lives to those taught in their classes. Much of an English professor's time can center on bridging the gap between these narratives. Modern video games offer tremendous narrative experiences, with a level of interaction not found in written works or movies. However, much like movies, the games present the narrative instead of allowing for exploration of it. Older video games—fighting games in particular—can help illustrate how narrative structure is as much a creation in the reader's/viewer's/player's mind as it is a product of literal dissection. Players of these games become immersed in the story surrounding them, often unknowingly, yet their experience translates to a literature classroom discussion about narrative. The experience can help students cultivate their curiosity and hone their skills in investigating stories. In short, they develop an ability to imagine narratives from the cues in the games they play. Later, they investigate these stories out of curiosity, much like we want them to do with stories they read for class.

James Paul Gee's assertion that video games inform on student literacy has become more accepted recently. The existence of its debate only attests to its status, and the 'gamification' of classrooms pushes forward. (Checkley) Video games often contain narrative elements that rival movies and novels from 1994 (Rothstein) to 2004 (Jenkins) to 2016 (Zarzycki) and, for many students, they are the main medium with which they engage in such narrative. Selfe says "Literacy alone is no longer our business. Literacy and technology are. Or so they must become." With so many students coming to the classroom with a decade or so of video game experience, we have a rich resource to tap into and increase engagement in the classroom, and a way to incorporate new technologies. As Lacasa, et al (2008) state, new ways of teaching and learning need to be explored that enable children and adults to be active learners, capable of creating new knowledge by using the tools that they use in their everyday lives." (342) They add, "Video gaming is an essential element around which different educational situations have been organized." (343) Students play games, and this medium can offer several new ways to teach, in this case, imagination and investigation of narrative.

Most of the focus recently has been on games that put narrative at the center (Nietzel) (Jenkins); games like *The Last of Us, Skyrim, Fallout 4,* and *Grand Theft Auto.*

These games serve as great examples of video game narrative, and offer engaging scenes that elicit emotional responses akin to some of the best movies. Despite some lamentations of the limitations of video games as a narrative medium, specifically Maxwell Neely-Cohen's work or Jesper Juul's students easily recognize video game narrative. Given Neely-Cohen's point that the most popular games suffer from the "same tired patterns of gameplay and storytelling with little real innovation aside from 3D graphical improvements and the ever-evolving appropriations of Hollywood cliché," (Neely-Cohen) it may be difficult to teach video games as a narrative medium on their own. Juul states that, "Computer games are a bit harder to place in the above definition of a text, since they do "pass by", and are not identical every time they are played." (Juul 27) These inherent problems indeed exist, yet fighting games can offer teachable elements of narrative while bypassing the difficulties many researches have noted. These games can serve as a gateway to the dissection and imagination of narrative. Through the direct imagining of narrative by players, fighting games can serve as a starting point for teaching the elements of story.

Gee argues for the social aspect of being a 'gamer' and to take in all the resources that exist, including websites, 'FAQ's', and, importantly, other gamers. (Gee 8) This aligns quite well with Brooks' assertion that, "Narrative may be a special ability or competence that…when mastered, allows us to summarize and retransmit narratives in other words…to transfer them into other media…" (Brooks 3-4) Because of the cryptic hints at a larger narrative beyond the scope of many of these fighting games, players first imagine the narrative on their own and then are encouraged to seek out these other resources, mainly Wikis, to discover the histories between some characters that come through in quick dialog in the game, or to seek out the motivation for some that is briefly mentioned on screen. The narrative of such video games comes from player interest in the backstory, an intellectual and imaginative curiosity sparked by the games and realized through exploration and creation. This process transfers to student writing, as they recall the experience and attempt to recreate it in their own work.

The genre of the fighting game has been around since the mid-1980's, starting with games like *Karate Champ* and *Kung-Fu Master*, the latter detailing its story in a cut scene shown on screen when no one was playing (called an attraction scene) and another when the game first begins. The story follows classic video game formula; a girl is held captive and the player must rescue her from the evil minions. Many of the games of the 1980's followed suit, with implied narrative that players digested without much thinking. Somewhere in the 1990's, this flimsy concept expanded, with games like *Street Fighter* and *Mortal Kombat*. A great competition, held every year, draws fighters from all over the world, each with their own backstory and purpose to fight. Some characters have histories with others, leading to branching story arcs the player becomes familiar with, albeit the experience feels side-loaded. *Street Fighter* belongs to a cadre of Japanese fighting games, which for this paper will include *King of Fighters* and *Fatal Fury*. *Mortal Kombat* takes on an American flavor, and is joined by *Soul Calibur*. Through an analysis of the story, players can learn much about the cultures they depict and were created within. Not only can student players learn to engage in narrative, they can also gain a better understanding how to write about culture.

A Brief History

Though not always obvious at first glance, almost all videogames have stories. In the early days of gaming—the 1970's and 80's—the narrative did not play out on the screen. Often games expressed their story on the cover art or, in arcades, the graphics on the side of the cabinet. This narrative carried on through players' discussion and reckoning, oftentimes ending in completely speculative histories of characters. Mario, of *Super Mario Bros.* fame, got his start in *Donkey Kong,* and although his story has been fleshed out over decades, players of the original arcade did not know him as Mario, but 'Jumpman' and had to make guesses as to what his intentions were. While waiting in line to play next, arcade-goers spent time on this narrative speculation, with only the action on the screen and the art on the side of the cabinet to go on. This happened with several games of this time, where the computers used to create them had barely enough power to produce the paltry graphics and sound to also incorporate a clear story, even though, in the creators' minds, these stories existed. A student writer does not want his or her reader to mimic this experience with their work. Much like Instagram exercises in class, where students attempt to interpret the intended meaning of the poster, looking at cabinet art remains a speculative experience. Students enjoy this aspect of investigating narrative, but they want to ensure they present the messages in their own writing more clearly than what *Donkey Kong's* cabinet art says about the protagonist of the game.

Early computer games relied on the manual to tell the story. Computer roleplaying games (CRPGs) offered some of the first truly narrative experiences in games. One landmark game, *Wizardry,* released in 1981, had a forty-page manual which offered background as to why the player will enter this dungeon. The narrative plays out during the game, albeit almost completely in the player's head. Other games in the genre followed with similar stories, building off the tabletop *Dungeons and Dragons* games, where players spoke with each other and narrated on the fly. Much like the narrative tradition passed down verbally became written stories, CRPGs developed from these group gaming sessions around kitchen tables across the country and the world. This narrative exercise played out differently across the genres of video games, and fighting games borrowed from this with a sense of inferred narrative. Born in arcades, they didn't have manuals to work with, or a verbal tradition. But, they would develop one, as mentioned earlier.

The first fighting games date to the late 1970's, but for the purposes here, only games with a distinct narrative element apply. In that case, 1985's *Yie Ar Kung-Fu* is the first to contain a roster of characters with different fighting styles and a loose story of a young fighter trying to attain the title of 'Grand Master' to honor his father. Before that, games focused on innovating gameplay or included 'throw-in' stories that centered on rescuing a captive. These early games illustrate Gee's notion of what almost all games do, in terms of literacy. "A good game teaches the player primarily how to play that game and, then, to be able to generalize to games like it." (Gee 7) From this, a game genre's popularity increases, and more advanced versions come into existence. The success of *Yie Ar Kung-Fu* brought about an entire genre of games that started with 1987's *Street Fighter* and spread with games like *King of Fighters, Mortal Kombat, Fatal Fury,* and others. These games captured the imagination of players with innovative gameplay, and cultivated that imagination with more detailed storylines. Students can look at *Yie Ar Kung-Fu*

as a simple template for writing the most basic of narratives. Often, first-year writing students struggle with format when writing personal narratives, leaving out, for instance, key information about their lives. *Yie Ar Kung-Fu* leaves much to the imagination of the reader. In class, students can discuss what they believe about the story, and the wide variety of responses clearly indicates the pitfalls of incomplete narrative. Writers surely want to leave some aspects up to the reader, but to get a concrete point across, the writer needs to offer more in the way of structure, and students can see this with the example of *Yie Ar King-Fu.*

Just as a player fleshed out the reason why they shot across space in a triangle-shaped starship in *Asteroids* or imagined what motivated Mario from *Donkey Kong,* players of early fighting games imagined why their fighter squared off against a combatant in the fictional Metro City in *Street Fighter.* The difference with fighting games, however, is that they provide enough background for players to use their imagination to seek out the entire story, and later, discover details about it either within the game or online, through numerous websites that flesh out narrative. Brooks discusses the desire for us to explore narrative when exposed to it, and this holds true for fighting games. "Our exploration so far of how plots may work and what may motivate them suggests, if not the need, at least the intellectual desirability of finding a model - a model that would provide a synthetic and comprehensive grasp of the workings of plot." (Brooks 90) When writing personal narratives, students often misunderstand the importance of plot. Because the events of their lives remain close to them, they omit the motivation behind the plot. By investigating the narratives of fighting games, discovering the background on websites

and within the games, they can see how important motivation is in moving plot forward and notice the absence of it in their own narratives.

The continued success of the games—many spanning two decades—and the large online community dedicated solely to the dissection of the narrative speak to the depth of imaginative narrative in this genre and its usability in the classroom. Though casual players, or those more concerned with competing against other human players, might not seek to explore these narratives, most players engage in the story mode and eventually want to discover more information about their favorite characters. This can translate into students investigating characters in traditional media in the literature classroom, as they discover how simple searches can lead to satisfying results for fleshing out stories. Then, whether consciously or not, a more structured form of narrative can seep into their own writing.

The 'American' games

When looking at American fighting games, the starting point must be *Mortal Kombat,* the first successful fighting game created solely by an American company. It has an extensive narrative, one that has expanded into other mediums, including movies. "Mortal Kombat didn't rely on just good looks and gore for its success. Although the intense gore was a great way to attract attention, Mortal Kombat offered another side – an often-overlooked side – that kept people coming back for more: its storyline, including the uniquely different kind of gameplay as far as the fighting system within itself." (Greeson and O'Neill) Not immediately accessible to players, after repeated plays the narrative

inevitably seeps into their consciousness and curiosity is thus aroused. Players eventually seek out the story beyond what is played out on the screen, to understand the desires and motivations of the characters they play and the enemies they face. The *Mortal Kombat* universe of games has spanned twenty-five years, with several iterations and characters. Based on Chinese mythology—with a strong implementation of Americanism—the storyline focuses on gods and Hell and the thirst for power. The game takes place over several stages, leading to a final battle with a 'boss', one which has a significant story that changes significantly for each character. Also, there are alignments within the roster of characters, some allies, some opposed, that play out throughout the game and threaded through the narrative. These all serve as entry points to the narrative, and sparked discussion in arcades, and later online.

As players engage in battle, they learn special powers of each character, both the one they play and those they fight. These powers do not just exist, but rather, have a backstory as well. Raiden, based on the Japanese thunder god Raijin. He can harness and use lightning as a weapon, among other talents. A main character in what is considered the *Mortal Kombat* canon, Raiden serves as a perfect example of how players can engage with cultural narrative while playing a fighting game. He brings Japanese mythology to the forefront of the game, and creates a curiosity among players to find out more about his story, which leads to an exploration beyond the game and into the world of Wikis created by fans and supported by the creators of the game. Often, players seek out these sites to learn more about playing a character, yet discover an entire universe of character information that helps them understand motives, cultural influences, and background information. Players can discover that Raiden is a representation of a mix between the Japanese religion Shinto and the visual depiction of a Taoist thunder god presented in Chinese temples. (Raiden (Mortal Kombat)) Visiting one of the dedicated wikis, readers can learn that Raiden, "As a god, he is used to thinking in terms of eternity rather than normal human lifespans, and so he has a radically different outlook on life. This is not to say he is incapable of understanding human values and psyches." (Raiden) The Wiki also covers periods BMK (Before Mortal Kombat) and AMK (After Mortal Kombat) which delve deeper into the story. Thus, students can also gain insight into how to incorporate their own culture into their writing in a way that makes it accessible to others. By doing so, students engage in critical thinking while playing *Mortal Kombat* and investigating its backstory. They then put this critical thinking to work in their narratives. The game makes for an excellent example while not feeling so separate from what they do in their everyday lives.

Woven throughout the *Mortal Kombat* narrative are factions and relationships. Each character has a singular and group purpose, and players quickly find out who sides with whom. It starts with a simple curiosity, such as how a character got his or her powers, or why they fight. After watching the action take place on screen, players can dive into a complex canon of story that details the history of the tournament and beyond, involving all characters. Each sequel in the game contains a different story that harkens back to earlier titles, so that, when a player gets to *Mortal Kombat X,* an entire history exists, several alliance shifts have taken place, and hours of backstory can be explored. This is akin to the complex histories that bring us to *Henry V,* or even something as

simple as *A Rose for Emily*, where a long history takes place before the first word of the story is written. The same imaginative narrative takes place in a reader's mind as it does in the player guiding Raiden through the *Mortal Kombat* tournament. Encouraging literature students to imaginatively investigate the background narrative in a short story or play is no different than a fighting game player going online and searching Wikis to discover more about their favorite (or least favorite) character. This instructs on how to create enough backstory in personal writing. Students know their own histories and the people that populate them. When writing about this, students tend to leave out the important background information on their friends and relatives. Fighting games offer such writers examples on how to do this without being heavy-handed, which makes for improved personal narratives. Those students that tend to overtell their stories can see the streamlined way to offer background as well.

Another American fighting game, *Soul Calibur,* illustrates narrative perception as well. The first game in the series, titled *Soul Edge,* released in 1995, and there have been six iterations in total. The games center on a mythical weapon, the Soul Edge Sword, whose possessor could reap the souls of those he or she fights. Originally held for twenty-five years by the dreaded pirate Cervantes de Leon, the sword takes center stage in each sequel, as a new fighter takes possession and is changed by doing so. Each fighter in the game, like *Mortal Kombat,* has special powers, and these can be enhanced when possessing the weapon. Each version of the game has a new protagonist, and the narrative is colored with their influence. *Soul Calibur* offers insight on how student writers can shape their stories by letting their own experiences and viewpoints color their narratives.

Like Raiden in *Mortal Kombat*, Siegfried stands as a representation of the narrative contained in this series. He serves as the protagonist throughout nearly all the *Soul Calibur* games. Once he gains the Soul Edge, he becomes Nightmare, a darker character, and this change sparks interest in players who want to discover not only who Siegfried was, but what he has become. Players discover a guilt-ridden past in Siegfried, a Holy Roman warrior who accidentally kills his father. After convincing himself that someone else was to blame, he seeks the Soul Edge to get revenge. (List of Soulcalibur characters) These themes of guilt and anger from the past do not differ much from what students write about in their narratives, and the game can assist students in incorporating such themes into their work. Written examples can certainly help students as well, but the seamless delivery combined with the perception of play instead of work enables games to gain a more direct path to critical thinking for students. They engage in critical thought about themes without it feeling like an assignment, or critical thinking at all. *Soul Calibur* has existed for nearly twenty years, and like *Mortal Kombat,* allows players to imagine the narrative while playing, and then investigate later. During the game, the player wonders about the origins and histories of this vast roster of characters, choosing sides and guessing about what will happen if a certain player wins the game. The narrative lingers after the game ends, and the dissection of it continues.

The Japanese Games

For most fighting game fans, the genre begins and ends with the *Street Fighter* series. The first game released in 1987 with the limited backstory like games of that time. It was 1991's *Street Fighter II: The World Warrior,* that saw the expansion of the

storylines. Where *Mortal Kombat* and *Soul Calibur* involve a more direct story, *Street Fighter* focuses on alliances and relationships. For instance, the two main characters, the Japanese Ryu and the American Ken, are best friends from childhood who trained in the same martial arts style and enter tournaments to test their skills and each other. A U.S. Marine, Guile, respects both these men, but has a mission to avenge the killing of his commander. (Streetfighter Wiki)There are several other characters with specific motives and likes and dislikes of others that make up the narrative within *Street Fighter.* Once again, students can learn the importance of motive. *Street Fighter* provides detailed character motivations, and illustrates the importance of them for narrative. Students discuss how not only actions are important, but the intention behind these actions. The discussions can transfer to their writing, where they become more aware of the necessity to allow the reader to understand character motivation.

The series offers a different angle on narrative, and students can investigate the motivations of characters to reveal a deeper story in their created narrative. *Street Fighter* also gives a glimpse into Japanese culture, and its take on American values. This cultural context includes several characters from Japan and America, along with European and South American-influenced fighters that touch on multicultural cues. Students can be shown the lessons learned both from a cultural and cultural/temporal perspective, i.e., what these games say about the Japanese and what they think of other cultures, as well as offer some insight into the early 1990's cultural standpoint. This can lead to a variety of interdisciplinary discussions, and offer students an opportunity to comment directly on the often-cartoonish depictions of different cultures, and how these depictions indicate

past attitudes.

Another Japanese fighting game series, *King of Fighters,* has a more traditional narrative background, yet one that again requires investigation from the player to be fleshed out. For starters, it melds two other Japanese series, *The Art of Fighting* and *Fatal Fury.* Both exist in the same fictional universe, and center around South Town, and the criminal elements therein. *Fatal Fury* is set in current times while the '*Art'* series reflects on the 1970s and the origins of the conflicts that currently exist. The original '*Art'* game tells the story of two young fighters (Ryo and Robert) seeking to rescue Ryo's kidnapped sister. A rich backstory involving both characters' fathers and their enemies is revealed both in the story mode of the game and through further investigation. *Fatal Fury* takes place two decades later, and shows aged versions of the *Art* characters along with three new heroes, Terry and Andy Bogard, and their karate school friend, Joe Hygashi. These three enter a martial arts tournament to avenge the death of the Bogard's father. Terry is victorious, crowned the 'King of Fighters' but must face his father's murderer, a corrupt police commissioner from *Art,* named Geese Howard. Terry emerges victorious, and the *King of Fighters* series begins.

Players do not know this backstory when playing *King of Fighters,* but several cues within the game hint at histories between characters. Mai Shiranui, one of the first female characters to exist in a fighting game, stands as one of the most popular players, and was the source for much speculation in terms of her background. The *King of Fighters* canon includes many details about her—even her age—and includes a romantic entanglement between her and Andy Bogard. This gets elaborated in the game series using pre- and

post-fighting quotes for each character, specifically when they fight someone they have a history with. Players become engaged with these narratives, which only offer hints. For instance, many of the quotes against fighters without history are general, calling a fighter out for being weak or exuding confidence in one's own skills. However, when Andy defeats Mai in one game, he says, "Mai, this is my hometown. I have to save it from the evil that waits to be released!" He mentions her by name, and characters only do this with ones they have a history with, piquing player curiosity. Mai reflects the romantic side of this in *King of Fighters '97,* as she exclaims, in battle, "Marry me, Andy!" in Japanese. Andy, in the same game, yells out, "Mai" and then places her bouquet of flowers under his jacket. To continue with the same storyline, even Andy's friend, Joe Hygashi, references Mai in several of his comments in the series. When facing Andy in battle, he asks, "Hey, how's it going, Andy? Mai still got you wrapped around her finger?" This ongoing backstory entices players to explore the narrative more, either through debate and discussion with others, or through investigation online and in other media. These common themes of relationships and romance resonate with student writers. Though superficial in the games, they illustrate a way of not writing about relationships, perhaps. Students do become interested in the relationships within the game, but often are left wanting to know more. In class discussion, this can bring about more awareness within written narratives of how to display interpersonal relationships in a way that the reader can follow clearly.

From the start of the *King of Fighters* series, players inquired about the Japanese sayings characters uttered before, during, and after battle. These quotes, when translated, reveal these character histories. One character that has existed throughout the series, Mai, is in search of ancient family scrolls that will give her insight into her family's 400-year history. The Bogards—the central characters of *KOF*--want to rid their city of crime and corruption. With a roster of dozens of characters, the series is ripe for narrative exploration both in game and out, allowing for the expansion of details involving plot, character, and setting. The series has moved forward and backward in its narrative time, offering fans deeper insight into character motivations and histories. Players have long engaged in discussion and debate about these characters and their stories, leading to several comic book series based on the game. The game series and survived and evolved over two decades, providing a rich backstory that players can investigate through the comics, television shows, and through their own imagination of the narrative.

Implementation in the Classroom

The push to incorporate digital texts has moved quickly in the last decade. Students increasingly engage with digital media and texts in the classroom as well as outside. Dr. Eileen Honan, in a 2008 study, noted the effects of digital media and texts in the classroom by saying, "these teachers would welcome an opportunity to rethink their pedagogical routines [to] help their students to make sense of the digital texts they use in their outside-school lives." (Honan) Many students play video games of some sort, with four out of five households having a game-playing device, and a total of 155 million game players in the United States, as of 2015. (Essential Facts about the Computer and Vide Game Industry: 2015 Sales, Demographic and Usage Data) In the same report, Neil Howe, a leading researcher on millennials states, "Millennials are putting [video games] at the center of their entertainment preferences…" Games have become a new

entertainment and social experience, replacing movies and television, which had once transplanted books as the entertainment norm. Students today have dissected narrative through video games from a young age, therefore it makes sense that literature professors should use this medium to help them hone their narrative-investigating skills. Much like Spivey argues that "[Readers] dismantle texts and reconfigure content they select from these sources…" (Spivey 256) so do players of fighting games when they imagine the narrative of a character as they take in the visual cues and make decisions based on what they see and previously know. This follows with Spivey's "constructivist characterization of the reading process" (258) but instead transplants it onto the playing of video games and the building of narrative in the players' and spectators' minds.

Whereas, a few decades ago, students would enter college classrooms with experience reading in their free time, now, they have an equal—if not greater—amount of experience dissecting narrative through video games. Teaching them through this medium makes complete sense because, as 6th grade teacher Michael Matera says, "This is the lens through which your students see the world." When students go to school and games are missing, "there is cognitive dissonance." (Checkley 3) The fighting games genre can work for professors both versed in gaming and not. Their simplicity in action on the screen and visual cues to backstory offer a way to incorporate new media and digital learning without heavy lifting. Using them can also encourage professors to take the next step into more involved games, thus adding more depth and variety to the standard intro to lit course.

There is not yet a compelling reason to include fighting games directly into a literature course as canonical material. Other games can play this role, albeit with noted difficulty in translation of experience; the player experience remains too singular to extrapolate across an entire classroom. However, fighting games offer an easy way to illustrate the dissection and imagination of narrative and can aid students in understanding how to unpack larger narratives, and to connect to real-world narrative experiences. Simply, the two converge in this example, as players engage in the narrative of the game while playing, and then can seek out more information to form a greater understanding of the story being told to them indirectly. They can turn a passive experience, one much like a television show or movie, into a more active form of narrative understanding through the exploration of online resources and peer speculation. They can see how their imagined narrative forms from these experiences.

Students can play a few rounds of a fighting game and then discuss what they think the background and motivation is for their chosen character. This will be based on the experience on-screen, and then enhanced by the sharing of perspectives with their peers. They first form their imaginative narrative of the character they choose on their own, through the visual cues and hints given throughout the games. They can wonder why a particular character does not like another, or why one wears a headband that says 'No Future' or other cryptic messages strewn through the backgrounds of the game while they play. They then can turn to their peers for further discussion.

Though many of these games have their own canon—movies, comic books, television shows—it is the player discussion from the 1990s that shaped the canonical narrative and created a need for background. Students can re-create this experience, this

discovery of through narrative imagination, investigation and dissection. Teachers can create prompts, perhaps through an in-class poll, asking questions like: What is this character's motivation to fight? Is this character good or evil? What character do you see as the main protagonist and why? The results can be shown on a projector in class, and then group discussion can ensue. Like the chats among arcade-goers decades ago, students can engage in a dissection of fighting game narratives through group discussion in peer groups. This begins the imaginative stage and a parallel can be drawn to how students can do the same with traditional texts. The discussions center on how the visual representations of character and the hints of story create images for players and spectators alike. Though students will align differently regarding characters and opinions on backstory, the discussions offer them an opportunity to state their view and effectively argue for it based on evidence.

Students often find the freedom to speak their opinion (they are not expected to answer to decades or centuries of literary criticism) and enjoy the outsider nature of the medium. The gamers in the class will feel more as though they better contributors, able to act as near-experts in the field, and their peers will often look to them for such information. Such students sometimes feel isolated in classrooms, yet they have a tremendous amount to offer from their rich culture and almost instinctive understanding of narrative from years of playing games and talking about them with others. We want students to engage in discussion about story, about how writers shape narrative, and these fighting games offer a smooth entryway into this practice. Professors act more as mediators than instructors, knowing possibly as much about the characters and their stories as the students do. This

can happen with stories the English instructor is unfamiliar with, but here, they likely are unfamiliar with the genre and its conventions. This way, discovery happens as a group including the professor, putting the entire class on the same level.

On the surface, this works as a 'flipped classroom' concept. The students and teacher work together instead of the teacher guiding the discussion, or even slightly directing it. However, through this discovery process, the students learn from each other, but also gain strategies of imagining and investigating narrative through the teacher's own exploration and technique. In a 2014 study on flipped classrooms, student acceptance and favorable perceptions of flipping were inversely related to the amount of preparation required for in-class discussion. (Doyle, Krupica and Vo) Because this activity happens during class time, it requires no preparation. It is also a low-stakes assignment where students rarely notice they are performing the same work they will do for traditional literature. Students with more experience with the gaming medium and story behind fighting video games can lead the class, offering them a moment where their views take center stage. This empowerment will enrich their education and encourage them to participate more often in their classes. This high-impact practice benefits students and offers them a non-traditional experience in the classroom.

Once accomplished, students are directed to research their character online. Here, they can see how their created narrative aligns with the canon. Many times, although students do not get the story 'right' they see that they've created their own, and understand where they may have deviated in their analysis. Often students correctly understand the alignment of characters, and the alliances within each game. They can see clearly who

works with who, and which characters appear to have histories with each other. This is not unlike how students can form opinions of Hamlet or Eveline, guessing at what has happened before and why characters act as they do. By encouraging students to imagine and investigate the narratives of fighting games, an instructor can illustrate the lateral move to canonical plays and stories. The students have successfully dissected the game narratives, and are ready to implement what they've learned in their own writing.

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THE PROXIMATE IMPULSE BEHIND ROMEO AND JULIET QUARTOS-DIVERGENCES: THE MARIAN THEORY

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I. INTRODUCTION

The Marian Theory is a working hypothesis of *Romeo and Juliet.* It posits that the biographies of a "Montague," Mary Wriothesley, and her husband the 2nd Earl of Southampton informed creation of that stage-tragedy. The following pages outline a Marian Theory inquiry into scarcely-scrutinized divergences between the two Quartos of *Romeo and Juliet.* Those date respectively from 1597 and 1599. (Perhaps the later-published 1599 text had been the one earlier-written. Nevertheless unprecluded would be 1599 corrections or additions producing that 1599 Second Quarto as we have it.) The

author of *Romeo and Juliet* seems so to have refashioned his work-product between the First Quarto and Second Quarto as implying some transfer of loyalty. Said transfer would run from one real-world person, represented through one of the feuding families in that tragedy, to another actual individual represented through the staged feud's counterpart clan.

For authorial sympathies seem somewhat detaching from the son-husband, Verona-Montague family (i.e., the element of the 2nd Earl of Southampton's family) in favor of the daughter-wife-widow, Verona-Capulet clan (i.e., that of England's House of Montague). Such transfer of authorial self-identification appears to have coincided with real-world events. Those developments might have made it more diplomatic than previously for any author (particularly including any disinclined to cross Henry Wriothesley, the 3rd Earl of Southampton) now to applaud the 3rd Earl's mother Mary (once-denounced by the 2nd Earl). Those developments comported with a Mary (daughter of Anthony Browne, 1st Viscount Montagu) Wriothesley-and-Henry Wriothesley personal rapprochement.

The instant inquiry proves timely. For meritorious were the respective contributions of Dr. Margarethe Jolly in her 2014 study, *The First Two Quartos of* Hamlet: *A New View of the Origins and Relationship of the Texts,*[1] and of Professor Richard Dutton in his 2016 assessment of the relationships between several plays' own earlier/later quartos, *Shakespeare, Court Dramatist.*[2] In the meantime, attention-grabbing debate from another perspective erupted over *Hamlet* quartos between the Oxford University scholar Tiffany Stern and Indiana University-Purdue University (Indianapolis) Professor Terri Bourus.[3] Such diverse academic precedents can inspire various reinvestigations of divergent quartos within the Shakespearean *corpus*.

II. A TALE OF TWO QUARTOS: 1597 TO 1599

The *Romeo and Juliet* Marian Theory looks to the stormy history of the 2nd Earl of Southampton, his spouse Mary (born Mary Browne, the 1st Viscount Montague's daughter[4]) and their son, the 3rd Earl. Their interlocking lifestories contain pre-1597 melodrama relevant to reviewing the *Romeo and Juliet* First Quarto (1597) and Second Quarto (1599). The two Quartos so plainly differ as to hint that, between their respective publications, their author's sympathies had slipped more toward the Verona-Capulet side (i.e., the English House of Montague) from the Verona-Montague side (i.e., that of the 2nd Earl of Southampton's kin): Beware confusing the respective roles of England's Montague *bride* with Verona's Montague *groom*. That change in sympathies seems simultaneous with evolving external circumstances. Those 1599 transformed facts rendered it more politic than beforehand for any playwright reluctant to offend the 3rd Earl of Southampton to laud, at last, that Earl's mother Mary.

University College London Professor of English Literature René Weis edited The

1. Margarethe Jolly, The First Two Quartos of *Hamlet*: A New View of the Origins and Relationship of the Texts (Jefferson, NC: McFarland & Company, Inc., 2014).
2. Richard Dutton, Shakespeare, Court Dramatist (New York: Oxford University Press, 2016).

3. *See, e.g.,* Tiffany Stern, *Sermons, Plays and Note-Takers:* Hamlet *Q1 as a "Noted" Text*, in 66 Shakespeare Survey, pp. 1-23 (Cambridge: Cambridge University Press, 2013); and Terri Bourus, Young Shakespeare's Young Hamlet: Print, Piracy, and Performance (History of Text Technologies) (New York: Palgrave Macmillan, 2014).
4.. Alice-Lyle Scoufos, Shakespeare's Typological Satire: A Study of the Falstaff-Oldcastle Problem, p. 225 (Athens, OH: Ohio University Press, 1979).

Arden Shakespeare *Romeo and Juliet*[5] published during 2012. The final page of Weis's edition of the playscript[6] delivers an exchange nearly identical to the First Folio.[7] Weis's rendering runs:

CAPULET O brother Montague, give me thy hand.

This is my daughter's jointure, for no more

Can I demand.

MONTAGUE But I can give thee more,

For I will raise her statue in pure gold,

That whiles Verona by that name is known,

There shall be figure at such rate be set

As that of true and faithful Juliet.[8]

Give me.

This exchange is noteworthy on two grounds: Capulet's words and Montague's reply. What is happening?

A. Capulet's Words: Between 1597 and 1599, Capulets Look Better and Better

i. *Jointure and Dowry*

a. *Dowry Distinguished from Jointure*

Weis innocently misleads by noting of jointure, the Capulet word: "The only marriage settlement Capulet can now offer is an extended hand of friendship."[9] But Weis's "offer" idea misconstrues. For in jointure-context Capulet appropriately associates his daughter's (i.e., Romeo's wife's) jointure with a Capulet demand (not offer): "give me thy hand." *Give me.* Weis's confusion is born of First Quarto and Second Quarto divergence. Northwestern University Professor Wendy Wall acknowledged of the final scene's Capulet-Montague dialogue in those two quartos respectively: "The textual difference might seem slight, for each passage concerns competitive expenditure, each ratifies the protagonists' marriage after the fact, and each asserts fatherly control in a moment of grieving chaos."[10] But beware.

Now compare Weis's passage against that in the First Quarto:

Cap.   Come, brother Mountague, give me thy hand:

There [my own hand] is my daughter's dowry; for now no more

Can I bestow on her; that's all I have.

Moun.   But I will give them more [beyond Old Capulet's dowry delivered

5. René Weis, Romeo and Juliet (London: Bloomsbury Publishing Plc, 2012) (René Weis ed.) (The Arden Shakespeare).
6. *Ibid.* p. 338.
7. Romeo and Juliet, Act V. sc. 3, lines 3170-3177; Shakespeare, William, 1564-1616. Romeo and Juliet (1623 First Folio Edition) Electronic Text Center, University of Virginia Library http://etext.virginia.edu/etcbin/toccer-new2?id=ShaRJF.sgm&images=images/ modeng&dat...
8. Romeo and Juliet, Act V, sc. 3, lines 296-302; René Weis, *supra* note 5, p. 338.

9. René Weis, *supra* note 5, p. 338 n. 297. That Capulet-Montague eloquent gesture seems discussed inexhaustively of the implications of jointure/dowry divergence. The words jointure, dowry, and marriage are absent from the Index of Sir Dunbar Plunkett's study. Dunbar Plunket, Shakespeare and the Law (New York: Houghton Mifflin Company, 1929).
10. Wendy Wall, *De-generation: Editions, Offspring, and* Romeo and Juliet, in From Performance to Print in Shakespeare's England, pp. 152, 162 (New York: Palgrave Macmillan, 2006) (Peter Holland and Stephen Orgel eds.) (Redefining British Theatre History series) (Peter Holland gen. ed.).

by wife to wedded Romeo]; I will erect

Her statue of pure gold,

That while Verona by that name is known,

There shall no statue of such price be set,

As that of Romeo's loved Juliet.[11]

Give me.

In this First Quarto handclasp of these fathers of the late bride and groom, Capulet correctly concentrates upon what he has to "bestow" symbolically: the bride-Juliet's "dowry." For as Bruce W. Young explained of that era's family life: "Before a marriage could take place, a dowry and jointure would have to be negotiated. The dowry, also called the 'portion,' was money, property, or sometimes goods provided by the family of the bride to the groom."[12] By the tragedy's close, her dowry (those effects brought into marriage by the bride Juliet to be enjoyed by her husband Romeo for duration of their marriage[13]) reduces to Capulet's sharing of his hand symbolizing friendship with Romeo's father.

Or in Wall's words: "In this exchange, Q1 Capulet initiates a penitent handshake with Montague as the marital gift bestowed on his daughter [for the bride to bring to her bridegroom] (perhaps because he feels guilty for forcing her marriage to Paris), and he freely describes himself as spent, evacuated ('that's all that I haue'). In his formulation,

Juliet becomes almost momentarily alive to receive the dowry as it transfers through her to her husband."[14] The First Quarto validates an association of Capulet's handclasp with a Capulet-family *offer*: Juliet as bride ordinarily would have brought Romeo her dowry. Capulet's hand symbolically incarnates Capulet's dowry-reference, running advantageously to the *male*.

The Second Quarto deviance from its predecessor sows complications confounding Weis. For the exchange therein reads:

> *Cap.*   O brother *Mountague*, giue me thy hand,
>
>   This is my daughters ioynture, for no more
>
>   Can I demaund.
>
> *Moun.*   But I can giue thee more [than my hand, as jointure for
>
>   widowed Juliet],
>
>   For I will raie her statue in pure gold,
>
>   That whiles *Verona* by that name is knowne,
>
>   There shall no figure at such rate be set,
>
>   As that of true and faithfull *Juliet*.[15]

Give me.

Now Capulet refers to what Capulet can "demand" (instead of "bestow"). Demand arises *not* in context of bride-Juliet's "dowry," but in context of widow-Juliet's "jointure." In this Second Quarto handclasp of erstwhile fathers-in-law, Capulet correctly

11. An Excellent Conceited Tragedie of Romeo and Juliet, Act V, sc. 3, lines 207-214; The First Quarto Edition of Shakespeare's Romeo and Juliet, p. 112 (Madison: 1924) (Frank H. Hubbard ed.) (University of Wisconsin Studies in Language and Literature, No. 19).

12. Bruce W. Young, Family Life in the Age of Shakespeare, p. 38 (Westport, CT: Greenwood Press, 2009).

13. Henry Campbell Black, Black's Law Dictionary, pp. 581 (St. Paul: West Publishing   Company, 1968) (rev. 4th ed.).

14. Wendy Wall, *supra* note 10, p. 161.

15. Romeo and Juliet, (Quarto 2, 1599) Act V, Sc. 3, lines 3172-3178; Romeo and Juliet (Quarto 2, 1599) http://internetshakespeare.uvic.ca/Library/Texts/Rom/Q2/scene/5.3.

keys communication to what the late husband Romeo's agent, *Montague* (not Capulet), has to surrender upon *demand by* the late widow Juliet's agent (Capulet). For Young instructs: "The jointure, lands or income provided by the groom or the groom's family, was intended to support the wife after her husband's death."[16] Observe the reversal from the direction of dowry declared in Quarto One. Wall notes the divergence between the pair of quartos in how the state (i.e., Prince Escalus) is presented, and appreciates emphatically how "The family reconciliation is also inflected differently in the two quartos, as Capulet describes his proffered handshake as a *dowry* in one text, a *jointure* in the other."[17]

As Wall frames the matter more specifically:

> In the text [Quarto Two] with which modern readers are familiar, however, Capulet does not offer a gift to his daughter or to Montague. He instead broaches the subject of his reconciliation by casting it as a "demand," asking his new kin for the groom's guaranteed annuity, the jointure or land held in tail for the wife upon her husband's death, expressed and cancelled as a handshake….[18]

Wall emphatically adds: "Though Capulet is generous in making the first move toward harmony, his discourse is pointedly not that of free expenditure; he figures the exchange as a *claim*, an exacting of what is due him (for going out on a limb to put aside the feud, perhaps)."[19] Having lived as a jointress-wife, Juliet as widow ordinarily would have benefited from acquisition of much of her deceased spouse's estates. Jointure, here symbolized, represents reference running symbolically favorably to the *female*.

In sum, for their First Quarto handclasp Capulet made reference to Capulet's hand signifying something *delivered to Montague* ("There [my hand] is my daughter's dowry"). Contrariwise, in this Second Quarto handclasp Capulet refers to Montague's hand signifying something *delivered to Capulet* ("This [Montague's hand] is my daughter's jointure"). In other words, men shake hands reciprocally. Yet, legally Capulet always accurately identifies either Capulet's hand (delivered to Romeo's kin) as bride-Juliet's "dowry," or else Montague's hand (delivered to Juliet's kin) as widow-Juliet's "jointure." The dowry context signals a Capulet hand making offer. The jointure context being symbolized signals a Montague hand liable to Capulet demand.

b. *Jointure in England*

Frances Gies and Joseph Gies capsulized the English legal backstory to *Romeo and Juliet*. That history distinguished jointure from not only dowry (as in *Romeo and Juliet*) but from a third device, dower:

> Late in the thirteenth century a new form of marriage contract, very favorable to the bride, was introduced in England. "Jointure" pledged joint tenancy of land by husband and wife during their lifetime, and by the survivor alone after the death of one spouse. A jointured widow might acquire most or even all of her husband's estates instead of merely the dower third. The origin of jointure is unknown, but, according to [Kenneth B.] McFarlane, "in most marriage contracts of the fourteenth and fifteenth centuries the wife was made sure of a jointure in part of her husband's lands." Jointure contributed further to the prominence of the late medieval dowager, the widowed mother who

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16. Bruce W. Young, *supra* note 12, p. 38.
17. Wendy Wall, *supra* note 10, p. 161 (italics in original).
18. *Ibid.*, p. 162.
19. *Ibid.* (italics in original).

controlled the family property…[20]

Very favorable to the bride: Jointure, instead of merely *the dower third.*

Favorable to the bride is the 1599 symbol of Montague's hand given Capulet. The picture drawn by the Gieses would be reclarified in the historic Statute of Uses[21] under King Henry VIII. The Gieses' noun contrasted to jointure (i.e., dower) is not to be confused with either jointure or dowry. The statutory law since Henry VIII had made mutually exclusive (Gieses: "instead of") the dower and jointure provisions for widows.[22]

c. *Flagging Jointure, Alone:* Give Me, Give Me

Again: Capulet's homely, both-quartos "give me thy hand" language connects with dowry during 1597. It corresponds to jointure in 1599. Yet the playwright spotlighted Capulet's choice of words when keyed to jointure, solely. The 1597 Capulet daughter's role never freighted the grieving Capulet's humdrum "give me." But the 1599 Juliet imperiled her life when she did flag her father's future phrase.

Friar Laurence in Act IV proposed Juliet's drugging, enabling encryptment in vivo. By Act V, Capulet's 1599 "give me" reached an audience mourning the Friar's miscarried tactic triggering a tragic trio of deaths. That Quarto Two audience could feel Capulet's phrase fraught. For in Quarto Two alone Juliet's scene-closing Act IV proposition-reply,

poignant in retrospect, unfolds in entirety: "Give me, give me, O, tell me not of fear!"[23] *Give me, give me.* Hence, only 1599's Capulet ("give me thy hand") hearkened his hearers to his intrepid daughter, dead.

Quaere, whether the playwright sensitized his audience antecedently ("Give me, give me") to that impending jointure remark ("give me thy hand"), because jointure constituted a pro-female, interquarto difference of which the dramatist himself proved aware through the years. *Quaere*, whether Elizabethans actually understood such terms as dowry and jointure to bear (at least in fiction) vividly or violently affirmative/negative implications, because really representing marriage market-desirability or premarital negotiating strength enjoyed respectively by bride and groom and their families. (See Appendix I.)

The Capulets and Montagues (including widowed Juliet Capulet Montague) might not be aristocrats but are wealthy. In 2017, no less a student of sixteenth-century England than Hilary Mantel reflected upon upperclass English marriage and widowhood respecting, e.g., a woman's real and personal property, trusts, entail, wardship, brokered marriage settlements, and prenuptial agreements. Mantel most particularly attached such topics' importance to overtly compliant (even while conspiratorial), self-determined, strong-willed women. (See Appendix II.) A 13 year-old girl named Juliet matured before audiences into exactly such woman during the final three days and four nights of her life. Mantel marks the mercenary background brought (by the propertied segment of *Romeo and Juliet*'s readership and audience) to the dramatist's Quartos (i.e., Quartos divided over 'dowry' and 'jointure').

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20. Frances Gies and Joseph Gies, Marriage and the Family in the Middle Ages, pp. 190-91 (New York: HarperCollins Publishers, 1989) (Perennial Library edition) (footnote omitted), citing Kenneth B. McFarlane, Nobility of Late Medieval England, p. 65 (Oxford, 1973).

21. Statute of Uses, 27 Hen. VIII, c. 10 (1536). Sir William Blackstone confirms as much. J.W. Ehrlich, Ehrlich's Blackstone, p. 198 (San Carlos, CA: Nourse Publishing Company, 1959).

22. Henry Campbell Black, *supra* note 13, p. 974, citing Jacobs v. Jacobs, 100 W. Va. 585, 131 S.E. 449, 453.

23. Romeo and Juliet, Act IV, sc. 1, line 121; Rene' Weis, *supra* note 5, p. 294. Cf. *ibid.*, p. 400 (First Quarto).

Noteworthy is the evolution from the 1597 First Quarto's Capulet context of tribute ("my daughter's dowry") with its flavor of Capulet inadequacy ("no more/Can I bestow"), to the Second Quarto's context of Capulet's nearly patronizing forgiveness of debt ("giue me thy hand,/This [in itself, alone] is my daughters ioynture") with its smack of Capulet leniency "(no more/Can I demand"). *Bestow. Demand.* Notable is the fact that only the jointure device was flagged onstage. It almost seems that between 1597 and 1599 the outlook of the playwright had tipped toward the daughter-wife-widow, Verona-Capulet side (i.e., that of the English House of Montague) from the son-husband, Verona-Montague side (i.e., the element of the 2nd Earl of Southampton's family).

ii. *The Hopeful Lady of My Earth*

Too, weigh the corresponding deepening of the 1597 First Quarto's initial Paris-Capulet Act I, scene 2 interview. That interview includes, of Juliet:

PARIS: Younger than she are happy mothers made.

CAP: But too soon matured are these so early married:

          But woo her gentle *Paris*, get her heart,….[24]

Whereas Weis records that most editions follow the First Folio and *Second* Quarto of 1599 with two lines to precede that last[25] ("but woo"):

PARI: Younger than she, are happy mothers made.

CAPU: And too soon mar'd are those so early made:

Earth hath swallowed all my hopes but she,

          She's the hopeful Lady of my earth:

          But woo….[26]

These last present the only lines in Capulet's speech (extending 22 lines from "But woo") devoid of a couplet-rhyme.[27] By insertion of his new brace of lines ("Earth…earth") the playwright flags his "earthly," almost earthy, message, poetic niceties notwithstanding. This proves reminiscent of his use of happenstance and astrological influences throughout the play notwithstanding those devices' deficiencies, literarily. (For that tactic too entailed a Marian Theory extraliterary justification.) The Marian Theory explains this inserted-brace tactic in terms of the playwright's paralleling his Capulet-Montague feud with frictions between the 3rd Earl's paternal and maternal families.[28] The Marian Theory suggests why a message-minded yet subtle 1599 playwright would rewrite invoking those definitional distinctions ("Earth…earth").

For as M. M. Mahood perceived:

Love in Verona may be a cult, a quest or a madness. Marriage is a business arrangement. Old Capulet's insistence to Paris, in the next scene, that Juliet must make her own choice, is belied by later events. Juliet is an heiress, and her father does not intend to enrich any but a husband of his own choosing:

Earth hath swallowed all my hopes but she,

24. Rene' Weis, *supra* note 5, p. 350.

25. *Ibid.*, pp. 4, 142 n. 14.

26. *The Tragedie of Romeo and Ivliet,* in Mr. Shakespeare's Comedies, Histories, & Tragedies, pp. 651, 652 (New Haven: Yale University Press, 1955) (fac. ed. prep. by Helge Kökeritz) (First Folio).

27. René Weis, *supra* note 5, p. 142 n. 14.

28. George Steven Swan, The Proximate Reason *Romeo and Juliet's* Bride Be But Thirteen: The Marian Theory, the quint: an interdisciplinary quarterly from the north, pp. 67, 96-98 and 101, vol. 9, no. 1 (December 2016) (The Pas, Manitoba).

Shees the hopefull lady of my *earth*.   (I, ii, 14-15)

This quibbling distinction between *earth* as the grave and *earth* as lands (as Steevens points out, *fille de terre* means an heiress) is confounded when Juliet's hopes of happiness end with the Capulets' tomb.[29]

Oui, fille de terre signifies heiress. It is in Quarto Two that materials with a legal connection appear prominently.[30] So dramatist definitional distinctions ("Earth… earth") here (the 1599 rewrite) underscore the fact that a prospective groom (e.g., Paris) well might contemplate the moneyed parentage of the 13 year-old prospective bride-*fille de terre*. This fresh passage seems some soft gibe at greedy grooms in extolling the high-quality of the Montagues' forthcoming Capulet-catch (Juliet). The Marian Theory understands Juliet to signify Mary, and Romeo to signify her bridegroom, the 2nd Earl of Southampton.

To reiterate, the dig develops despite cost to couplet-consistency. It is as if between the first version of this play and 1599 its author's sympathy openly had moved the more to the daughter/wife, Verona-Capulet side (i.e., that of the English House of Montague) from the son/husband, Verona-Montague side (i.e., the element of the 2nd Earl of Southampton's family).

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29. M. M. Mahood, *Romeo and Juliet*, in Essays in Shakespearean Criticism, pp. 391, 395-396 (Englewood Cliffs, NJ: Prentice Hall, Incorporated, 1970) (James L. Calverwood and Harold E. Toliver eds.) (Mahood's emphasis). Mahood immediately continues:
    …We recall the dramatic irony of this pun when Old Capulet speaks his last, moving quibble:
         O brother Mountage, giue me thy hand,
         This is my daughters ioynture, for no more
         Can I demaund.   (V.iii.296-8)
    Ibid., p. 396. *Quaere*, whether Mahood like Weis confuses jointure with dowry.
30. Lynette Hunter and Peter Lichtnenfels, Negotiating Shakespeare's Language in Romeo and Juliet, ch. 3 (Burlington, VT: Ashgate Publishing Company, 2009) (Studies in Performance and Early Modern Drama).

iii. Like Her Most Whose Merit Most Shall Be

Appraise another evolution from that 1597 First Quarto's initial Paris-Capulet Act I, scene 2 dialogue. The First Folio and Second Quarto of 1599 have Capulet invite Paris to his Sunday night feast with the temptations of fennel[31]:

> When well-appareled April on the heel
>
> Of limping winter treads, even such delight
>
> Among fresh fennel buds shall you this night
>
> Inherit at my house. Hear all, all see,
>
> And like her most whose merit most shall be;….[32]

Weis instructs: "…Durham (120) notes that 'Fennel was thrown in the path of brides, and it was especially the flower of newly married couples'."[33] A prim "fennel buds" reference reinforces respectability of any Paris-Capulet dickerings over Juliet's nuptials.

And Capulet's "fennel buds" allusion to weddings arrives only after the audience's sensitization to "bud" in its prior scene. Therein, Montague styled secretive Romeo as inscrutable "As is the bud bit with an envious worm/Ere he can spread his sweet leaves to the air, /Or dedicate his beauty to the same."[34] The ugly "worm" picture links to Romeo (mooning over Rosaline). It empowers the more welcome portrayal of well-appareled April's fresh fennel buds. The latter, charming portrait links wholesomely to Rosaline's cousin Juliet (meeting Romeo).[34]

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31. René Weis, *supra* note 5, p. 143 n. 28.
32. Romeo and Juliet, Act I, sc. 2, lines 25-30; René Weis, *supra* note 5, p. 143.
33. René Weis, *supra* note 5, p. 143 n. 28.
34. Romeo and Juliet, Act I, sc.1, lines 149-151; Rene' Weis, *supra* note 5, pp. 134-135.

Also, Juliet herself builds on Montague's "bud" and "beauty" lines in the Second Quarto (not the First). In the first balcony scene she tells Romeo: "This bud of love by summer's ripening breath/May prove a beauteous flower when next we meet."[35] Those soon to be-secretive spouses never can "spread" news of their marriage; they ever must mutually "dedicate" themselves covertly.

By contrast, Capulet's language in the *First* Quarto of 1597 named not fennel buds but scene two "female buds".[36] Of course, noted Shakespearean scholar Dr. Pauline Kieran lists 'bud' among "Pun words on female genitals."[37] Remember scene one's sexually crude and violent verbiage of Capulet retainers Samson and Gregory, in the play positively peppered with sex by Juliet's Nurse and Mercutio.[38] Consequently, Capulet's 1597 reference soon thereafter to a woman-focused, unwed man's delight among fresh female buds engenders atmosphere more lascivious, pandering or even cunnulingual than 1599's wholesome, even connubial fennel: Capulet in this very speech invites Paris to "woo" Juliet. Later, in Capulet's ultimatum to Juliet about Paris in the First Quarto (as in the Second), Capulet tells her that because "you be mine, Ile giue you to my friend:…."[39] *Pandering.*

Transition from vulgar-Freudian "female buds" into daintier "fresh fennel buds" arises as if (between the earliest version of *Romeo and Juliet* and 1599) the playwright's respect openly had shifted more to the daughter-wife/Verona-Capulet side and thus more to the side of England's clan of the 1st (b. 1528-d. 1592) and 2nd (b. 1574-d. 1629) Viscounts Montagu. It is as if the shift were from the son-husband/Verona-Montague side, and thus from the side of England's clan of the 2nd Earl of Southampton.

B. Montague's Reply: Between 1597 and 1599, Juliet Looks Better and Better

The Marian Theory could suggest identification of mutually-reinforcing explanations for several Second Quarto innovations. These innovations include: (1) Old Montague's exaltation of "true and faithful Juliet"; (2) the Second Chorus suggestion of a sort of house arrest; and (3) Juliet's ostensibly never-imagined marriage "houre".

i. True and Faithful Juliet

In Weis, as in the First Folio[40] and in the Second Quarto, Montague (the late husband's father) promises Capulet (the late bride's father) the erection in Verona of a golden statue to memorialize "true and faithful Juliet." This headily promotes Juliet from characterization as an apparent appendage of her husband: the First Quarto's "Romeo's loved Juliet." In 1597, Juliet's commemoration by Romeo's father memorializes male *Romeo*'s love-object. By 1599, her play's progenitor undertakes (through Romeo's progenitor) to *glorify a female* faithful and true. Both fathers learned Juliet proved herself a spectacularly loyal wife in gambling her life on the encryption-rescue ploy preventing

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35. Romeo and Juliet, Act II, sc. 2, lines121-122; Rene' Weis, note 5, p. 194.

36. Rene' Weis, *supra* note 5, p. 350 (Quarto One)..

37. Pauline Kieran, Filthy Shakespeare: Shakespeare's Most Outrageous Sexual Puns, p. 296 (New York: Gotham Books, 2007) (Appendix).

38. Eric Partridge, Shakespeare's Bawdy, pp. 35-36 (New York: Routledge Classics 2001, 1968) (3rd ed.) (Gregory and Samson). "*Romeo and Juliet*: Mercutio and Nurse sex-spatter the most lyrically tragic of the plays." *Ibid.*, p. 56. Because *Romeo and Juliet* is an Acts I and II comedy, Stig Abell defended the 2017 approach of Globe Theater director Daniel Kramer, whose presentation had "been played so strongly for laughs. There is some justification for this in the play, at least. Romeo and Juliet are given comic parallels in Mercutio and the Nurse, whose spirited bawdiness is placed in counterpart to the lovers' more heartfelt exchanges." Abell, What's Here?, Times Literary Supplement, May 5, 2017, p. 18.

39. Romeo and Juliet, Act III, sc. 5, line 192 (Quarto Two); Rene' Weis, *supra* note 5, pp. 284 (Quarto Two) and 396 (Quarto One).

40. Romeo and Juliet, Act V, sc. 3, lines 3174-3177; The Tragedie of Romeo and Ivliet, *supra* note 19, p. 675 ("True and Faithfull Ivliet").

union with Paris.[42]

a. A Golden Statue Problem: Suicide

But so simply interpreting Juliet's death delivers closure ill-fitting the tale, closely heeded. Four scenes before Montague's promise, Friar Laurence counseled the Capulets to soften their grief over the drugged, supposedly dead Juliet:

> Heaven and yourself
>
> Had part in this fair maid; now heaven hath all,
>
> And all the better is it for the maid.
>
> Your part in her you could not keep from death,
>
> But heaven keeps his part in eternal life.
>
> The most you sought was her promotion,
>
> For 'twas your heaven she should be advanced.
>
> And weep ye now, seeing she is advanced
>
> Above the clouds, as high as heaven itself?[41]

Dying in bed, Juliet is better-off in heaven. Anyone wailing over her misappreciates what (seemingly) has happened.

Whereas at play's end Roman Catholic Juliet dies a suicide, and her Protestant 1599 London audience knew what she and Friar Laurence and Roman Catholic Prince Hamlet knew. The duty not to destroy human life but upon divine commission is changeless,

however one might wish "the Everlasting had not fixed his canon against self-slaughter".[42] In the 1760s Sir William Blackstone declared: "The law of England wisely and religiously considers that no man hath a power to destroy life, but by commission from God, the author of it; and,…the suicide is guilty of a double offense, one spiritual, in invading the prerogative of the Almighty, and rushing into His immediate presence uncalled for, the other temporal, against the king,…."[43]

The audience has seen Friar Laurence hatch their encryptment plot only after Juliet warns that if he not "help" preventing her wedding with Paris, then he should deem wise what Juliet already resolves-upon:

> And with this knife I'll help it presently.
>
> God joined my heart and Romeo's, thou our hands;
>
> And ere this hand, by thee to Romeo's sealed,
>
> Shall be the label to another deed [repudiation of her marriage with Romeo],
>
> Or my true heart with treacherous revolt
>
> Turn to another, this shall slay them both.[44]

Should she exhaust the Friar's aid, she will help herself: Juliet's displayed knife empowers suicide, slaying heart and hand.

That given, Juliet's eventual suicide proves less defensible as that of innocent victim

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41. Romeo and Juliet, Act IV, sc. 5, lines 66-74; Rene' Weis, *supra* note 5, p. 308.

42. The Tragedy of Hamlet, Prince of Denmark, Act I, sc. 2, lines 131-132; William Shakespeare, Complete Works, pp. 1918, 1930 (New York: The Modern Library, 2007) Jonathan Bate and Eric Rasmussen gen. eds.) (The Royal Shakespeare Company Shakespeare).

43. J.W. Ehrlich, *supra* note 21, p. 837.

44. Romeo and Juliet, Act IV, sc. 1, lines 54-59; Rene' Weis, *supra* note 5, p. 291.

of maddening grief and horror. Too, Juliet's suicide is not a loyal wife's preclusion of adulterous union with Paris. She knew Romeo to be dead, as was Paris. In 1582 Verona as in 1599 London, here is a Juliet the less to be remembered affirmatively as long as Verona is called Verona.

b. *Another Golden Statue Problem: Romeo's Line Ends*

In the final act, Prince Escalus investigates the deaths of Romeo, Juliet and Paris:

> PRINCE   Come, Montague, for thou art early up
>
> To see thy son and heir now early down.
>
> MONTAGUE   Alas, my liege, my wife is dead tonight;
>
> Grief of my son's exile hath stopped her breath.
>
> What further woe conspires against mine age?
>
> PRINCE   Look, and thou shalt see.
>
> MONTAGUE   O thou untaught! What manners is this,
>
> To press before thy father to a grave?[45]

Both Quartos have the Prince remind the hours-widowed Montague, i.e., the audience, that it is his "heir" he has lost. Surely Montague's heart breaks.

Quarto One had both Lady Montague and Romeo's cousin Benvolio dead.[46] Quarto Two tightens focus upon only the wife lost "tonight." Bereft of son-heir and wife, Montague in his "age" learns his line, i.e., Romeo's line, pinches-out. It is the death of Benvolio, irrelevant to Montague's personal line, that Quarto Two drops.

But Lady Montague's death from grief over Romeo's exile to nearby Mantua is ludicrous. Romeo and his servant Balthasar rode post-horses to the churchyard of Juliet's crypt in about a day. Additionally, Friar Laurence sent Romeo to consummate his marriage under Old Capulet's roof on Romeo's way to exile; he assured the newlywed that in time Romeo could announce his marriage, reconcile his kin (Capulets and Montagues alike, now) and return pardoned. Her death, so ridiculous, raises suspicion it entails extraliterary justification.

The Prince exacts Friar Laurence's account of events. Thereby, his auditors learn Juliet committed suicide following Romeo's death. Although the audience/reader knows the Friar's story, his author has it consume some 35 lines. It presents a boring roadblock in a highly fast-moving play. This device's deficiencies (theatrically and literarily) likewise raise suspicion the passage entails extraliterary justification.

Escalus orders Romeo's servant Balthasar to do the same. Balthasar accompanied Romeo:

> BALTHASAR   I brought my master news of Juliet's death,
>
> And then in post he came from Mantua
>
> To this same place, to this same monument.
>
> This letter he early bid me give his father,….
>
> PRINCE   Give me the letter; I will look on it.[47]

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45. Romeo and Juliet, Act V, sc. 3, lines 208-215; Rene' Weis, *supra* note 5, p. 334.
46. Rene' Weis, *supra* note 5, p. 415 (Quarto One).

47. Romeo and Juliet, Act V, sc. 3, lines 272-275, and 278; Rene' Weis, *supra* note 5, p. 337.

The Prince announces: "The letter doth make good the Friar's words,/Their course of love, the tidings of her death."[48]

Review those Lady Montague/Friar Laurence speech/Balthasar-letter elements of the Prince's inquest in perspective of who the heroine was. True, faithful, chaste, libidinous Juliet arrives hormonally-blessed. Her father and Paris concur that younger than she are happy mothers. Lady Capulet tells Juliet:

> Younger than you,
>
> Here in Verona, ladies of esteem,
>
> Are already made mothers. By my count,
>
> I was your mother much upon these years
>
> That you are now a maid.[49]

Through Paris, Old Capulet and Lady Capulet their author gratuitously advertises to audiences Juliet's presumptive fertility at thirteen. Because gratuitous, this advertising also raises suspicion it entails extraliterary justification.

In her last speech before taking the Friar's potion, fearful Juliet imagined her crypt. She recited a passage conjuring female fertility, further, to the ears of her Biblically-instructed audience:

> Alack, alack, is it not like that I,
>
> So early waking, what with loathsome smells,
>
> And shrieks like mandrakes torn out of the earth,

That living mortals, hearing them, run mad--

> O, if I wake, shall I not be distraught,
>
> Environed with all these hideous fears,....[50]

For, of Juliet's words, Isaac Asimov comprehended:

> Since the [mandrake] root ["torn out of the earth"] looked like a man it would, supposedly, help in the formation of one, and mandrakes were therefore thought to have the ability to make women fecund. This superstition (a worthless one, of course) is sanctioned by the Bible, where Jacob's second wife, Rachel, who is barren, begs for the mandrakes gathered by the son of his first wife, her sister Leah (Genesis 30: 14).[51]

Identify rationales for repeatedly attaching reproductive capacity to Juliet.

From Friar Laurence's conspicuously untheatrical verbosity before the Prince, an audience or readership of the wiser sort could suspect some subsurface authorial motive. Suppose the Friar's familiar facts flag, by their very abundance, something specific. For the Friar excludes from his speech something specific. Literally facing the Capulet parents who lost a daughter to the subterranean romance the Friar sanctified, he ignores his inflammatory arrangements for Romeo's ingress into Juliet's bedroom. The author has his Friar relate her tragedy *omitting consummation* and permitting them to believe their daughter died a virgin. Nor has the Nurse, absent from the churchyard inquest, incentive to disillusion them following *Romeo and Juliet*'s final curtain: Nurse's consummation cooperation betrayed her employers.

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48. Romeo and Juliet, Act V, sc. 3, lines 286-287; Rene' Weis, *supra* note 5, p. 337.
49. Romeo and Juliet, Act I, Sc. 3, lines 70-75; Rene' Weis, *supra* note 5, p. 153.

50. Romeo and Juliet, Act IV, sc. 3, lines 45-50; Rene' Weis, *supra* note 5, pp. 300-301.
51. Isaac Asimov, Asimov's Guide to Shakespeare, p. 497 (New York: Wings Books, 1970) (vol. 1).

Quaere, whether the letter Romeo dispatched for his father does advise Old Montague of the consummation: Romeo feels mightiest motive to evidence the folly of the Montague-Capulet feud. (In any event, Romeo understood Juliet's death as nonvirginal wife to be a detail the less likely to offend Old Montague.) A prudent Prince would withhold such personal information from emotional Capulets: Escalus knew them able, still, to believe Juliet died virginally. Such Prince's public report of the letter must be abbreviated. Thus it was, contrasting diametrically to the Friar's speech.

If he subsequently read Romeo's letter revealing consummation, then Old Montague only too late reached realization: Juliet still lived, and might carry on his line by carrying Romeo's legitimate heir *after* Old Montague had lost both wife (knowingly) and son (unknowingly). If Lady Capulet died in the night and Juliet survived to dawn, then were Juliet pregnant she incarnated Romeo's and Old Montague's solitary chance for future family-line. So a pregnant Juliet's rescue meant rescue too of future generations of Montague and Capulet descendants. (Her father made clear: "Earth hath swallowed all my hopes but she.") Yet unmenaced Widow Montague rejected departure with Friar Laurence. She preferred to take her own life (and, possibly, someone else's). If in Romeo's letter he read of Romeo's consummation of marriage with Juliet, Montague's heart broke afresh.

Thereby, Lady Montague's death during the dark (preceding the death of the daughter-in-law who yet might bear her only grandchild) for a narrative reason: Juliet's sudden importance. Thereby, the Friar's recitation stretches so many lines for a narrative (if not theatrical) reason. Look for the matter conspicuous by its absence:

consummation. Thereby, Juliet Capulet Montague's suicide also foreclosed hope for any subsequent Montague/Capulet progeny-line for a narrative reason: It throws its light backwards across her brief biography. Thereupon, Old Montague after *Romeo and Juliet*'s final curtain would deny that this was a Juliet to be remembered affirmatively as long as Verona is called Verona. And the thoughtful 1599 Londoners too would deny that, at Montague's side.

Subsurface lurk potential problems narratively to Montague, as dramatist's deputy, purely and simply apotheosizing true and faithful Juliet. Juliet's true fidelity is gallant. But her suicide defies the mores of 1582 Verona and 1599 London. Also, her suicide can cut-off forever the family line of her husband. For in slaying herself she could kill the offspring of Romeo and Juliet.

Quaere, whether Juliet's author coolly hazarded compromise of performance punch (he had plenty to spare) to indulge an extratheatrical and extraliterary justification: Mary's implicitly-referenced life as true and faithful wife. For Mary sustained *her* true and faithful wife status plainly unclouded by troublesome side-issues. Contrariwise, one or another subsurface problem could connect to Mary's counterpart, Juliet, even following *Romeo and Juliet*'s final curtain.

ii. A Sort of House Arrest

The Second Quarto's Second Chorus underscores concisely the kind of house-arrest whereunder Juliet lies bound. For the Second Chorus opens Act II by defining the respective situations of Romeo and Juliet on their wedding-eve:

Being held a foe, he may not have access

To breathe such vows as lovers use to swear,

And she as much in love, her means much less

To meet her new beloved anywhere.[52]

Her means much less to meet anywhere.

The playwright had declined this tool in his First Quarto. Weis volunteers: "Johnson noted that the second chorus was pointless, because it failed to advance the action, merely relating 'what is already known, or what the next scenes will show,' doing so moreover 'without adding the improvement of any moral sentiment'…".[53] Erne spotlights that but for this Chorus (plus an Act I abbreviated sequence with Capulet serving men) "all other dramatic movements in Q2 have their equivalents in Q1."[54] By injecting this Second Chorus into his play (despite those Johnsonian-denounced drawbacks) the author compromised Quarto Two performance punch.

Quaere, whether an author would insert the Second Chorus unless communication called for it, imperiously. *Quaere*, whether a Second Chorus-quiet vindication of a wrongly reviled Mary Browne actually added (to the Second Quarto) an improvement (over the First Quarto) in Johnsonian "moral sentiment". It shortly will be detailed how just such Second Chorus quiet vindication of her is indicated by Browne's biographical <u>background</u> behind the stage-tragedy. Here, a clumsy literary insertion bore an extraliterary

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justification.

iii. *Marriage Hour Dreamt Not Of*

Interrogated on Sunday by her mother, Juliet's reply proves problematic:

CAPULET'S WIFE   How stands your dispositions [sic] to be married?

JULIET   It is an honour that I dream not of.[55]

Weis here notes: "honor the reading in Q1, whereas Q2-4 and F, followed by some modern editions, have 'houre' …."[56] Honor: *Quarto One*'s reading.

Richard Hosley contended that textual evidence allots the Second Quarto's "houre" to a manuscript source (not to a compositor mistake) "for the same error is repeated in the following line, and the coincidence of two such misprints in two lines is virtually impossible."[57] Sohmer sees of Juliet's reference to her marriage-hour: "Given Shakespeare's intensive time-play in *Romeo and Juliet*, surely we should follow Dr[.] Johnson and accept 'houre'."[58] Indeed, the entirety of Juliet's marriage measures in hours: Monday's Juliet is wedded and bedded, but becomes widowed before Friday's dawn.[59] Such circumstances seemingly summon that Second Quarto "houre."

Too, Juliet is interrogated by her mother in the presence of her Nurse during the Acts I and II *Romeo and Juliet* romantic comedy. As has been seen, Paris and Old

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52. Romeo and Juliet, Act II, lines 9-13; Rene' Weis, *supra* note 5, p. 180.
53. Rene' Weis, *supra* note 5, p. 179 n. 2.0, citing Samuel Johnson on Shakespeare, p. 236 (1989) (H. R. Woudhuysen ed.).
54. Lucas Erne, *Introduction*, in The First Quarto of *Romeo and Juliet*, pp. 1, 2 (New York: Cambridge University Press, 2007) (Lucas Erne, ed.). http://archiv-ouverte.unige.ch./unige:14394.

55. Romeo and Juliet, Act I, sc. 3, lines 66-67; René Weis, *supra* note 5, p. 153.
56. René Weis, *supra* note 5, p. 153 n. 67.
57. Paul L. Cantrell and George Walton Williams, *The Printing of the Second Quarto of* Romeo and Juliet *(1599)*, 9 Studies in Bibliography, pp. 107, 125 n. 31 (1957).
58. Steve Sohmer, Shakespeare for the Wiser Sort, p. 47 (New York: Manchester University Press, 2007).
59. *Ibid.*, pp. 45-47.

Capulet concur that girls younger than Juliet were mothers made in Verona. Were Juliet to allege to her mother, before a bawdy witness so knowledgeable of Juliet as is her Nurse, that Juliet (or any other libidinous lass crowding fourteen) had not dreamed of marriage ("an honor") must prove risible. In other words, no mother, Nurse nor audience could countenance with straight countenance any healthy, heterosexual 13 year-old girl between 1597 and 2018 purporting never to think ("honour that I dream not of") about being married. Given farcical-figure Nurse's presence, perhaps exactly that risibility was the author's aim during 1597 if not 1599.

Whereas in context Juliet's Second Quarto reply ("houre") is readable the less incredibly. A tight timetable is what the playwright plans for Juliet. Her reply might mean: "My wedding-hour is one I never dreamed you would raise with me either suddenly, or on an abrupt schedule." Is this too tortured an interpretation of Juliet's "houre" response? Consider a confluence of explanations for all of these Second Quarto innovations: (1) Old Montague's promised glorification of "true and faithful Juliet"; (2) the Second Chorus's reminder of a kind of house arrest; and (3) Juliet's avowedly never-mulled marriage "houre."

III. THE MARIAN THEORY AS UNIFIED FIELD THEORY OF THREE INNOVATIONS

A. True and Faithful Juliet

Maybe by 1599 (not 1597) the author determined to ventriloquize Montague to eulogize departed Juliet as chastely faithful and true--even at the price of awkwardness. Why might the playwright transmute his script thus chivalrously? Because the 3rd Earl's mother Mary had, notoriously, *not* been apotheosized as true and faithful.

The 2nd Earl of Southampton during the early portion of 1580 had become apprised that Mary had been spotted with a male friend of hers. Angrily convinced this pair were lovers, the Earl repudiated her *family* in addition to breaking with his wife.[60] Only Mary's father, 1st Viscount Montague, a Knight of the Garter, before their families' 1580 crisis had supported the 2nd Earl of Southampton in the Knights' elections of nominees to the Queen (for royal bestowal of Order Membership). The 2nd Earl never netted any votes thereafter.[61]

B. Marriage Houre.

In 1599, Mary's onstage stand-in Juliet came to be depicted as unhurrying to her marriage-"houre." At least one might surmise that of Maid Capulet, *until* becoming besotted by future husband Romeo. If Juliet is Mary, then the Romeo to whom a hotblooded female fuses herself suggests the 2nd Earl himself. An ingénue (Juliet/Mary)

60. G. P. V. Akrigg, Shakespeare and the Earl of Southampton, p. 13 (Cambridge: Harvard University Press, 1968).
61. Peter R. Moore, The Lame Storyteller, Poor and Despised: Studies in Shakespeare, p. 266 (Buchholz, Germany: Verlag Uwe Laugwitz, 2009).

unhurrying *to* her bridal bed (but for the magnetism of Romeo/Henry) implies a wife unscurrying *from* her conjugal bed (with its magnetic husband: Henry/Romeo). Such implication comports with a 1599 playwright's revision of his play in quiet vindication of Mary's uxorial virtue ("true and faithful").

C. House Arrest

Now reconsider that aforementioned Second Quarto (but not First Quarto) Second Chorus's express emphasis upon the sort of house-arrest enveloping Juliet ("her means much less/To meet her new beloved anywhere"). Reviled as adulteress by her husband the 2nd Earl, Mary was reduced to such plight that the 3rd Earl of Southampton's biographer G. P. V. Akrigg determined: "She was at this time [March 21, 1580] apparently at one of her husband's Hampshire residences where, having forever banished her from his 'board and presence', he was keeping her under close surveillance and permitting her only occasional visits by carefully selected guests."[62] Real-life Mary in custody during 1580 prefigures the 1590s' onstage Juliet, kept under something resembling house-arrest.

Thus illuminated by the life of 1599's rehabilitated Mary, the heroine of the Second Quarto (but not of the First Quarto) proves "true and faithful Juliet," according even to fictional Montague. He roughly represents the flesh-and-blood Southampton of 1599, if not 1597. (For each stands on the "bridegroom's side" in the respective marriages of maidens Juliet and Mary.) A Second Quarto's (but not First Quarto's) Second Chorus underlining the isolation endured by sanctified Juliet would underscore sympathetically the parallel isolation undergone by Mary.

The evoked compassion for the real-life Mary (in the hearts of any informed 1599 audience or readers) as well as for the onstage Juliet must mark Johnsonian "moral sentiment"-improving justification of the Second Chorus. It would seem as if between *Romeo and Juliet's* initial version and 1599 its author's sympathy had slipped more toward the daughter-wife, Verona-Capulet side (i.e., the more to the side of England's House of Montague) from the son-husband, Verona-Montague side (i.e., from England's side of the clan of the 2nd Earl of Southampton).

IV. WIDOW WRIOTHESLEY AND A POET-DRAMATIST: 1591-1594

After no later than about March 21, 1580, Mary never during her husband's life would see her son Henry.[63] Subsequent to decease of her estranged husband on October 4, 1581,[64] Dowager Countess Mary could ascertain (as Charlotte Carmichael Stopes explained) that she must mobilize to vindicate the rights of her offspring (whether or not of herself): "The Crown had a right to protect the person of the heir and to superintend the settlement of his property, and in the face of such a flagrant defiance of justice and precedent as the late Earl's will the Crown, and the Crown alone, could ignore in certain points the wishes of the testator."[65]

A mutually acceptable accommodation between Mary and the 2nd Earl's executors was reached by December 11.[66] Born on July 22, 1552, the Dowager Countess of Southampton had been 29 years of age on becoming widowed. Widely-connected, Mary

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62. G.P.V. Akrigg, *supra* note 60, p. 13.

63. Charlotte Carmichael Stopes, The Life of Henry, Third Earl of Southampton, Shakespeare's Patron, p. 4 (Forgotten Books, 2012) (PIBN 1000580590) (orig. pub. Cambridge University Press, 1922).
64. *Ibid.*, p. 5; G.P.V. Akrigg, *supra* note 60, p. 15.
65. Charlotte Carmichael Stopes, *supra* note 63, p. 8.
66. G.P.V. Akrigg, *supra* note 60, p. 19; Charlotte Carmichael Stopes, *supra* note 63, p. 12.

was both popular and a beauty.[67] Yet not until the imminence of her son's October 6, 1594,[68] attainment of his majority would she again wed.[69]

A variety of aristocratic weddings have been proposed by editors or biographers as the *A Midsummer Night's Dream*[70] premiere-setting.[71] Admittedly, prominent critic Stanley Wells pronounces: "If Shakespeare's company could at any time muster enough boys for public performances, we have no reason to doubt that it could have done so from the start. Thus the suggestion that the roles of the [*A Midsummer Night's Dream*] fairies were intended to be taken by the children of the hypothetical noble house seems purely whimsical."[72] In any case, *A Midsummer Night's Dream* might seem precisely the performance whimsically inviting children of a hosting noble house to take the role of its fairies.

Fancied wedding celebration-premiere dates encompass the whole decade elapsing between spring 1590 and June 1600.[73] By the latter twentieth century a hefty element of opinion denominated the historic juncture as that of the wedding of Sir Thomas Heneage, his Queen's Treasurer of the Chamber, Vice-Chancellor of the Household, and Chancellor of the Duchy of Lancaster,[74] to Mary, Dowager Countess of Southampton.[75] (Sir Thomas

had been widowed on November 19, 1593.[76]) Opined Charlotte Carmichael Stopes concerning the twenty year-old Henry Wriothesley and that theatrical possibility: "Now, if that play was performed at his mother's wedding, it would give Southampton a chance of being stage manager, whether the performance was at Southampton House, at Horsham, at the Savoy, in the rural surroundings of Coptall, or even at Titchfield; and he would have enjoyed that."[77]

Through coincidence possibly most agreeable, Sir Thomas as Treasurer of the Chamber exercised the duty of paying acting companies for their performances. The Dowager Countess-bride could have known about the author who had dedicated to her son the narrative poems *Venus and Adonis*[78] and *The Rape of Lucrece*[79] during 1593 and 1594 respectively. Her wedding to Heneage, at which the narrative poet's *A Midsummer Night's Dream* some speculate was performed initially, took place on May 2, 1594.[80]

Akrigg refers to the groom as "old Sir Thomas Heneage."[81] Samuel Schoenbaum deems Heneage "elderly."[82] Charlotte Stopes, biographer of the 3rd Earl of Southampton, styles the groom as "Sir Thomas Heneage, an old friend of the family," adding that Heneage had been bestowed numerous grants of land by Elizabeth.[83] This ill-starred groom would die during 1595, at about the ancient age of 63.[84] Then was twice-widowed

67. Charlotte Carmichael Stopes, *supra* note 63, p. 62.
68. *Ibid.*, p. 69; G.P.V. Akrigg, *supra* note 60, p. 41.
69. Charlotte Carmichael Stopes, *supra* note 63, p. 62.
70. A Midsummer Night's Dream (New Haven: Yale University Press, 1957) (Willard Higley Durham ed.) (The Yale Shakespeare).
71. Samuel Schoenbaum, William Shakespeare: A Compact Documentary Life, p. 186 (New York: Oxford University Press, 1977).
72. *Ibid.*, p. 187, quoting Stanley Wells, *Introduction*, in A Midsummer Night's Dream, pp. 13-14 (New Penguin Shakespeare, 1967).
73. *Ibid.*, pp. 186-87.
74. G.P.V. Akrigg, *supra* note 60, p. 41.
75. Samuel Schoenbaum, *supra* note 71, p. 187. "On the assumption that the play celebrates some noble wedding of the period, scholars have come up with a number of suitable marriages. Chief are those of Sir Thomas Heneage to Mary, Countess of Southampton, ..." *Date and Text*, in William Shakespeare, A Midsummer Night's Dream, p. 81 (New York: Bantam Books, 1988) (3rd ed.) (David Bevington ed.).

76. Charlotte Carmichael Stopes, *supra* note 63, p. 62.
77. *Ibid.*, pp. 75-76 .
78. Venus and Adonis, Lucrece and the Minor Poems, p. 1 (New Haven: Yale University Press, 1927) (Albert Feuillerat ed.) (The Yale Shakespeare).
79. *Ibid.*, p. 44.
80. Samuel Schoenbaum, *supra* note 71, p. 187; Charlotte Carmichael Stopes, *supra* note 63, p. 63.
81. G.P.V. Akrigg, *supra* note 60, p. 41.
82. Samuel Schoenbaum, *supra* note 71, p. 187.
83. Charlotte Carmichael Stopes, *supra* note 63, p. 62.
84. Martin Green, Wriothesley's Roses: In Shakespeare's Sonnets, Poems and Plays, p. 122 (Baltimore: Clevedon Books, 1993).

Mary approximately 43 years old.

That said, the newlywed still-Dowager Countess of Southampton and her notably uncallow spouse securely might smile upon (rather than scowlingly betray offense at) the opening of the playwright's submission:

> Now, fair Hippolyta, our nuptial hour
>
> Draws on apace; four happy days bring in
>
> Another moon; but O! methinks, how slow
>
> This moon wanes; she lingers my desires,
>
> Like to a step-dame, or a dowager
>
> Long withering out a young man's revenue.[85]

Truly might a Dowager's gold-digging suitor of tender years feel frustrated awaiting their wedding while watching her consume his anticipated take. For she thus shrinks her impatient *young* man's anticipated income. Therefore, the passage risks stage-players' gross impertinence in entertaining a wealthy, middle-aged dowager and typical young bridegroom.

But such bridegroom-case contrasts to the polar opposite one of aging Sir Thomas, possessor of spectacular revenue (or landholdings). In May 2, 1594's reality, these lines' relevance implies their playwright to be familiar with (at least secondhand) the mother of the high-profile 3rd Earl: Mary seems clearly understood to be embracing a superannuated groom already rich with revenues—at least, in properties—of his own. Such an authorial

mindset might arise whether or not the matron's own mind ever entertained even the existence of her entertainer-dramatist.

V. THE ADVENT OF THE FIRST QUARTO

A. There's Something About Mary and William

A.L. Rowse calculated that again-widowed (in October 1595[86]) Mary "had done extremely well by her second husband, and out of her sixteen months of married life"[87] shared with the spouse, whom Rowse labels "her elderly husband."[88] Rowse's verdict sustains the vivid distinction between an opportunistic young male mindful of revenue acquirable from a dowager-bride, and Mary's bridegroom of financial substance, Sir Thomas Heneage. Still another knight arrived to perform his prominent part in widowed Mary's love-life: Sir William Harvey (or Hervey). Sir William was Mary's junior by upwards of eleven years.[89]

Harvey displayed youthful heroics in the 1588 Spanish Armada struggle.[90] On June 28, 1596, he had been knighted in Spain for service in the English raid against Cadiz, Spain.[91] The Essex Expedition returned to Plymouth by August 8, 1596.[92] That month appears opportune for a certifiably courageous warrior to make a move on the

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85. A Midsummer Night's Dream, Act I, sc. 1, lines 1-6; A Midsummer Night's Dream, *supra* note 59, p. 1.

86. A.L. Rowse, Shakespeare's Southampton: Patron of Virginia, p. 105 ((New York: Harper & Row, Publishers, 1965).
87. *Ibid.*, pp. 105-106.
88. *Ibid.*, p. 104.
89. Jesse M. Lander, *Textual Introduction,* in The Norton Shakespeare, p. 1175 (New York: W.W. Norton & Company, 2016) (3rd ed.) (Stephen Greenblatt, gen. ed.).
90. A.L. Rowse, *supra* note 86, p. 128.
91. Alice-Lyle Scoufos, *supra* note 4, p. 230..
92. Charlotte Carmichael Stopes, *supra* note 63, p. 98.

eligible Dowager Countess. At least as soon after August 1596 as May 1597 court gossip sprouted around the possible marriage of Mary with William.[93] Harvey's squiring of his mother repelled the now-adult Henry Wriothesley.[94] Perhaps Henry held Harvey an incarnation of *A Midsummer Night's Dream*'s (relatively) downscale and (relatively) young man coveting a dowager's revenue, a treasure already awaited by this Dowager's prospective heir Henry himself.

Coincidentally or not, someone selected 'Harvey' as the original name of a negative character acted on London's playhouse stage. Harvey onstage was a hanger-on of naughty old soldier Sir John Oldcastle[95] in the original *1 Henry IV*. Coincidentally or not, the original *1 Henry IV* dated from *circa* mid-1596.[96] When the 3rd Earl of Southampton turned cold toward his mother and her suitor, in *1 Henry IV* the father of the Shakespearean *corpus* accompanied his dedicatee down that road. Alice-Lyle Scoufos contributed: "I wish to suggest that the tensions between Southampton and Harvey at this time [1596-1598], tensions which developed into outright hatred in 1598, are reflected in the satire of the history plays."[97]

B. There's Something About Romeo and Juliet

Nor was *1 Henry IV* the solitary Shakespearean *corpus* work in the works *circa* 1596. In light of the 1597 Quarto One, Anthony Davies during 2015 concluded:

"Allowing time for the play's reportedly numerous performances and the compilation from memory of the manuscript, *Romeo and Juliet* could not very well have been written before late 1596."[98] Coincidentally or not, approximately when Wriothesley turned comparatively unfriendly toward William and onetime 13 year-old bride Mary, *Romeo and Juliet* assumed the side of the 3rd Earl (through comparatively unfriendly handling of 13 year-old bride Juliet and the Capulets). For discernable is an entire Marian Theory unified field of comparatively anti-Capulet facets of the First Quarto, only to be followed (coincidentally or not) by comparatively more amicable innovations in the Second Quarto.

Consider that the mother Mary-son Henry breach stretched beyond the 2nd Earl's death. Akrigg speculates that the 2nd Earl had drilled into prepubescent son Henry the shame of his mother's supposed adultery.[99] Mary, fiercely, was not hailed as true and faithful. To Mary's husband Sir Thomas Heneage, the stepson Southampton proved "unkind and injurious."[100] Around August 1598, Mary said the 3rd Earl "never was kind to me."[101] So what intervened between 1597 and 1599?

VI. THE STORY OF 1597 TO 1599: THERE'S SOMETHING ABOUT MARY AND HENRY

After the February 19, 1566, wedding of the 13 years and 6 months-old daughter

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93. G.P.V. Akrigg, *supra* note 60, p. 58; A.L. Rowse, *supra* note 86, p. 129; Alice-Lyle Scoufos, *supra* note 4, p. 235.
94. Chris Laoutaris, Shakespeare and the Countess: The Battle That Gave Birth to the Globe, p. 232 (New York: Pegasus Books LLC, 2014); Alice Lyle-Scoufos, *supra* note 4, p. 236.
95. Charles Boyce, Shakespeare A to Z, p. 243 (New York: Roundtable Press, Incorporated); Alice-Lyle Scoufos, *supra* note 4, p. 235.
96. Charles Boyce, *supra* note 95, p. 255.
97. Alice-Lyle Scoufos, *supra* note 4, p. 235.

98. Anthony Davies, *Romeo and Juliet*, in The Oxford Companion to Shakespeare, p. 334 (New York: Oxford University Press, 2015) (Will Sharpe and Erin Sullivan revising eds.) (2nd ed.).
99. G.P.V. Akrigg, *supra* note 60, p. 15.
100. *Ibid.*, p. 182, quoting Historical Manuscripts Commission's calendar of the Hatfield archives, V, 277. That original source confuses stepson with "son-in-law." *Ibid.*
101. *Ibid.*, p. 15, citing Historical Manuscripts Commission's calendar of the Hatfield archives, VIII, 379.

of Anthony Browne, 1st Viscount Montagu, Mary to Henry Wriothesley, 2nd Earl of Southampton,[102] the 2nd Earl's mother (the Dowager Countess of Southampton) died in 1574. Augmenting the means of the 2nd Earl, the widow's death encouraged extravagance of her son[103]; erecting his great new mansion (Dogmersfield) demanded a lavish scale of funding.[104] Henry maintained a retinue far beyond its necessary numbers.[105] Thereafter would his own son, the 3rd Earl, skirt bankruptcy bidding to sustain such paternal munificence.[106]

In the Akrigg account:

> What little evidence we have suggests that Southampton had been living very lavishly since his coming of age in 1594. By 1597 he was deep in financial difficulties. On February 11th of the latter year, noting that he 'stood indebted to divers persons in great sums of money, for payment of which he and sundry his friends stand bound', he transferred the entire administration of his estate to three attorneys. The persons to whom the Earl turned over this sorry mess were Ralph Hare and Edward Gage, both of whom had been executors administering his father's estate, and William Chamberlain, whose family had long been in the service of the Wriothesleys, and whose own long and faithful service would end only with his own death and burial in Titchfield Church. The Earl made only one stipulation in the deed appointing these administrators of his estate – they must not sell the

manors of Titchfield, Beaulieu, North Stoneham, Micheldever, Ewshott, or Long Sutton. The next day he signed a covenant with his mother and his friend Lord Mountjoy, promising to keep these manors and to leave them, and whatever other estates his attorneys did not dispose of, to his own future issue or, should he have none, to his sister, 'the Lady Mary, wife to Thomas Arundell and their right issue'.[107]

So, certainly interesting was covenant-day February 12, 1597.

An arresting span remained the entire year 1597. Again, Akrigg relates:

> Personal problems may have contributed to Southampton's frequent absences from Parliament. He had returned from the Azores to find that, despite the endeavours of his attorneys, his finances were still critical. Surveying the situation, he decided to live quietly abroad for a few years. To pay off the most pressing of his debts and to raise money for his travels, he resorted to the last expedient of a lord nearing bankruptcy – he began selling land. Late in 1597 and early in 1598 he sold his manors of North Stoneham, Portsea, Copnor, Corhampton, and Bighton.[108]

By autumn 1598, this blueblood was in Paris, gambling[109]: "One of [Sir Robert] Cecil's agents informed him that Southampton was losing money at such a rate (the Marshall of Biron had alone won 3,000 crowns from him in a few days) that if he did not quickly leave France he would find himself without estate or reputation both there and in England."[110]

102. Charlotte Carmichael Stopes, *supra* note 63, p. 501.
103. G.P. V. Akrigg, *supra* note 60, p. 12.
104. *Ibid.*
105. *Ibid.*
106. *Ibid.*
107. *Ibid.*, pp. 58-59. "For the deed of attorney and the covenant, see *W.P. 580, 580.I and I69.*" *Ibid.*, p. 59 n. 1.
108. *Ibid.*, p. 67.
109. *Ibid.*, p. 73.
110. *Ibid.*, citing Salisbury, MSS., VIII, 358.

The seeming approach of his mother's marriage to Sir William Harvey upset Henry.[111] For Sir William was not of so sanctified a social level as were the Dowager Countess of Southampton and the 3rd Earl.[112] The maternal remarriage menace, moreover, might in turn invite financial developments unwelcome to the son ensnared in his own budgetary incompetence.[113] Lord Henry Howard is reputed to have been a smooth negotiator.[114] Lord Henry entered this intrafamilial snarl to facilitate a maternal-filial reconciliation.[115] Lady Heneage postponed her Harvey alliance and (in probability) satisfied her son regarding her marriage settlement, rendering Henry as happy as practically possible during December 1598.[116]

Park Honan has Harvey wedding Mary in 1598.[117] Southampton seems to have accepted their alliance, they marrying by January 31, 1599, with or without the presence of the 3rd Earl.[118] Adds Akrigg: "Shortly afterwards, as a sign of his good will, Southampton granted Harvey and his wife permission to cut timber on the lands which his mother held during her lifetime under the jointure made by his father."[119] The 3rd Earl's goodwill gesture to his mother looks to have transpired about February 20, 1599.[120] As of the April 1607 preparation of her will, this Lady Harvey had directed she be buried at Titchfield

as nearly as possible to the body of the 2nd Earl; so would she be.[121]

Jointure. True and faithful.

VII. THE ADVENT OF THE SECOND QUARTO

A.   The Second Quarto Speaks for Itself

Of Capulet's phrase "This is my daughter's jointure," G. Blakemore Evans accurately holds: "The handclasp of friendship (ending the feud) is Juliet's jointure (= marriage settlement made by the bridegroom's father)."[122] When did Evans's Second Quarto jointure as token of reconciliation occur to the playwright? The Second Quarto titlepage boasts: "THE/MOST/EX-/cellent and lamentable/Tragedie, of Romeo and *Iuliet. Newly corrected, augmented, and amended:* As it hath been sundry times publiquely acted, by the right honorable the Lord Chamberlaine/his Seruants./London/Printed by Thomas Creede, for Cuthbert Burby, and are to/be sold at his shop neare the Exchange, 1599."[123] Dutton declares the record remains void of evidence of a Second Quarto pre-1599.[124]

Neither the First Quarto nor the Second originally was entered on the Stationer's Register.[125] Evans opines that: "The formula 'Newly corrected,' etc., is now considered a publisher's device for asserting the authority of his text and distinguishing it from…

111. *Ibid.*; Charlotte Carmichael Stopes, *supra* note 63, p. 130.
112. Charlotte Carmichael Stopes, *supra* note 63, p. 130.
113. *Ibid.*, pp. 130-131.
114. G. P. V. Akrigg, *supra* note 60, pp. 73-74. "…Lord Essex [Robert Devereux, 2nd Earl of Essex] had enlisted the co-operation of Lord Henry Howard. He knew that the Countess of Southampton would be drawn on by his [Howard's] courtly flattery to speak more freely than she would have done to himself." Charlotte Carmichael Stopes, *supra* note 63, p. 132.
115. G. P. V. Akrigg, *supra* note 60, p. 74.
116. Charlotte Carmichael Stopes, *supra* note 63, p. 136; A.L. Rowse, *supra* note 86, p. 132.
117. Park Honan, *Harvey, Sir William*, in The Oxford Companion to Shakespeare, *supra* note 87, at 160.
118. G. P. V. Akrigg, *supra* note 60, p. 74; Charlotte Carmichael Stopes, *supra* note 63, p. 140.
119. G. P. V. Akrigg, *supra* note 60, p. 74.
120. *Ibid.*, p. 74 n. 2, citing Wriothesley Papers 1000, February 20, 1599.

121. *Ibid.*, p. 151. "The Countess of Southampton died in 1607." Charlotte Carmichael Stopes, *supra* note 63, p. 343.
122. G. Blakemore Evans, Romeo and Juliet, p. 200 n. 297 (New York: Cambridge University Press, 2003) (updated ed.).
123. William Shakespeare, The Tragedy of Romeo and Juliet, p. 161 (New York: Penguin Books USA Incorporated, 1990) (J.A. Bryant, Jr., ed.) (With New Criticism and an Updated Bibliography).
124. Richard Dutton, *supra* note 2, p. 81.
125. G. Blakemore Evans, *supra* note 122, p. 222 n. 1.

Q1."[126] Dutton deems "corrected" to communicate naught but a device to move product from the shelves.[127] Dutton defines it as practically a synonym of 'amended' during Shakespearean times.[128] There had been a consensus that this 1599 Second Quarto printer's copy somehow derived from the author's foul papers, but for Act I, scene 2, line 50 to Act I, scene 3, line 55.[129] Dutton reports and reiterates that the Second Quarto coinage 'augmented' appears synthesized for Shakespearean plays, its initial three utilizations occurring concerning *Love's Labour's Lost, Romeo and Juliet*, and *Richard III*.[130] This term, Dutton posits, primarily pronounces upon textual revisions accommodating divergent performance circumstances.[131]

Definite evidence of any theatrical provenance of the Second Quarto is lacking, in contrast to the case of the First Quarto.[132] Dutton is deliberate in embracing the First Quarto's boast that it often had been publically performed,[133] the document itself highlighting the point.[134] He presumes transmutation of some source into Quarto Two between 1597 and 1599.[135] More precisely: "In the case of [*Romeo and Juliet*] Q2, I think it can be shown that the manuscript behind it recorded an expansion and elaboration, not of Q1 itself, but of the play of which Q1 is only a somewhat inadequate record. And the likeliest explanation for that is that it [formulation of Quarto Two] was done

for a court performance."[136] Hence, textual transmutation for presentation to a different audience: Dutton contends it highly probable that *Romeo and Juliet* was performed at court.[137]

B. Historical Circumstances Bespeak the Second Quarto's Contextual Moment

Dutton sees the system of licensing as aimed to abort proliferation of texts potentially undesirable, e.g., abusive of powerful parties.[138] He waxes emphatic: "When we have multiple texts of the same play, therefore---and we believe that they were performed in texts pretty much resembling those of each of those configurations--we have to account for them within these specific constraints. And where possible we should *historicize* them as closely as possible, trying to recreate the contextual moment that separated one version of a text from another."[139] *Historicize. Contextual moment.*

What transpired between 1597 and 1599 whereby an author aligned (if but as dedicator) with Southampton even pre-1597 could comfortably celebrate explicitly--through Montague's mouth--as "true and faithful" the Veronese *Fiorella*-bride of 13 (Juliet), plus celebrate implicitly England's-rose bride of 13? *Contextual moment*. What intervened had been closure circa February 20, 1599, of the gulf dividing the potent 3rd Earl from his mother: Mary, the 2nd Earl's child-bride, wedded while age 13. Alice-Lyle Scoufos opined of *Romeo and Juliet*'s progenitor *circa* 1596-1598: "The playwright appears to have been sensitive to the immediate conflicts within the restive court of Elizabeth."[140]

126. *Ibid.*, p. 224.
127. Richard Dutton, *supra* note 2, pp. 132-133 and 136.
128. *Ibid.*, p. 134.
129. G. Blakemore Evans, *supra* note 122, p. 224.
130. Richard Dutton, *supra* note 2, pp. 128-29 and 136.
131. *Ibid.*, p. 128 n. 51.
132. G. Blakemore Evans, *supra* note 122, p. 224.
133. Richard Dutton, *supra* note 2, p. 109.
134. *Ibid.*, p. 110.
135. *Ibid.*, p. 214.

136. *Ibid.*, p. 213.
137. *Ibid.*, pp. 136-137.
138. *Ibid.*, p. 212.
139. *Ibid.* (italics in Dutton).
140. Alice-Lyle Scoufos, *supra* note 4, p. 235.

It proved more politic by 1599 than in prior years for playwrights shying from offending Henry Wriothesley to hail as full of grace, Mary: Henry's mother. *Historicize.*

C. The Playwright Speaks in Quarto Two: Juliet's Expertly Enriched Role

In a case like *Romeo and Juliet*, Wall acknowledged complications (to comprehending any single play's depiction of, e.g., state, desire, and family) upon envisioning texts to be non-identical twins.[141] Of the 1597 and 1599 *Romeo and Juliet* quartos, she held emphatically: "While keeping firmly in mind the danger of flattening out contradictions *within* each individual quarto, I think it possible to argue, generally, that parental, church, and state authority are more lavishly displayed in Q2 than in Q1."[142] Wall propounded specifically: "Q1 exposes what is at stake in this [Quarto Two] alternative version, in its [Quarto One's] pointed *lack* of interest in the internal problems of family, in distinguishing personalized foibles, or airing a competition between family and state."[143]

Dutton explains how it becomes easier to understand scenes lengthened in Quarto Two from Quarto One as, genuinely, Quarto One's augmentation regarding "the roles of two characters in particular, Juliet and Friar Laurence."[144] Addressing the scene wherein Juliet awaits her Nurse's return with news of Romeo, Dutton asserts Juliet's award of the great bulk of additional lines[145]: "In Q2 Juliet develops a strain of witty, anxious frustration for which there is no equivalent in the other version…."[146] Assuredly, "Q2 has been re-imagined, deftly working within the framework of Q1, to give Juliet a fuller

presence and her frustration at the Nurse's delays a more comic and credible rhythm."[147]

Dutton dilates upon Quarto Two as:

…a more studied revision, written…for the wider canvas of a court performance.

To return to Juliet, we can see this pattern again in even more pronounced form …, where she enters once more urging time to fly, longing for the night: "Gallop apace, you fiery-forced steeds'….In Q1 this speech is only four lines long; in Q2 it is thirty-one. The Q2 scene as a whole is 143 lines long, Q1 59. The expansion, however, is very substantially that of Juliet's role. The Nurse gets only 12 more lines (20 to 32), whereas Juliet's part grows from 40 lines to 111. Even leaving aside the opening soliloquy, her role doubles. The twists and turns of her emotional state are followed with rhetorical embellishment…..

And finally--an insight not reflected in Q1—she recognizes that she is likely to 'die maiden-widowed'…At that point what I have characterized as rhetorical embellishment—a verbal simulacrum of her feelings—turns into a painful piece of self-realization, as the personal implications of the day's events sink home. The whole scene therefore describes a dramatic arc, from impatient expectation to a state of living death….[148]

Consistently with Dutton's case, Stig Abell during 2017 praised the Juliet of Kirsty Bushell[149] in director Daniel Kramer's Globe Theater *Romeo and Juliet*. Abell held of Juliet's Act III, scene two "Gallop apace" monologue that: "Her great speech, perhaps

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141. Wendy Wall, *supra* note 10, p. 161.
142. *Ibid.*, p. 163 (italics in original).
143. *Ibid.*, pp. 163-164 (italics in original)
144. Richard Dutton, *supra* note 2, p. 214.
145. *Ibid.*, p. 214.
146. *Ibid.*, p. 215.

147. *Ibid.*
148. *Ibid.*, pp. 217-218 (footnote and internal citations omitted).
149. Abell, *supra* note 38, p. 18.

the great speech in the play ('Come night, come. Romeo, come thou day in night') has a youthful lust and tired despair."[150] *Great speech in the play.*

In consequence, comprehends Dutton:

> The evidence from the characterization of Juliet and Friar Laurence consistently points to a richer and fuller realization of the roles in Q2 than in Q1, which is not simply a matter of having more lines to speak. There are advances in their motivations and self-awareness which would surely not have been lost so thoroughly and systematically in a stripping-down of Q2 for the public theater, much less its misremembering. They are much more credibly the result of a careful and deliberate expansion ("Newly corrected, augmented, and amended") of what lay behind the Q1 text.[151]

And what of pubescent Mary Browne, child-bride and Countess of Southampton? Dutton discerns that the lines of Quarto Two (beyond those of Quarto One) constitute "lines that, in the case of Juliet, create a tragic heroine of credible substance for Romeo,… ."[152] *Heroine of credible substance.* Rehabilitation. 1599.

As seen hereinabove, resourceful Dutton openly attached that 1597 to 1599 interval to the development of Quarto Two from Quarto One. He did so while hypothesizing the advent of one boy actor (at a minimum) commanding such talent as to carry several sophisticated, extensive female roles like Juliet's.[153] Dutton's dating and accompanying hypothesis suit the Marian Theory envisioned herein. For serendipitous accession of lads so serviceable toward Mary's subtle rehabilitation before court sophisticates (more

knowledgeable of her backstory and alert to allusion than groundlings) itself could cry for *Romeo and Juliet*'s timely augmentation. That augmentation saliently entailed protraction plus enhancement of the roles of Juliet and Friar Laurence.

VIII. HEAVYWEIGHTS WELLS AND VICKERS WRESTLE OVER A JIGSAW PUZZLE

One might acknowledge *arguendo* that the 1597 First Quarto constitutes a degenerated text such as might have proved a traveling company's stage version,[154] whether[155] or not[156] being a pirated edition. Debate arose over whether the Quarto published in 1599 was earlier or later-created than the Quarto published in 1597. Undoubtedly did that Second Quarto titlepage's boast, quoted hereinabove, relate to the inferiority and brevity of the First Quarto. It was opined long ago by, e.g., Howard Staunton, that the amplifications and many corrections of that First Quarto found in the Second were the playwright's, alone.[157] So fine is the Second Quarto text that a number of scholars submit "that the quarto of 1599 must have been printed from Shakespeare's own manuscript."[158] Said manuscript might have been earlier-created than was the 1597 Quarto. But a sense of uncertainty surrounded the extent (if any) the play had been rewritten as of 1599.[159]

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150. *Ibid.*
151. Richard Dutton, *supra* note 2, p. 219.
152. *Ibid.*, p. 225.
153. *Ibid.*, p. 214.

154. Hardin Craig, in An Introduction to Shakespeare: 8 Plays Selected Sonnets, pp. 23-24 (Chicago: Scott Foresman and Company, 1952) (Hardin Craig ed.).
155. *Romeo and Juliet*, in The Reader's Encyclopedia of Shakespeare, p. 709 (New York: Thomas Y. Crowell Company, 1966).
156. Hardin Craig, *supra* note 154, p. 23.
157. Howard Staunton, in The Globe Illustrated Shakespeare, p. 156 (New York: Crown Publishers Incorporated, distrib., 1986).
158. Hardin Craig, in The Complete Works of Shakespeare, p. 393 (Chicago: Scott, Foresman and Company, 1951) (Hardin Craig ed.).
159. Hardin Craig, *supra* note 154, p. 24.

This somewhat sustains the vitality of the Marian Theory clarification of interdocumentary differences discussed herein. For rewriting of 1599 could incorporate authorial response to 1597-1599 events. (This is accurate even were the 1597 "First Quarto" ultimately derivative from much of a now-misdated "Second Quarto.") For their part, Alfred W. Pollard and J. Dover Wilson in 1919 acknowledged that even before themselves it had been ascertained "that the 1599 Quarto was derived from a MS. which bears evident marks of revision…."[160] In their opinion: "… *Romeo* Q.2 teems with evidences of revision, and the MS. from which it was derived must have presented a strange patchwork appearance to the eye."[161] Actually, "Everything points to the fact that Q.2 was printed from the author's MS,…."[162]

A. One Jigsaw Puzzle or Two?: King Lear, Quarto and Folio

Wells, of Stratford-on-Avon's Shakespeare Birthplace Trust, during 2017 opined concerning *King Lear* that a…claim that the Quarto and Folio versions of both represent a single lost version might mislead readers into thinking that they are like two copies of the same jigsaw, each missing a few different pieces, and that moving those pieces from one to the other will complete the picture. They are not. For instance, the play's last lines are spoken by Albany in the Quarto and by Edgar (with one verbal difference) in the Folio. These lines are differently shaped and coloured pieces of two jigsaws, each at home only in its own place.[163]

Some might attempt overriding the Marian Theory via positing *Romeo and Juliet's* Quarto One and Quarto Two as representative of a single version of the play. *Quaere*, whether that might: (1) mislead one into thinking that either (or both) misses but a few different pieces, whereby moving pieces from its counterpart completes the picture; and whether such proposition misguides because (2) *Romeo and Juliet* interquarto divergences are differently shaped and colored pieces of *two* jigsaws, each at home only in its own time and place.

B. One Jigsaw Puzzle or Two?: Romeo and Juliet, Quarto One and Quarto Two

A week later Brian Vickers appeared in print challenging Wells. Vickers deigns the Wells "two copies of the same jigsaw"-formulation "a nice metaphor."[164] Yet Vickers counters concerning the Quarto and Folio versions of *King Lear*: "Given that they share 2,825 lines, or 90 per cent of the whole, and that the Folio contains no new scenes or characters, no rearrangements of plot, no new speeches, I find it illusionary to claim they are independent artistic creations."[165] (Also, Vickers adduces rebuttal evidence to Wells's Albany-Edgar point.[166])

Do the *Romeo and Juliet* Quartos fall on: (1) Vickers's NOT independent artistic creations-side of this evidentiary line; or on (2) Wells's TWO jigsaws-side of this evidentiary line? As if in tribute to Vickers, Dutton does recognize of Quarto One: "It is entirely coherent, follows the action in almost exactly the same sequence as Q2, and in

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160. J. Dover Wilson and Alfred W. Pollard, The "Stolne and Surreptitious" Shakespearean Texts: Romeo and Juliet, 1597, Times Literary Supplement, August 14, 1919, p. 434.
161. *Ibid.*
162. *Ibid.*
163. Stanley Wells, Letter to the Editor, Times Literary Supplement, February 24, 2017, p. 6.

164. Brian Vickers, Letter to the Editor, Times Literary Supplement, March 3, 2017, p. 6.
165. *Ibid.*
166. *Ibid.*

many places runs closely parallel with it;…."[167] However, as though in tribute to Wells, Dutton's next sentence adds: "The main difference is simply length (and accompanying verbal richness), with Q2 at 2,989 lines and Q1 2,215, every scene shorter than its Q2 counterpart. This is rarely because action is missing and mainly because some of its speeches lack passages (long and short) that only appear in Q2."[168]

Judge whether Vickers's 90 percent *King Lear* Quarto-Folio lines-overlap metric contrasts overtly with the expansion of *Romeo and Juliet*'s Quarto One by more than a third in Quarto Two. Judge whether Vickers's *King Lear* Quarto-Folio "no new speeches" metric contrasts overtly with *Romeo and Juliet* Quarto Two "speeches" newly-elaborated beyond Quarto One. As seen hereinabove, Dutton identifies a Quarto Two focus on an enhanced Juliet-characterization. He cites Quarto Two's Act III scene with Juliet's "Gallup apace, you fiery-footed steeds" expanded from 59 lines to 143[169]: "The whole scene therefore describes a dramatic arc, from impatient expectation to a state of living death. It is a bravura piece, which surely only the most accomplished boy actor could handle."[170] If Dutton reads aright, then judge whether one witnesses in the Quarto Two *Romeo and Juliet* a Vickers *independent* "artistic creation."

Dutton contrasts those Quartos thus: "Q1 is a perfectly playable, more than adequate telling of the story of *Romeo and Juliet*. But Q2 shows something with so much more ambition, both linguistic and theatrical. The ambition is even there in the size of the cast called for."[171]

167. Richard Dutton, *supra* note 2, p. 211.
168. *Ibid.*
169. *Ibid.*, p. 217
170. *Ibid.*, p. 218.
171. *Ibid.*, p. 225.

If Dutton's overview-reading is halfway-right, then judge whether the 1597 Quarto One and the (more than a third-again longer) 1599 Quarto Two fall on Wells's TWO jigsaws side of the evidentiary boundaryline (because proving the "independent artistic creations" Vickers demanded). Determine whether a muse named Mary assisted in inspiring independent artistic creation for 1599.

C. Printers See Two Jigsaw Puzzles: Quarto One and Quarto Two

Davies submits that Quarto Two's compositors, working from the authorial rough draft, occasionally reached for guidance from Quarto One.[172] That is not to say they simply abandoned the playwright's own papers. Weis speculated that Quarto Two was written to supersede Quarto One. Weigh Weis's apprehension that even the printers of Quarto two reacted to the reality of their 1599 Quarto's unique, post-1597 tale to tell:

> A copy of Q1 was evidently at hand when Q2 was printed, but at no point, it seems, were the printers of Q2 therefore tempted to jettison their manuscript copy and revert to Q1 altogether.

> The two quartos were clearly perceived to be discrete enterprises, the more so since the extra lines ("augmented") promised by the title page overtly acknowledge the lesser scale of Q1.[173]

Yes, extra lines promised by the title page of a *discrete* undertaking.

In the language of Vickers, the shop's printers--as seen hereinabove, Thomas Creede

172. Anthony Davies, *supra* note 98, p. 334. Dutton dutifully reports: "…some scholars think that parts of Q2, though mainly based on Shakespeare's own manuscript, were set by reference to Q1." Richard Dutton, *supra* note 2, p. 211. Dutton does not thereby cast his lot with them.
173. Rene' Weis, *supra* note 4, p. 98.

printed the 1599 play[174]---comprehended their midwifery of an independent artistic creation. Nonetheless, their confidence on that issue generates an antecedent query. One wonders who conclusively could convince Creede's compositors concerning the gravity of their task. *Quaere* whether, if hirelings thus proved persuaded to accord the author's rough work-product such respect, then what party embodied so vital an authority in their working-men's eyes. If only one could guess who would deliver his rough notes firsthand to apprise his printers, so effectively, of the trust they bore: A *discrete artistic creation.*

IX. THE CONCEPTION OF SISTER QUARTOS

And what was the Pollard-Wilson position on the Quarto One-Quarto Two relationship?

In the first place, if Q.2 is derived from a revised manuscript, that manuscript must at one time have existed unrevised; and there is abundant evidence that Q.1 was in fact derived from this same manuscript at an earlier stage of its development.[175]

Quaere: Was such pre-Quarto One source ("Q.1 [1597] was in fact derived from this ...manuscript") a document—call it Quarto Zero--available for performance in August 1591 during Queen Elizabeth's summer progress but unrevised before 1597? The monarch in summer 1591 visited the Cowdray Park residence of the 1st Viscount Montague, and the Titchfield country seat of the Earl of Southampton.[176] The Cowdray Park proceedings were so memorable that in 2016 Elizabeth Zeman Kolkovich recounted them[177] and their aftermath (e.g., contemporary, publicly printed reports thereof) while arguing that such Country House Entertainment of the monarch constitutes its own genre of literature.[178] According to Pollard and Dover, some such text could have been the origin ultimately behind both Quarto One's birth and Quarto Two's birth.

Moreover, Dutton mused upon Quarto Two as advertising its correcting, amending and augmenting Quarto One, "But it could equally refer to another, lost acting version"[179] being amended and augmented. In fact, Dutton expressly puts forth that *Romeo and Juliet*'s Quarto One was born among "poorly reported versions of the [Shakespearean *corpus*] plays as they originally existed, before they were transformed into the canonical versions we know best today."[180] The originary document equally easily could "have been a lost manuscript somewhere behind Q1 as Q2 itself."[181] Dutton's lost *Romeo and Juliet* acting version, poorly reported in Quarto One, sounds not unlike a 1591 Quarto Zero.

174. *Ibid.*, p. 35n.2.
175. J. Dover Wilson and Alfred W. Pollard, *supra* note 160, p. 434.

176. G.P.V. Akrigg, *supra* note 60, pp. 7 and 35-36; Geoffrey Bullough, Romeo and Juliet. *Introduction*, in Narrative and Dramatic Sources of Shakespeare, p. 276 (New York: Columbia University Press, 1957) (Geoffrey Bullough ed.) (vol. 1); Charlotte Stopes, *supra* note 52, pp. 46-48.

> Those who regard the play [Romeo and Juliet] as immature usually prefer an earlier date [than 1595], insisting that the Nurse's "'Tis since the earthquake now eleven years" (1.3.23), by which she remembers the time of Juliet's weaning, refers to a famous earthquake which struck England in 1580 and that Shakespeare meant to date his play 1591 by having the Nurse mention something that everyone in the audience could date precisely.

J.A. Bryant, Jr., Introduction, in William Shakespeare, The Tragedy of Romeo and Juliet, pp. lxiii and lxix (New York: Penguin Group, 2006) (J.A. Bryant, Jr., ed.) (With New and Updated Critical Essays and a Revised Bibliography) (The Signet Classic Shakespeare) (Sylvan Barnet gen. ed.).
177. Elizabeth Zeman Kolkovich, The Elizabethan Country House Entertainment: Print, Performance, and Gender, pp. 157 et seq. (Cambridge: Cambridge University Press, 2016).
178. Jean Wilson, Everlasting Spring: The Literary and Political Aspects of Country House Revels, Times Literary Supplement, March 3, 2017, p. 29.
179. Richard Dutton, *supra* note 2, p. 134.
180. *Ibid.*, p. 286.
181. *Ibid.*, p. 171.

Yet what of the method and the stages to reworkings productive of the 1599 Quarto? Pollard and Dover discern that "important light"[182] is cast upon these stages/reworkings issues by, e.g., the Acts I and II Prologue sonnets.[183] The Act I Prologues of the 1597 and 1599 Quartos are nonidentical. That Act II Prologue-sonnet already has been discussed. It plausibly can be read as born of pro-Marian contemplation over the house arrest once undergone by the Countess. Discretion might permit indirect disclosure in 1599 (if not 1597) of Marian sympathies, thanks to documented developments during 1597-1599, i.e., intrafamilial reconciliation revolving around Mary.

Pollard and Dover posit that "… it seems a reasonable suggestion that at the time Shakespeare wrote the sonnets for the first two acts he also brought their text very nearly to its final state, …."[184] If the 1599 document could encompass a rewrite ("very nearly to its final state") of whatever breadth, then Quarto One-Quarto Two divergences remain explicable as engendered by good news during the 1597-1599 interval. This Pollard-Dover surmise would befit Quarto Two revisions and insertions (including the addition of a Second Chorus recitation of the Act II Prologue-sonnet) signaling authorial sympathies shifted the more onto the daughter-wife, Verona-Capulet side (that of England's House of Montague) from its opposite side.

For that matter, regarding Lukas Erne's proposition that Quarto Two might directly derive from Q1's commercial success,[185] Weis actually submits: "Conversely, Q2 may have been produced to supersede Q1, an unsatisfactory version of the play, as seems to

have been the case with Q2 of Hamlet and also with Love's Labour's Lost (even though Q1 LLL is lost)."[186] Both Erne's proposition of Quarto Two as fruit of *satisfactory* Quarto One (Quarto One proving boxoffice bonanza), and Weis's idea that Quarto Two springs from dissatisfaction with Quarto One, preclude the 1599 Quarto as *predecessor* of the 1597 text. Either interpretation sustains the credibility of hypothesizing the Second Quarto-begetter's creation thereof while weighing 1597-1599 real-world changes. For Weis's view, like Erne's, denies the 1599 Quarto as predecessor to the Quarto of 1597.

X. CONCLUSION

The preceding pages have recognized a grievous wound (i.e., an accusation against her of infidelity) absorbed by the obtrusively nonfictional Mary Wriothesley. It also has comprehended her dolor's subsequent alleviation through maternal-filial reconciliation with the 3rd Earl of Southampton. The preceding review of those realities might help explicate metamorphosis of the *Romeo and Juliet* 1597 Quarto into the 1599 Quarto. For *Romeo and Juliet*'s author remolded his script as though tactfully to signal some rechanneled fealty toward one contemporary, flesh-and-blood party (identifiable with one of that playscript's warring Veronese families) from another contemporary, real-life figure (correspondingly identifiable with Verona's counterpart embattled clan).

Specifically, authorial sympathies seemingly grew to favor the more Mary Wriothesley (once the 13 year-old bride of the 2nd Earl of Southampton). This shift seemed to spur him to burnish the image of the London stage's daughter-wife-widow Juliet (herself a 13 year-old bride). New authorial sympathies seemingly coalesced at comparative cost to Henry

182. J. Dover Wilson and Alfred W. Pollard, *supra* note 160, p. 434.
183. *Ibid.*
184. *Ibid.*
185. David Riggs, Ben Jonson: A Life, pp. 32-33 (Cambridge: Harvard University Press, 1989); Ian Donaldson, Ben Jonson: A Life, pp. 109, 111, 113-120, 127, 218 and 457n.24 (New York: Oxford University Press, 2011).
186. *Ibid.,* p. 106n.2.

Wriothesley, the 3rd Earl (as successor of his father, Mary's bridegroom). Correspondingly it would shift at cost to the stage's son-husband Romeo or Romeo's kin. The playwright reworked his creation during the span wherein the Wriothesleys' intergenerational reconciliation rendered less indelicate any implicit, onstage exaltation of the woman once shunned by the 2nd Earl and his son. (The dramatist did so by methods discernable to the keen-eyed and keen-eared.) Scarcely by coincidence was Verona's starcrossed lovers' destiny thus reworked as of the 1599 closure (and not before the 1597 beginning) of the reconciliation span. So posits the Marian Theory of the play.

Stanford University Professor David Riggs studied the upshot of uproar during 1597 over Ben Jonson's play *Isle of Dogs*.[187] It remains mysterious why Jonson's play performed in July[188] should have so touched a nerve.[189] Such a turningpoint was Jonson's play in the saga of the English stage that Dr. Riggs concludes: "Previously, the theatre business was fundamentally independent in character; henceforth, the court would increasingly make it an object of scrutiny, patronage and control."[190] Consistently therewith, Dutton understood "1597/8 as a critical year in my narrative,"[191] through post-July 28, 1597, events "which ultimately confirmed the special status of the [Shakespearean] Lord Chamberlain's Men and the Lord Admiral's Men in relation to the court."[192] For:

The 1597/8 settlements put a very public seal, and a financial premium,

on the symbiotic relationship between the Master [of the Revels] and the privileged playing companies….[P]lays by the two privileged companies appeared, advertising themselves variously as revised and/or performed at court. The investments of the Chamberlain's and Admiral's Men in working up enhanced versions of some of their plays for the benefit of the court were very likely implicit thanks—gift offerings—for the privileged positions in which they were now publically installed.[193]

Rather in the same vein, Sohmer presented this insight into the 1597-1599 period:

In 1597, Shakespeare commences to write for two audiences; in the same playhouse—at the same time—he produces both an exoterically entertaining play for casual playgoers *and* simultaneously engages in tense esoteric discourse with a handful of *cognoscenti*, Gabriel Harvey's wiser sort. Shakespeare continues to use (and intentionally misuse) familiar touchstone texts. To the casual playgoer (and censor) Shakespeare's Henriad appeared to rehash Holinshed's hoary history, long in print and widely read, hardly liable to the label of subversive document. But Shakespeare makes minute alterations to Holinshed's tale—rescissions noticeable only to the keen-eared and –eyed– such as shuffling the deathbed encounter between Henry and Hal from the room called "Jerusalem" to the king's bed chamber….[194]

Weigh whether Sohmer's insight could be broadly generalized beyond the Henriad. *Discourse with a handful, keen-eared and keen-eyed.* The instant discussion might

187. David Riggs, Ben Jonson: A Life, pp. 32-33 (Cambridge: Harvard University Press, 1989); Ian Donaldson, Ben Jonson: A Life, pp. 109, 111, 113-120, 127, 218 and 457n.24 (New York: Oxford University Press, 2011).
188. Ian Donaldson, *supra* note 187, p. 111.
189. *Ibid.*, p. 116.
190. David Riggs, *supra* note 187, p. 34.
191. Richard Dutton, *supra* note 2, p. 8.
192. *Ibid.*, p. 30.

193. *Ibid.*, p. 33.
194. Steve Sohmer, *supra* note 58, p. 87 (Sohmer's emphasis).

prove timely not simply due to such serious latterday researches into the evolution of Shakespearean *corpus* quartos, generally, as that of the respected Dr. Jolly and Professor Dutton. Chris Jeffery during 2016 argued for *Romeo and Juliet* as a triple-interplay of play-types: (1) a play of Young Love crushed by elder-generation inadequacies; (2) a play of Tragic Romance; and (3) a play, more macrocosmically, of Elizabeth's Reign because implicitly addressing problems derivative therefrom.[195] The instant discussion comports with Jeffery's latter reading, because the Marian Theory investigates the press upon the theatrical product of Tudor court developments, e.g., a highborn mother-son reconciliation.

Moreover, not even scholars can guess what unforeseen fresh evidence might be disinterred about the starcrossed trio of Mary and the two Earls of Southampton she loved. Only in 2016, Samuel Fallon (of the State University of New York) and General Editor of the Arden Shakespeare David Scott Kastan shared with the world their take on a long-unknown poem. That poem is "attributed to 'H. W. S.', most likely Henry Wriothesley, third earl of Southampton…."[196]

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195. Chris Jeffery, What Kind of Play Is *Romeo and Juliet?*, 28 Shakespeare in Southern Africa, pp. 51-72 (2016).
196. Samuel Fallon and David Scott Kastan, Signature Verses: Two Previously Unknown Fragments of Early Modern Miscellanies, Times Literary Supplement, February 5, 2016, p. 14.

APPENDIX I

ROMEO AND JULIET AS SEQUEL TO *THE TAMING OF THE SHREW*

A. Jointure and Dowry Discussed in The Taming of the Shrew

In the pre-1597 comedy[197] *The Taming of the Shrew*, Baptista boasts a much-in-demand, marriageable daughter, Bianca. She is desired by, e.g., Gremio and Lucentio. Lucentio's servant Tranio will draw-off Lucentio's rivals for Bianca's hand by pretending himself to pursue Bianca.[198] Baptista's marriageable daughter Katherine proves generally undesired. Katherine's solitary suitor is Petruccio. Ann Jennalie Cook recognized: "However mercenary it may seem today, Petruccio's courtship follows a highly conventional procedure, exaggerated enough to make it amusing but perilously close to actual procedure."[199]

In a single scene marital alliances are strategized utilizing language, e.g., dowry and jointure to reappear in *Romeo and Juliet*:

PETRUCCIO   Then tell me, if I get thy daughter's love

What dowry shall I have with her to wife?

BAPTISTA   After my death, the one half of my lands,

And in possession twenty thousand crowns.[200]

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197. Sarah Werner, The Taming of the Shrew, in The Norton Shakespeare, pp. 343, 353 (New York: W.W. Norton & Company, 2016) (3rd ed.) (Stephen Greenblatt gen. ed.); Jonathan Bate and Eric Rasmussen, The Taming of the Shrew, in William Shakespeare, Complete Works, *supra* note 42, pp. 526, 529.
198. F.E. Halliday, A Shakespeare Companion 1564-1964, p. 500 (Penguin Books).
199. Ann Jennalie Cook, Making a Match: Courtship in Shakespeare and His Society, p. 139. (Princeton: Princeton University Press, 1991).
200. The Taming of the Shrew, Act II, sc. 1, lines 119-122: The Norton Shakespeare, *supra* note 197, p. 376; The Taming of the Shrew, Act II, sc. 1, lines 117-120: William Shakespeare, Complete Works, *supra* note 197, p. 549.

Dowry. Katherine's dowry is not unlike a bribe for the avaricious Petruccio to take her from her father's hands. Holds Cook: "As for getting Kate's love, Baptista seems motivated less by concern for her wishes than by fear of her temper."[201] Thereby it tends to reflect negatively upon Katherine.

Baptista informs Gremio and Tranio-for-Lucentio how to attain Baptista's precious Bianca:

> BAPTISTA   'Tis deeds must win the prize, and he of both
>
>   That can assure my daughter greatest dower
>
>   Shall have my Bianca's love.[202]

Cook understands that dower and its alternative, jointure, each runs (albeit not identically) to benefit females: "[T]he auction centers on what each candidate bids as dower, or jointure, for Bianca's widowhood."[203] Such a pearl of great price proves Bianca before bedazzled Gremio and Tranio-for-Lucentio that Cook, cognizant of deep difference dividing dower (to be offered by a suitor) from dowry (to be offered by a bride's father) highlights of these suitors: "Incredibly, they ask for no dowry, and Baptista offers none."[204]

Thus, the aggressive Tranio-for-Lucentio offers:

> TRANIO   If I may have your daughter to my wife,

I'll leave her houses three or four…

** *

* * *

 Besides two thousand ducats by the year

Of fruitful land, all which shall be her jointure.[205]

Jointure.

As a jointress-wife, Bianca could expect upon her widowing to acquire much of her husband's estates. Cook perceptively points out: "[W]hat Shakespeare's audience would also have seen is a bankrupting [of the groom] jointure for a bride with no formal promise of a dowry [for the groom]."[206] To net Bianca, both bachelors bid energetically against one another. Kate, to the contrary, must bear a bonus, paternally-promised, paying for her shot at being husbanded. Thereby this tends to reflect flatteringly upon Bianca, who weds ardent Lucentio.

Quaere, whether this retrospect upon uproarious fun in *The Taming of the Shrew* overreaches for background informing the exploitations of dowry and jointure in the Quartos of the *Romeo and Juliet* tragedy's Quartos (notwithstanding that each tale entails future spouses' first meeting, the wooing and their wedding plus its aftermath).

201. Ann Jennalie Cook, *supra* note 199, pp. 140-141.
202. The Taming of the Shrew, Act II, sc. 1, lines 340-342: The Norton Shakespeare, *supra* note 197, p. 381; The Taming of the Shrew, Act II, sc. 1, lines 347-347: William Shakespeare, Complete Works, *supra* note 197, pp. 553-554.
203. Ann Jennalie Cook, *supra* note 199, p. 141.
204. *Ibid.*

205. The Taming of the Shrew, Act II, sc. 1, lines 363-364 and 367-368: The Norton Shakespeare, *supra* note 197, p. 382; The Taming of the Shrew, Act II, sc. 1, lines 367-368 and 371-372: William Shakespeare, *supra* note 197, Complete Works, p. 554.
206. Ann Jennalie Cook, *supra* note 199, p. 141.

B. Two Families, a Generation Later

At the Capulets' masque Old Capulet volunteers that not for decades have he and his cousin both masqued, never since the marriage of Lucentio. It almost sounds as if Old Capulet had participated in *The Taming of the Shrew* festivities firsthand, and beside Cousin Capulet to boot. To be sure, the *Shrew*'s Lucentio, being the son of Vincentio of Pisa,[207] seems someone scarcely prone to render an appearance at distant Verona's Capulet gala.

Never discount the *Romeo and Juliet* author's attention paid that play's offstage Lucentio. While Cousin Capulet insists these Lucentio festivities lie thirty years remote, Old Capulet will demur with fervor:

> CAPULET   What, man, 'tis not so much, 'tis not so much:
>
> 'Tis since the nuptial of Lucentio,
>
> Come Pentecost as quickly as it will.
>
> Some five-and-twenty years, and then we masque.
>
> COUSIN CAPULET   'Tis more, 'tis more, his son is elder, sir,
>
> His son is thirty.
>
> CAPULET   Will you tell me that?
>
> His son was but a ward two years ago.[208]

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207. F.E. Halliday, *supra* note 198, p. 290.
208. Romeo and Juliet, Act I, sc. 5, lines 34-40; Rene' Weis, *supra* note 5, pp. 168-169.

Steve Sohmer submits that, speaking during the days wherein *Romeo and Juliet* is set (July 1582) Old Capulet's wardship point is that an illegitimate cannot inherit. That bar tends to exclude as a ward any son of age as great as that of his father's marriage.[209] Were a ward no older than 20 two years past, the boy could be no older than 22 today, i.e., born legitimately within Old Capulet's "some" 25 years-framework. Whereas Cousin Capulet's claim concerning 30 years of age must make the son a bastard because born half a decade before Old Capulet's 25-years-framework.

Actually, statutes in Renaissance Verona (whether or not in Pisa) encompassed no special provisions addressing illegitimates.[210] Still, paternal sensitivity of Old Capulet to marital progeny-propriety perhaps exists as emphasis (in the playgoer's mind) of the weight of the forthcoming secret marriage of spotless dove Juliet (and her stealthy consummation thereof beneath his own roof). Imagine the disgrace had Lucentio's son been born of Bianca (the gentle dove) before holy wedlock. Such shame should be unspeakable: *Will you tell me that?*

C. The Playwright's Public Proof His Stories Overlap Precisely

Old Capulet's impending Pentecost (of May 1583) reference seems, superficially, meaningless within *Romeo and Juliet*. It hinges upon interplay of the old Julian and new Gregorian calendars.[211] During the span of dual-calendars that feast's date repeated every quarter-century, and 1583 must mark the initial such repetition.[212] Sohmer sees:

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209. Steve Sohmer, *supra* note 58, pp. 49, 54 n. 63.
210. Thomas Kuehn, Illegitimacy in Renaissance Florence, p. 75 n. 17 (Ann Arbor: University of Michigan Press, 2002).
211. Steve Sohmer, *supra* note 58, p. 49.
212. *Ibid.*

"Pentecost in Gregorian 1583 was Sunday 29 May—the same date on which Pentecost fell when Lucentio married in Julian 1558. Old Capulet is right."[213] This reminds the more knowing sort of *Romeo and Juliet*'s readers of the importance of time therein.

Sohmer's calendars show *Romeo and Juliet*'s creator clearly concentrated on Old Capulet's *Shrew*-evoking passage embracing Lucentio. The inarguable calendars confirm he cared that his more knowing sort of readers see: (1) Old Capulet's awareness of the interplay of a son's birthday (after the timeframe of *The Taming of the Shrew*) and Lucentio's weddingday with Bianca (during that timeframe); and (2) Old Capulet's sensitivity to marital propriety--a pressure in *Romeo and Juliet*; and (3) the grave import of time in the *shared* world of two plays. Thanks to this interplay, theatrical background informing its author's *Romeo and Juliet*-two act romantic comedy and three act tragedy unmistakably *is* his *The Taming of the Shrew*-comedy, dowry and jointure and all.

D. Those Lines Are the Dramatist's Own, Indeed

By contrast to Pisa's Lucentio, the *Shrew*'s roisterous Petruccio himself haled from Verona, some *Shrew* scenes being laid in his countryhouse neighboring that city.[214] If contemporary to Old Capulet and Cousin Capulet, then Petruccio's masquing days likewise lie behind him. Old Petruccio thus would prove less likely to attend a Capulet gala presumably better suited to the younger generation of Tybalt, Juliet and Romeo. Sure enough, a noteworthy satellite of roisterous Tybalt[215] does attend: "young Petruccio."[216]

Young Petruccio nowhere appearing in the Second Quarto but here and in an Act III stage direction, Boyce explains: "Such a Ghost character is taken as evidence that the published text in which he first appears—in this case Q2 (1599) of *Romeo and Juliet* --was printed from Shakespeare's own manuscript, or FOUL PAPERS, and thus is especially authoritative."[217] In truth, this "young Petruccio" participating in the party yokes the Paduan comedy with the Veronese tragedy in the First Quarto[218] as truly as in the Second Quarto cited by Boyce. Someone authoritative took care to invite "young Petruccio," perchance. Petruccio and Lucentio bridge, between them, *The Taming of the Shrew* with *Romeo and Juliet*.

Hence, heedful of Lucentio's wedding as backdrop to *Romeo and Juliet,* its First Quarto audience or knowing reader remembers dowry concerns the *beginning* of a marriage as a *cost* to the *bride* (here, recent-bride Juliet as represented by Capulet). In consequence, Capulet's First Quarto handclasp surrendered a Capulet hand. Jointure (Second Quarto) concerns the *wake* of a marriage as a *benefit* to the *widow* (here, recently-widowed Juliet as represented by Capulet). Thus, in their Second Quarto handclasp Capulet generously settles simply for surrender by Montague of a Montague hand.

213. *Ibid.*
214. Charles Boyce, *supra* note 95, p. 690.
215. *Ibid.*, p. 498.
216. Romeo and Juliet, Act I, sc. 5, line 130; Rene' Weis, *supra* note 5 p. 177.

217. Charles Boyce, *supra* note 95, p. 498.
218. Hilary Mantel, How Do We Know Her?, London Review of Books, February 2, 2017, pp. 3, 5. *supra* note 5, p. 361.

APPENDIX II

MANTEL MARKS MARRIAGE'S MERCENARY BACKDROP TO WIDOWHOOD

In 2017, Hilary Mantel shared her informed interpretation of the practical, property-minded, profit and loss-like logic motivating the upperclass, sixteenth-century English wife:

> In theory, after she married, a [sixteenth-century English] woman's personal property and real estate were at her husband's disposal. In practice, prenuptial agreements, trusts and the legally sanctioned breach of entails created some flexibility. Most aristocratic women outlived their husbands, and once a woman was widowed she was able to assert her independence and have a say in her family affairs, while cultivating the trope of the "defenceless widow" in any dealings with the authorities. When historical novelists are looking for ways to empower their heroines they opt for making them hotshot herbalists or minxy witches. But literacy was their usual weapon, not spells, and many of them picked up enough legal knowledge to fight their corner in civil disputes. As widows, or as deputies to living husbands, they handled complex legal and financial affairs with aplomb, while assenting—outwardly at least—to their status as irrational and inferior beings. Gaily agreeing that the chief female virtues are meekness and self-effacement, they managed estates, signed off accounts, bought wardships and brokered marriage settlements, all the while keeping up a steady output of needlework.
>
> In some cases, they conspired against the crown while claiming, if it went badly, that their weak female brains had been addled by male influence, and that "fragility and brittleness" allowed their trust to be easily abused.[219]

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219. Hilary Mantel, How Do We Know Her?, London Review of Books, February 2, 2017, pp. 3, 5.

APPENDIX III

EMINENT SCHOLARS ILLUMINATE CAPULET/MONTAGUE DIALOGUE

A. Ann Jennalie Cook's Insight

Ann Jennalie Cook of the Sewanee School of Letters has served on the Board of the Folger Shakespeare Library, and as Executive Director of the Shakespeare Association of America. She was named a Life Trustee of the Shakespeare Birthplace Trust (Stratford-Upon-Avon). She proved herself properly sensitive to jointure and dowry in *The Taming of the Shrew.*

Cook introduces chapter four, entitled Dowries and Jointures,[220] of her instructive *Making a Match: Courtship in Shakespeare and His Society* with: "Money can be a troublesome issue in any marriage, but the Elizabethans tried to settle economic arrangements before a wedding took place."[221] Thereby:

> From the bride's family came a dowry, or portion, as it was called, consisting of money, lands, and valuables like jewels or plate. This portion was payable at the time of the wedding or in installments shortly thereafter. From the groom came the dower (not to be confused with dowry), or jointure, that his new wife would receive should she be widowed and thus become a dowager.[222]

Moreover:

Since a dowry, though customary, was not required for a valid marriage, no laws compelled its payment. Instead, the parties signed a contract which then could be enforced in the courts. However, English law carefully delineated all women's rights to dower, partly to see that widows did not become a charge upon society and partly to prevent husbands from abrogating those rights out of perversity or anger.[223]

Also: "While the dower vested only at widowhood, the jointure represented a gift made to the wife or the couple, either before or after the wedding, as 'a present possession' from the husband or his family."[224]

Consequently would one anticipate Cook's eagle-eyed fix upon the two *Romeo and Juliet* quartos' divergence over these two topics, tied to the Capulet-Montague handshake. In her chapter eight, entitled Secret Promises, Broken Contracts,[225] Cook quotes from the jointure dialogue to thereupon conclude: "With equal offers and clasped hands, the parents enact the spousal agreement that should have preceded the marriage of the young lovers, were it not for the feud. As the momentarily widowed wife of Romeo, Juliet will have from the Montagues a golden jointure equal to the golden dowry she brings from the Capulets"; Cook fancies that thereby "their fathers tender belated offers of dower and dowry."[226]

Cook discounts or disregards that each father respectively accepts, successively, a mere handshake as dowry from Capulet (First Quarto) and mere handshake as jointure from Montague (Second Quarto). Jointure largely eclipsing dower in practice, *those* two

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220. Ann Jennalie Cook, *supra* note 199, pp. 120-150.
221. *Ibid.,* p. 120.
222. *Ibid.,* p. 121.
223. *Ibid.,* p. 122.
224. *Ibid.,* pp. 122-123, citing The Lawes Resolutions of Womens Rights, p. 182 (London: 1632).
225. *Ibid.,* pp. 185-233.
226. *Ibid.,* p. 210

nouns (*not* dowry) were interchangeable in everyday usage.[227] Notwithstanding that everyday usage: (1) in 1597-1599 England (i.e., July 1582 Verona) jointure and dower legally were mutually exclusive; and (2) in Quarto Two jointure expressly is invoked; (3) therefore, Quarto Two precludes dower. Properly enough, Quarto Two's paternal dialogue omits Cook's "dower" altogether ("belated offers of dower and dowry").

Making a Match: Courtship in Shakespeare and His Society's "offers of dower and dowry" paints it as insufficiently attentive to shifting outlook hinted by authorial replacement of dowry (First Quarto) with jointure (Second Quarto). This verbal transfiguration passes unremarked therein.

B. David Bevington's Insight

That handclasp gesture vividly ties to peace and mutual forgiveness. Therefore one turns expectantly to David Bevington's *Action Is Eloquence: Shakespeare's Language of Gesture*.[228] Bevington is the University of Chicago's Phyllis Fay Horton Distinguished Service Professor Emeritus in the Humanities and in English Language & Literature, Comparative Literature, and the College. Professor Bevington edited Shakepeare's complete works in the Longman edition, and likewise in the Bantam Classics paperback editions. He was elected a Fellow of the American Academy of Arts and Sciences.

Dr. Bevington's contribution to the dowry-jointure investigation runs: "Old Capulet in *Romeo and Juliet* quarrels with his daughter over her marriage, and is left at last with the futile role of bargaining with Montague over a bridal portion for the young

woman who is now married to her deathbed."[229] Doubtless, Bevington announces the way the play ought best have been completed.

By contrast, the Second Quarto and First Folio have Old Capulet spontaneously accepting a handshake as his late daughter's symbolic jointure. Old Capulet's language of gesture (accepting a handshake) is eloquent. Yet Old Capulet does so in performance (handclasp) unnoticed by Bevington. And Old Capulet does so in gesture-language (handclasp as symbolic jointure) contradicted bluntly by Bevington ("bargaining with Montague"). For in neither First nor Second Quarto nor that Folio does Old Capulet bargain at all, let alone (Bevington's more poignant specification) bargain futilely.

C. Northrop Frye's Insight

Canada's late Northrop Frye was named University Professor by the University of Toronto during 1967. He served as Norton Professor at Harvard University over 1974-1975. He received the Governor General's Literary Award, was a Companion of the Order of Canada, and in 2000 appeared on a postage stamp. He wrote the widely-hailed literary theory study, *Anatomy of Criticism*.[230]

Professor Frye underscored the underlying tragic potency in *Romeo and Juliet* of its feud in itself, notwithstanding other variables influencing its rush of events, e.g., pure chance mishaps, and even astrology[231]:

This, I think, is the clue to one of those puzzling episodes in Shakespeare

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227. *Ibid.*, p. 122.
228. David Bevington, Action Is Eloquence: Shakespeare's Language of Gesture (Cambridge: Harvard University Press, 1984).

229. *Ibid.*, p. 145.
230. Northrop Frye, Anatomy of Criticism (Princeton: Princeton University Press, 1957).
231. Northrop Frye, Northrop Frye on Shakespeare, p. 31 (New Haven: Yale University Press, 1986) (R. Sandler ed.).

that we may not understand at first hearing or reading. At the very end of the play, Montague proposes to erect a gold statue of Juliet at his own expense, and Capulet promises to do the same for Romeo. Big deal: nothing like a couple of gold statues to bring two lovers back to life. But by that time Montague and Capulet are two miserable, defeated old men who have lost everything that meant anything in their lives, and they simply cannot look their own responsibility for what they have done straight in the face….And so with Montague and Capulet, when they propose to set up these statues as a way of persuading themselves they're still alive, and still capable of taking some kind of positive action. The gesture is futile and pitiful, but very, very human.[232]

At least against the background of Quartos One and Two jointly, Frye properly characterizes the Capulet-Montague dialogue as a puzzling episode not to be understood at initial reading or performance.

Nevertheless construable in context of Quartos One and Two jointly is the dialogue's overt dowry/jointure language-revision as mildly indicative of somewhat shifting blame for the anguished, shared *Romeo and Juliet*-backstory of the Countess of Southampton and the 2nd and 3rd Earls of Southampton. For the Southampton-son is prodded very gently to look straight in the face the two Southampton males' own responsibility for what they have done. To be sure, said changes to the dialogue's wording (and circumstantial implications thereof) might mark an episode too challenging to be comprehended for four centuries. *Quaere*, whether such latter episode so proved puzzling as to leave even Northrop Frye uncomprehending.

D. Peter Holland's Insight

The University of Notre Dame's Peter Holland is its McMeel Family Professor in Shakespeare Studies, Department of Film, Television and Theatre Concurrent Professor, English. He is general editor (with Stanley Wells) of the Oxford Shakespeare Topics series, and editor of *Shakespeare Survey*. Regarding *Romeo and Juliet*'s close, Dr. Holland teaches:

> The lovers will be memorialized in the gold statues that the two fathers will pay for, an emblem of the parents' feuding turned into competitive symbols for their grieving. Even a public expression of grief now becomes a place to represent wealth. But the feud will have the possibility of a formal end in the handshake that precedes the offer of the statues, and the handshake itself is an expression of a new kind of kinship:
>
> > O brother Montague, give me thy hand.
> >
> > This is my daughter's jointure, for no more
> >
> > Can I demand.
> >
> > (V.3.296-298)
>
> Montague and Capulet can now be brothers, not a direct expression of a blood kinship structure but a definition of an emotional bond between them. Yet the brotherhood still involves the transfer of a dowry for the marriage, a dowry that has no monetary value, only a bonding between the two men.[233]

233. Peter Holland, *Introduction,* in Romeo and Juliet, pp. xxix, xxxiii-xxxiv (New York: Penguin Books, 2016) (Peter Holland ed.) (The Pelican Shakespeare).

Here Holland accurately quotes the Quarto Two *acceptance by* Capulet of "jointure" (if merely symbolically: "has no monetary value"). But he inaccurately paraphrases it as "transfer of a dowry." A dowry must *transfer from* Capulet. Therefore, Capulet could not *accept* it. Holland paraphrases inaccurately because he equates 'jointure' with 'dowry.' During 2018 as in 1599 these run in *opposite* directions. (One cognizant of *The Taming of the Shrew* learns as much.) Hence, Holland cannot discern the *different* endings of the First and Second Quartos.

Sue Matheson

Woman's Selfhood Presentation from Carol Shields to Indigenous Women Writers

by Ying Kong, University College of the North,

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INTRODUCTION

As one who came of age on a collective farm during the Cultural Revolution in China, and who once believed in the Party's image of the self as a selfless public servant, I hope I can be forgiven my lasting fascination with Western concepts of the individual and individual rights. In 1997 I met Carol Shields at a conference at a university in the northern city of Harbin where I lived and taught before I came to Canada. She was talking about *The Stone Dairies* shortly after it was awarded the Pulitzer Prize. Although at that time I did not know much about the relationship between life writing and identity formation, the particular way in which the fictional autobiographer, Daisy Goodwill, imagines herself and her life appealed to my curiosity and desire to know more about the subject. A year later I came to study at the University of Manitoba for my doctoral degree in the history of the selfhood and life writing, under the supervision of Dr. David Williams.

During my years of teaching Chinese Literature for the University of Winnipeg, I couldn't help associating my academic training in Occidental literature with my course offerings in Oriental culture. I compared Western selfhood and its self-creation with Chinese collective selfhood and life writing. My research paper, "*Dictionary of Maqiao*: Meta-fiction of Collective Biography," were published in both English and Chinese. They were well received by English and Chinese readers. When I taught Canadian Literature, Indigenous Women and Literature at the University College of the North, 60 percent of the students were Aboriginal, so instinctively I made comparative readings of the self in a middle-class white woman's works with that of indigenous women writers' works. My students were so interested in the comparative readings that some of them are studying in my Indigenous Literature of the World class to satisfy their curiosity on selfhood presentation between main-stream literature and indigenous literature.

The aims of my comparative research are not just limited to selfhood formation and presentation in indigenous women's' literature and culture but in a large range of life writing forms: oral, written and digital writing. My starting point is to understand the roots of selfhood, what Charles Taylor calls the "Sources of the Self," or what my advisor sees as the self-contained book of Occidental selfhood, which is neatly summed up by Rene Descartes: "I think therefore I am." But what about a remote village in Nigeria where people, especially women, are not trained to read or given the right to think? My second general aim is to see how that notion of selfhood evolves and changes in new

historical and cultural contexts. My third and more important aim is to read literature comparatively in the light of historical, cultural, and technological change so that we can better understand the world, whether we see ourselves as part of the mainstream or as Aboriginal culture.

SELFHOOD FORMATION AND CULTURAL CONDITIONS

Selfhood is the quality that makes a person or thing different from others. Selfhood formation and evolution is very much bounded by the culture and society in which the self exists. Selfhood as a cultural presentation in literature is the game that authors play, in which the individual attains selfhood. Culture, in this narrative theory of selfhood, determines the forms of selfhood. We tell stories which are socially acceptable in terms of a dominant cultural script. Auto/biographical narrative is thus founded in social relations; as Eakin puts it, "identity is conceived as relational"(56). Autobiography, therefore, "offers not only the autobiography of the self but the biography and autobiography of the other." This idea does not only apply to Shields's *Small Ceremonies* as a meta-narrative of life writing that demonstrates how biography is necessarily a form of autobiography, a "translation" of one's life into another form, but also raises moral questions about the propriety of life writing. Shields adopts the form of fictional autobiography to discuss some of these biographical issues. Judith Gill, the first-person narrator of her autobiography, confesses to a moral dilemma in being a biographer: because biography is about someone else, she has a moral obligation to be fair to the subject or, in some way, to honor the subject.

In contrast to Shields, Tsitsi Dangarembga uses self-referential autobiography to tell stories of women in her culture. The narrator, Tambu, is very straightforward, "I was not sorry when my brother died" (1). Obviously, it is unusual for a sister to reveal her coldness in the face of her brother's death. However, this cruel revelation immediately serves as a trope for the narrator to tell stories about her family members: "For though the event of my brother's passing and the events of my story cannot be separated, my story is not after all about death, but about my escape and Lucia's; about my mother's and Maiguru's entrapment; and about Nyasha's rebellion."

As a white female author, Shields is more concerned about the paradox of privacy in life writing. Auto/biographical ethics are a concern for Judith Gill, who feels that she must be ethically responsible to both her own story and those of others. One theorist of life-writing suggests that "we talk in this way…because we are disciplined to do so by 'social accountability'": "what we talk of as our experience of our reality is constituted for us largely by the *already established* ways in which we *must* talk in our attempts to *account* for ourselves—and for it—to the others around us…. And only certain ways of talking are deemed legitimate'" (Eakin 62). Thus, Paul John Eakin points to ways in which our various selves are shaped, if not determined, by culture. Shotter's theory of "social accountability" suggests that we fashion ourselves according to the available cultural models (62-63). The danger that Judith Gill's career points to is the violation of another's privacy. How much privacy should be revealed in a biography is one of Shields's lasting concerns. In "Narrative Hunger and the Overflowing Cupboard," for example, Shields confesses: "I suffer a sort of scavenger's guilt" (21). She shows how biography

always risks betraying the subject; at the same time she also seeks a solution to this moral problem.

Born into a white middle-class family in the United States, Carol Shields chooses to write the life stories of her own class. Most of the female characters in her books are writers, such as Judith Gill, a biographer in *Small Ceremonies*, or Charleen Forrest, a poet in *The Box Garden*, or Mary Swann, a dead poet, or Reta, a writer of multiple genres in *Unless*. Even in her biography, *Jane Austen*, Shields imagines Jane Austen to be herself, as one who died of a kind of unknown cancer. Shields claims to write "a real biography" about "writers written by writers" (Eden 147).

My favorite character is Daisy Goodwill, an ordinary woman in *The Stone Diaries*, who imagines her life from birth to death through almost a century. Even though Shields is sensitive to a cultural shift in concepts of the self, all the characters in Shields' stories invent new ways of living or new forms for self-creation to overcome the disease of solipsism in Western culture. It is no accident that Carol Shields chooses to write books which neither simply reproduce the history of the self as authorized by the book, nor merely to follow the models of her predecessors. Instead, she questions both traditional and modern forms of life writing by combining and paralleling them in her writing. Shields goes beyond models of historical, philosophical, and poetic self-presentation to find new ways and new forms for self-representation in life writing.

For Tsitsi Dangarembga, a black female who experiences double prejudice in a patriarchal and colonized society, a woman's voice is more important. She gives a strong voice to her narrator, Tambu, a black girl who has no right to an education if there is a male heir in the family. The death of the only boy in her family would grant her the rare opportunity for the education she has longed for. When gender and patriarchal oppression are so prevalent in Rhodesian culture, "voicing is self-defining, liberational, and cathartic" (Uwakweh 75). For Dangarembga, as long as the narrator or the implied author, occupies "an interpretive position, a perspective that is necessary for our appreciation of the new insights she acquires about her experience as female in a patriarchal and colonial society," writing down stories to give a body to her traditions and culture is more important than the ethical issues Judith worries about in *Small Ceremonies*. As Uwakweb points out, these African writers "seem to content themselves with an appeal to their readers' voyeuristic inclination rather than to their general interest in the predicament of the African woman" (76). Through the narrator, we see the dominant figure, Babamukuru, the head master of a mission school. He is haughty, authoritarian, unsympathetic, and a bully who suppresses the women's voices in his family. The story of Maiguru, who receives a high education in England, is trapped in a relational self. On one side she wants her children to retain the mark of distinction they have achieved from living in a Western society after they returned to Rhodesia; and on the other side, she is suppressed by her patriarchal husband, Babamukuru. Nyasha, the daughter of Babamukuru and Maiguru tries very hard to maintain the self she wants to be. But her status as a product of two worlds, Africa and Europe, hinders the development of an integrated self. Her independence in thinking leads to self-hatred, a dangerously negative body image that results in an eating disorder, and mental illness. Nyasha becomes a symbolic victim of the pressures to embrace modernity, change, enlightenment, and self-improvement. Tambu, the child adopted by her uncle, Babamukuru, narrates her efforts to be recognized by

both worlds as a young and an adult self. In the end she decides to leave her community for self-improvement. Although the female voice promises a fresh insight into women's reality and experiences that are generally inaccessible to the male tradition, "it is not a very elaborate or sophisticated literature in terms of style, innovation or techniques" (Uwakweh 76).

A relational self is still important in Western discourse. Shields's second novel, *The Box Garden*, belongs to a long tradition of social novels which make the self "a product of social discourse" (65). It gives an alternate version of Judith's account of the McNinn family history, illustrating how a lonely autobiographer must overcome "the most debilitating of diseases, subjectivity" (109), to write herself out of "the box garden" of solipsism. Charleen Forrest, Judith's sister, turns to writing poetry out of her own social and narrative malnutrition in childhood. But, instead of expressing herself through poetry, Charleen buries "the greater part of [her] pain and humiliation" (152); and finally, she locks herself up in a "box garden," retreating to a visible form of solipsism. At the same time, she likes to think of herself as "a bit of a mystic" (83), holding out the hope of an eternal self. By tracing Charleen's differences from Judith, Shields provides another version of the McNinn family history with a new eye to preventing or curing a "hereditary disease" (126).

Using Charleen's story, Shields reinforces Charles Taylor's moral view of the self: "I am a self only in relation to certain interlocutors; in one way in relation to those conversation partners who were essential to my achieving self-definition…. A self exists only within what I call 'webs of interlocution'" (36). Or, as Paul John Eakin describes

it, the self is "a product of social discourse" or, at the very least, "a self-created aspect of concrete social dialogue" (65).

SELFHOOD DEVELOPMENT AND SOCIAL CONDITIONS

Coming from different backgrounds, indigenous women writers face different issues in their traditions and cultures. In Doris Pilkington's *Rabbit-Proof Fence* the female characters are Australian Aboriginal girls who escaped from their school; in *Nectar in a Sieve* by Kamala Markandanya a South-Indian child bride is married to a tenant farmer who becomes a victim of poverty and industry; and in *The Slave Girl* by Buchi Emechta a Nigerian woman is sold as slave. Those marginalized women knew absolutely nothing about selfhood or individual rights, to say nothing of privacy. To survive, these women have to form, develop, or even to cultivate a communal or collective selfhood that serves as a means of survival for these grassroots characters. To transform the self or to rebel against the culture, a woman has to leave her community as in Yang Erche Namu & Christine Mathieu's *Leaving Mother Lake: A Childhood at the Edge of the World*. Even in life writing, two authors must collaborate to present their collective stories. In Tsitsi Dangarembga's *Nervous Conditions*, even though the young female character chooses to embrace another culture, the title of the book already suggests the inner conditions of the colonized subject.

In Shields' works, the lonely self of a white-middle class woman is very striking. The urge of her female characters is to extend the self to or to develop a relational self in her circle. What Shields focuses on in her writing is to create an autonomous self

who struggles to overcome her resulting solitude in an imaginative narrative such as Charleen in *The Box Garden* and Daisy Goodwill in *The Stone Diaries*. However, in works by indigenous women writers, the female voice is silenced in a patriarchal or colonized culture in which "silencing comprises all imposed restrictions on women's social being, thinking, and expressions that are religiously or culturally sanctioned" (Uwakweh 76). Women suffer double prejudices—gender and colonization, so the collective or relational self helps a Nigerian woman to survive when she is sold into slavery in Bunchi Emecheta's *The Slave Girl*. Selfhood is so constrained within its own culture that women must leave their communities to transform their selfhood. Namu had to leave her Moso village, "the country of daughters" (Yang 17), and Tambu, was "too eager to leave the homestead and embrace the 'Englishness' of the mission" (Dangarembga 68).

Questions of self-representation are among Shields's most important concerns. In her discussion of John Barth, she had already noticed that fiction writing has "its gaze on the question of self and the nature of self-identity" ("Narrative Hunger" 30). Shields' fascination with life writing and her concerns about self-representation are also part of a more general cultural fascination with how the self may represent itself in literary works. As she observes, self-representation exists in "the narrative arc our culture has sanctioned, [in which] stories form a more communally conscious culture that is more likely to say 'Who are we?' rather than 'Who am I?'" Selfhood presentation in Shields's writings is more sophisticated and entertaining but the miserable self in the indigenous women's writing is more touching and thought-provoking.

A Nigerian woman writer, Buchi Emecheta, tackles the subject of the relational self in *The Slave Girl* from the opposite direction. Agbanje Ojebeta was born in a village in Ibuza near the Niger River. Quite opposite to the patriarchal culture, the little girl became a treasure in a family which already had two sons. In their culture, the girl is identified by charms before the age of five. "They were then regarded as having walked out of childhood and became members of the living world" (Emecheta 45), which means that the self has to develop into "a product of social discourse." According to Eakin, "the extended self," "the private self," and "the conceptual self" will develop by the age of five (22-23). However, Ojebeta became so dear to her parents that they wanted to "keep Ojebeta a baby as long as possible" (Emecheta 45). Physically the girl carries "the charms for so long as insurance that she would survive." What is more, she also carries "intricate tattoos" on her face (46), which has become a permanent identity for this young girl. Psychologically, Ojebeta does not develop the self into "a product of the social discourse" at an appropriate age. She depends on her parents before they were killed by an epidemic called "felenza." When her two brothers couldn't support her, she was sold by one of them as a slave to a wealthy woman, Ma Palagada, whom Ojebeta lives with until Palagada passes away. When the charms were ordered to be cut off the moment she became Palagada's slave, emotionally Ojebeta found that her identity was lost: "She saw the charms which had been tied on her by her loving parents, to guide her from the bad spirits of the other world, filed painfully away. The cowries, too, which hung on banana strings were cut off with a big curved knife. She now cried in her heart which was throbbing up and down as though it would burst, as the hard lesson made itself clear to her that from this moment on she was alone" (Emecheta 71).

Ojebeta is a good illustration of Eakin's theory of the body image: "the body…is the brain's absolute frame of reference" (19). For Ojebeta, the charms were cut off, but the tattoos remain in her face which frames her relational self. When her master dies, "she had not yet made up her mind about whether she still wanted to go back to Ibuza at all" (Emecheta 11). Although Ojebeta hangs on to her relational self to the Ibuza community where "land was a communal holding," and "no woman is ever free. To be owned by a man is a great honor" (158). In the end, Ojebeta chooses to marry a man from her own community: "I feel free in belonging to a new master from my very own town Ibuza; my mind is now at rest." Ojebeta is locked in that permanent tattooed self: "Ojebeta, now a woman of thirty-five, was changing masters" (179).

SELFHOOD IN ALTERNATIVE AND COLLECTIVE WRITINGS

When selfhood disappears from records in life writing, Shields demonstrates how to create alternative versions of the self. After exposing how the biographical record is pruned, devalued, fabricated and remade, Shields suggests that the "life" of a dead poet can be made to live in our continuing performance of "communal history" by going back to oral culture, as well as to film as a modern version of orality. She also adopts alternative narrators to show the possibility of communal writing of an autobiography in *The Stone Diaries*. In the case of Mary Swann, a lonely soul who is barely known to the public becomes alive audibly and visually. Daisy Goodwill, in her old age, imagines her life stories told by multiple witnesses and narrators. Having multiple versions of her own life stories, Daisy Goodwill entertains her audiences with multiples selves. No matter whether it is a biography of Mary Swann or a fictional autobiography of Daisy Goodwill, what we have in front of us are the multiple selves imagined or created in communal history. But how is it possible to do that with a real event in the lives of three Australian aboriginal girls in 1931, when they escaped from the school along a 1600 km rabbit fence?

Doris Pilkington gives a highly personal account of one Aboriginal family's experiences as members of the Stolen Generation – the forced removal of mixed-race children from their families during the early 20th century. The three girls are Daisy, Grace, and Molly who is Pilkington's mother as well. By the time Pilkington started her book, one of her aunts had died. Contrary to Shields who creates a "mystery of a life" by creating a communal history and a collective history in a fictional biography, in these stories of the three girls, Pilkington must create a communal self that represents aboriginals rebelling against British colonization. As Pilkington acknowledges, their trek back home is "not only a historical event; it was also one of the most incredible feats imaginable, undertaken by three Aboriginal girls in 1930s" (xi). To reconstruct the trek home from the settlement sixty years later, Pilkington has to go beyond the borders of time and space so that she could depict the geographical and botanical landscape in early 1900 and the gravel or dirt roads replaced by highways today. "Molly was pleased that the mud and slush and the swamp paperbarks were behind them. They were now on the heathlands. The heathlands of Western Australian contain some of this country's most beautiful and unusual wildflowers. The girls stood among the banksia trees admiring the sandy plants" (83). In addition to research on historical records of the event and many

interviews with her older aunts, she also has to use her "vivid imagination, the patience of many saints and the determination to succeed" (xi).

First Pilkington needs to double the memories—that is the depiction of the memory of the younger self of the two aunts and her own childhood memory of the surroundings of the settlement. By merging the writer's and the speakers' memory with that of her subject, Pilkington enables the revision of the event. Immersing herself in the consciousness of her subjects, she merges her personal memory with her two aunts'. Thus memory becomes communal and not private; a private self or individual self becomes a communal or collective self. Second, the collective memory enables the author to create a new identity of her aunts and mother who did not yield to the colonized institutions of the time and who help the writer to revisit her cultural traditions. In recovering the historical event, Pilkington has to violate aboriginal customs. For example, in her interviews, her mother and aunt refer to their dead sister Grace as "the sister we lose 'em in Geraldon" or "your aunt" (xi) because traditional Aboriginal culture requires that the name of a dead person is never mentioned after their death. In Pilkington's writing, however, she simply calls them Molly, Daisy, and Grace.

Linda Hutcheon has noted, "history's problem is verification, while fiction's [is] veracity" (112). Thus, the argument in Pilkington's personal accounts of a historical event deals with the ways in which history and fiction overlap, since they are both constructed narratives. Pilkington emphasizes her aunt's and mother's illiteracy. They do not have numeracy skills: "Number, dates, in fact, mathematics of any kind, have little or no relevance in our traditional Aboriginal society" (xii). Time is marked by social, cultural and ceremonial events. But in Pilkington's writing, all the historical events are dated. There are also many other factors to consider when Pilkington transcribes Aboriginal tales she heard from her aunt and mother into a text intelligible to all readers. On the other hand, Pilkington provides a photocopy of a telegram sent to the Chief Protector of Aborigines in Perth. There is an inherent competition between them for "truth value," and there is an unresolved tension in their use of a similar, narrative form.

Whereas Shields recruits imagined witnesses to tell Daisy's birth and life after death in *The Stone Diaries*, Pilkington relies on historical witnesses of the three sisters' journey to the settlement: "The girls from the remote outback of Western Australia sat nervously as the tea and scones were served. They had never shared a meal with a white woman before so they waited until Mrs. McKay coxed them to join in" (59). On their way home from escaping the settlement, they were also witnessed by little Susan's mother, Mrs. Flanagan who "had received a phone call from Superintendent Neal on Tuesday afternoon asking her to watch out for three absconders and to report to him if she saw them" (98). Pilkington devises probable dialogues between the three girls and Mrs. Flanagan.

While in *Swann* and *The Stone Dairies*, Shields invents multiple selves for each individual self, Pilkington portrays a very similar communal self shared by the three sisters. No matter whether in Pilkington's narrative or the historical and official documents, Molly, Daisy, and Grace all share a communal self—they are invariably identified as the three girls. For Pilkington, a communal self that is shared by these three girls, especially when they are on the trek home, empowers each individual and also imposes the development

of selfhood beyond the self of an individual. In the British documents, this three-headed communal self always refers to the Other. But in the Aborigine story, the three girls represent a meaningful community.

Where Shields resorts to an imagined film script for communal deconstruction and reconstruction of a dead poet, Pilkington literally produces a cinematic script for a 2002 Australian film directed by Phillip Noyce. The 93-minute film disseminates and reinforces the powerful image of the three Aboriginal sisters who resist British colonization. In this anti-colonization narrative, a communal self proves to be much stronger than an individual self, contrasting sharply with the increasingly problematic self of mainstream.

Through comparative studies of Carol Shields's and indigenous women writers' life writing, my students, especially Aboriginal women students, can better understand their selfhood formation to find their place in the world, and in the end, learn to present themselves in life writing.

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Star Trek Into Drone Wars

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Star Trek Into Darkness could also be called *Star Trek Into Drone Wars*, because it follows a long *Trek* tradition of transmuting history into science fiction.[1] For instance, during the first season of the original *Star Trek*, the episode "Balance of Terror" (1966)—whose title is a quote from then-Secretary of Defense Robert McNamara's description of the Cold War—shows a deadly battle in a future cold war in space, paralleling the show's Neutral Zone with the Korean Demilitarized Zone as well as the Iron Curtain.[2] The final, original generation *Star Trek* movie, *The Undiscovered Country* (1991), presents an allegory for the end of the Cold War, with an analogue for Soviet Chairman Gorbachev in the Klingon Chancellor, Gorkon.[3] Various *Star Trek* television shows from 1987 to 2005 continue this convention in *The Next Generation's* "Chain of Command" (1992)

examining torture:[4] *Deep Space Nine* (1993-1999) shows the aftermath of an occupation by the Nazi-like Cardassian military; *Voyager* (1996-2001) features a resistance organization named after the World War II French resistance fighters known as the Maquis; and several episodes of *Enterprise* (2000-2005) function as a parable of 9/11 and its aftermath.[5] And so, when *Star Trek Into Darkness* presented a futuristic version of America's drone strikes in the Middle East, some *Star Trek* fans felt they were on familiar ground, even in deep space. The movie was a hit, grossing $467 million worldwide,[6] while also generating buzz for its story about using stealth torpedoes to target a future terrorist. *Star Trek Into Darkness,* on one level, is a critique of aspects of American foreign policy stretching back to the 1960s, but it is also so violent and contradictory that some of its ostensible message is undermined.

1. *Star Trek Into Darkness,* J.J. Abrams, director, written by Robert Orci, Alex Kurtzman, Damon Lindelof, Paramount, 2013. See Nancy R. Reagin, Editor, *Star Trek and History*, Wiley, 2013.
2. *Star Trek*, "Balance of Terror," directed by Vincent McEveety, written by Paul Schneider, Paramount, 1966. Robert McNamara used the phrase in an interview with Joseph Alsop, "McNamara Thinks about the Unthinkable," *Saturday Evening Post*, 1 December 1962, 18.
3. *Star Trek VI: The Undiscovered Country*, directed by Nicholas Meyer, written by Nicholas Meyer and Denny Martin Flinn, Paramount, 1991. See Rick Worland, "From the New Frontier to the Final Frontier: *Star Trek* from Kennedy to Gorbachev," *Film & History*, February 1994, 30.

4. *Chain of Command,* part I, Robert Scheerer, director, written by Ronald D. Moore and Frank Abatemarco, *Chain of Command*, part II, Les Landau, director, written by Frank Abatemarco. In this two-part episode, Captain Picard is tortured by Cardassian Gul Madred (David Warner) in an attempt to physically and psychologically break him. Madred shows Picard four lights, but tells him that there are five, and demands repeatedly for Picard to agree with him while torturing him. In the supplemental material for *Chain of Command* for its blu-ray release, it is mentioned that this is based on the torture process used in Soviet Gulags in the 1930s. The documentary also reveals that Amnesty International, which has monitored and protested torture in various countries for decades, was consulted during the making of this episode. After the abuses at Abu Ghraib came to light in 2003, "Chain of Command" retrospectively took on meaning in the American context as well. See also Larry Nemecek, *The Star Trek: The Next Generation Companion*, Revised Edition, Pocket Books: 2003.
5. Terry J. Erdmann with Paula M. Block, *Star Trek: Deep Space Nine Companion*, Pocket Books: 2000; Paul Ruditis, *Star Trek: Voyager Companion*, Pocket Books, 2003. See also Amy Carney, "Nazis, Cardassians, and Other Villains in the Final Frontier," *Star Trek and History*, Wiley, 2013. 307-322. J.M. Dillard and Susan S*ackett, Star Trek, Where No One Has Gone Before: A History in Pictures*, Pocket Books, 1996, 219, briefly discusses the Maquis. Scott Collura, "Remembering *Star Trek Enterprise* with Scott Bakula," IGN, 26 March 2013. As Scott Bakula (Captain Archer) said of the third season and its 9/11 parallels: "Well, I think we were all so consumed by that event, and it wasn't something that happened to somebody else on our planet, it happened here. You know, Vietnam happened on another continent. So it became something in the writers room that they felt they couldn't ignore, and it kept coming through in how they were feeling, and that's natural. That's how writers write. They're affected by their lives and their world and what they're feeling….I was thrilled with it." Accessed July 19, 2015, http://www.ign.com/articles/2013/03/26/remembering-star-trek-enterprise-with-scott-bakula. For more information on the Xindi arc of *Star Trek: Enterprise*, see the Xindi entry at Memory Alpha Wikia. Retrieved July 24, 2015, http://en.memory-alpha.wikia.com/wiki/Xindi.
6. *Star Trek Into Darkness,* Box Office Mojo: http://www.boxofficemojo.com/movies/?id=startrek12.htm. Accessed July 19, 2015.

Like much of *Star Trek*, *Into Darkness* is at some times progressive, and at other times decidedly less so, in its take on history. The film's story is launched by a genetically-engineered terrorist known as Khan Noonien Singh. Khan's ethnic identity and motivations are additional examples of *Star Trek*'s ambivalent and sometimes confused politics. Khan—or should we say "Khaaan!"—was played in the original series (TOS), and in the 1982 movie *The Wrath of Khan,* by Mexican-American actor Ricardo Montalbán, even though the character was supposed to be a Sikh from India.[7] Khan was one of group of "supermen" who briefly seized power during the "Eugenics Wars," and then escaped Earth on a spaceship in suspended animation with his genetically-enhanced crew.[8] In the 1967 episode "Space Seed" that introduced the character, Montalbán is seen with heavy make-up that attempts to simulate a Sikh skin tone.[9]

Engineer Montgomery "Scotty" Scott (James Doohan), says he's "always held a sneaking admiration for" Khan, because in a time of chaos on Earth "there were no massacres under his rule."[10] Dr. Leonard "Bones" McCoy (DeForest Kelley) adds that there were "No wars until he was attacked." James T. Kirk (William Shatner) agrees, saying that "He was the best of the tyrants, and the most dangerous. They were supermen in a sense. Stronger, braver, certainly more ambitious, more daring." Mr. Spock (Leonard Nimoy) protests their "romanticism about a ruthless dictator," and is proved right when shortly afterward Khan violently commandeers the *Enterpris*e for a short time. But it is

clear that there are a few positive elements mixed in with Khan's cruelty and thirst for power. Dispensing with continuity to a significant degree, the 1982 movie about Khan's wrath did without the dark make-up, and also without Khan's expressed desire to "unify humanity" in order to achieve extraordinary "accomplishments" under his dictatorial rule.[11] About Khan's monomaniacal revenge against Kirk for stranding him and his crew on a "dead planet,[12] *The Wrath of Khan* drains nuance from Khan's motivations at the same time that it avoids dark pigment for his skin. Khan's reboot in *Star Trek Into Darkness* is played by acclaimed white actor Benedict Cumberbatch, who adds to the Hollywood cliché that much of the evil in the universe is hatched from the twisted minds of the graduates of England's finest universities.[13] When *Into Darkness* was released some criticized the casting for "whitewashing" this iconic character, although in a sense, as mentioned, that had already happened.[14] Addressing why an Indian actor had not been considered for the role, the movie's co-screenwriter and co-producer Bob Orci said, "it became uncomfortable to me to support demonizing anyone of color, particularly anyone of Middle Eastern descent or anyone evoking that."[15] Orci's understanding of geography and ethnicity seem vague, as does his understanding of some parts of *Trek* history. In any case, there were certainly many Indian actors who might have brought their own

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7. *Star Trek II: The Wrath of Khan*, Nicholas Meyer, director, Harve Bennet and Jack B. Sowards, writers, Paramount, 1982.
8. A subsequent novel series explains the history of Khan. See Greg Cox, *Star Trek: The Eugenics Wars*, 2 volumes, New York: Pocket Books, 2001, 2002.
9. "Space Seed," *Star Trek*, "Space Seed," Marc Daniels, director, written by Gene L. Coon and Carey Wilber, Desilu, 1967.
10. "Space Seed," 31:00. The quotes from McCoy and Kirk are from this part of the episode as well.

11. "Space Seed," 25:40.
12. *Wrath of Khan*, 1:10:50
13. See Barry Norman, "Why does Hollywood ALWAYS cast English actors as Villains," 20 May 2010. *Daily Mail*. http://www.dailymail.co.uk/tvshowbiz/article-1279809/BARRY-NORMAN-Why-does-Hollywood-ALWAYS-cast-English-actors-villains.html. "Helen Mirren sounded off about this in Los Angeles the other day. 'I think it's rather unfortunate,' she said, 'that the villain in every movie is always British. We're such an easy target that they can comfortably make the Brits the villains.'"
14. See Hanna White, "The Race of Khan: Whitewashing in the New Star Trek Film," May 21, 2013. http://bitchmagazine.org/post/the-race-of-khan-in-the-new-star-trek-into-darkness-movie-0. See also Erik Goldman, "George Takei on his YouTube Series, Takei's Take, His Thoughts on Trolling and J.J. Abrams' Star Trek Films,"
15. Bob Orci quoted in Trekmovie.com, 20 May 2013. Retrieved from: https://en.wikipedia.org/wiki/Star_Trek_Into_Darkness#Critical_reception.

interpretation to the character, including the biggest male star in Bollywood, Shahrukh Khan. Shahrukh Khan might not have been interested in the role, but the fact that no Indian actors were even considered demonstrates that in an attempt to avoid controversy, *Into Darkness* weakened one of *Star Trek*'s key strengths: its ethnic diversity.

At any rate, in the movie Khan masterminds two devastating terrorist attacks on Starfleet, including one on Starfleet's top-secret CIA or NSA-like organization known as "Section 31," one of whose fronts is the archive of a library.[16] In response, the head of Starfleet Command, Admiral Alexander Marcus (Peter Weller), orders Captain Kirk (Chris Pine) to kill Khan by launching a strike with 72 stealth photon torpedoes onto his distant hideout on the Klingon homeworld of Kronos. Launching 72 torpedoes to kill one person is a classic example of what the U.S. military called during the Cold War "overkill"—destroying a target many times over.[17] During much of the Cold War, for instance, more than a hundred nuclear bombs were targeted at Moscow, as well as on Washington D.C., when one alone would substantially destroy a large city.[18]

When Kirk asks if these torpedoes could start a full-scale war with the Federation's main adversary, Marcus replies that "All-out war with the Klingons is inevitable, Mr. Kirk. [Admiral] Pike"—killed in one of Khan's attacks—"always said you were one of our best and brightest."[19] Here, Marcus is using a phrase with a specific historical meaning,

because *The Best and the Brightest* is the title of a book on the Vietnam War written by Pulitzer-prize winning historian David Halberstam.[20] The book, a bestseller when published in 1972 (even before the war ended), demonstrates in detail how well-educated and intelligent people, like Defense Secretary Robert McNamara and President John F. Kennedy himself, led the United States deeper into the morally questionable and militarily unsuccessful Vietnam War during the 1960s. Although *Star Trek Into Darkness* elided aspect's of Khan's identity, here the screenplay correctly reaches back to the beginnings of the franchise, because the original Kirk was inspired in part by President Kennedy, and JFK's "New Frontier" was a template for *Star Trek*'s "Final Frontier."[21] Since Kirk's hubris is being obliquely paralleled in the movie with Kennedy's, it is worth quoting some passages from *The Best and the Brightest* that explore how arrogance during the Cold War led to some serious misjudgements. Halberstam writes that "A remarkable hubris permeated this entire time," which blinded the United States into "looking at Vietnam through the prism of American experience."[22] Related and equally problematic, Halberstam writes, was the relentless pull of military escalation:

> Dealing with the military, once their foot was in the door, both Kennedy and Johnson would learn, was an awesome thing. The failure of their esti-mates along the way, point by point, meant nothing. It did not follow, as one might expect, that their credibility was diminished and there was now less pressure on them, but the reverse. It meant there would be an inexo-rable pressure for more—more men, more hardware, more targets….[23]

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16. Section 31, which first appeared in *Star Trek: Deep Space Nine*, is an intelligence, defense, and counter-terrorism organization run by Federation officers that is not subject to Starfleet's ethical protocols. At times its operations have some similarities with the most secretive and controversial operations of the CIA and the NSA.
17. See L. Douglas Keeney, *15 Minutes: General Curtis LeMay and the Countdown to Nuclear Annihilation*, St. Martin's, 2012, esp. starting on page 221.
18. In fact, at the height of the Cold War, "the U.S. had more than 30,000 nuclear weapons—400 targeted on Moscow alone." See W.J. Hennigan and Ralph Vartabedian, "Future of Nuclear Arms Control Looks Bleak, Experts Say," *Los Angeles Times*, July 9. 2015.
19. *Star Trek Into Darkness*, 32:30.

20. David Halberstam, *The Best and the Brightest*, New York: Random House, 1972.
21. Worland, "Star Trek: From Kennedy to Gorbachev," 20.
22. Halberstam, *The Best and the Brightest,* 123, 135.
23. Halberstam, *The Best and the Brightest,* 178.

Star Trek began as futuristic Cold War liberalism, which, in this post-9/11 era, has been adapted to have an even sharper militaristic edge. As with Kennedy and the Vietnam War, Kirk, one of Starfleet's best and brightest, risks triggering a military escalation that would be disastrous for the Federation. As Robert McNamara himself wrote, "the best and the brightest" became "an ironically pejorative phrase,"[24] and it is used that way in the screenplay of *Into Darkness*.

In the post-9/11 era, rather than developing parables about nuclear weapons or the Vietnam War, as the original show sometimes did, *Star Trek Into Darkness* delves into the national security and moral issues involving drones. As Admiral Marcus says to Kirk: "As part of our defensive strategy, [Section] 31 developed a new photon torpedo. Long-range and untraceable, it would be invisible to Klingon sensors. I don't want you hurt, but I want you to take him out."[25] This is essentially the rationale that's given by supporters of America's drone strikes. U.S. drones, like the torpedoes in the movie, are long-range and difficult to detect.[26] As a 2013 article in the influential journal *Foreign Affairs* puts it: "The drones have done their job remarkably well: by killing key leaders and denying terrorists sanctuaries….And they have done so at no risk to U.S. Forces."[27] The photo illustrating the article shows pilots in New Mexico using video-game-like controls (that also look somewhat like a bridge station on the Enterprise) to direct drone strikes in the Middle East. But some might think it unlikely that there are historical examples of a top U.S. military commander urging a preemptive attack against an adversary that would almost certainly trigger a devastating all-out war, as Admiral Marcus does in *Star Trek Into Darkness*. But what seems like merely a science fiction scenario is actually based in part on the career of U.S. General Curtis LeMay (1906-1990) and his various doomsday military plans. Peter Weller, who plays Marcus, spoke in an interview about how LeMay influenced his character, as well as the idea of preemptive war in *Star Trek Into Darkness*:

> Marcus is no different than Curtis LeMay, with a conscience. I don't know if people remember Curtis LeMay, but he hid 18 nuclear missiles from John F. Kennedy. He was the guy who wanted to pull the trigger on the Cuban Missile Crisis. If you see *Fog of War*, it was all about 'First strike! First strike!' So these warmongers exist, man, and LeMay personifies that. They were real. They *are* real….Anybody who is critical of this, just watch….and listen to [Robert McNamara] talk about LeMay. Again, LeMay felt first strike was the way to get the upper hand, and that's what Marcus feels.[28]

As Weller indicates, *The Fog of War*, directed by Errol Morris (who won an Academy Award for the film as Best Documentary Feature of 2003), while focused on Robert McNamara, also provides a disturbing account of LeMay.

Overseeing the Strategic Air Command (SAC), LeMay in the 1950s and 1960s at times urged preemptive nuclear war against the Soviet Union, even though it would

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24. Robert McNamara wrote in his own 1995 book, *In Retrospect: The Tragedy and Lessons of Vietnam*: "My associates in the Kennedy and Johnson Administrations were an exceptional group: young, vigorous, intelligent, well-meaning, patriotic servants of the United States. How did this groups—"the best and the brightest," as we eventually came to be known in an ironically pejorative phrase—get it wrong on Vietnam." Robert S. McNamara with Brian VanDeMark, *In Retrospect: The Tragedy and Lessons of Vietnam*, New York: Random House, 1995. xv.
25. *Star Trek Into Darkness*, 32:40.
26. The photon torpedoes in *Star Trek Into Darkness* are in some ways similar to drones, and that's the parallel that was made in media when the movie was released, as well as, of course, the parallel being made in this article. An equally close parallel could be made, however, with Intercontinental Ballistic Missiles (ICBMs).
27. Daniel Byman, "Why Drones Work: The Case for Washington's Weapon of Choice," *Foreign Affairs*, July/Aug 2013.

28. Peter Weller, "Exclusive Interview: STID Co-Star Peter Weller, Part 2, StarTrek.com, 30 May 2013, http://www.startrek.com/article/exclusive-interview-stid-co-star-peter-weller-part-2. Retrieved 20 July 2015.

have meant millions of American deaths after the inevitable Soviet counter-strike.[29] SAC was always on 24-hour alert in case a nuclear war had to be fought, and LeMay had access to and launch codes for a number of nuclear weapons, similar to how Admiral Marcus has his own stockpile of photon torpedoes. Declassified documents show that General LeMay was one of the few military leaders "predelegated" to launch nuclear weapons on his own initiative, without authorization from the President, if an emergency situation arose and communications were cut off.[30] For Admiral Marcus, as for General LeMay, since war is almost inevitable, it is better to go ahead and fight it on their own terms, when the Federation (or the United States) would be more likely to prevail. As Robert McNamara says in *The Fog of War*, "LeMay was focused on only one thing: target destruction."[31] In *Star Trek Into Darkness*, then, the supposedly benevolent Federation, created by Gene Roddenberry as a near-utopia—where greed, disease, and discrimination have mostly been overcome—is shown to have a Machiavellian side similar to some extremist elements in the U.S. military. Or, as the popular YouTube parody "Honest Trailers" puts it, the movie's director, J.J. Abrams, has made the Enterprise bridge into "a heavily-armed Apple Store."

In fact, when it comes to Marcus or LeMay, the wars they advocated are more reckless than what Niccolo Machiavelli advised. In *The Prince*, Machiavelli wrote that "it is much safer to be feared than loved,"[32] and "a Prince, therefore, must not have any

other object nor any other thought...but war."[33] But Machiavelli also wrote, "any harm done...must be of the kind that removes any fear of revenge."[34] Nuclear war at the height of the Cold War, however, meant mutually assured destruction, no matter who started it.[35] And something similar seems likely in case of an all-out war between the Klingons and the Federation in the *Star Trek* universe. In fact, in an episode of *Star Trek: The Next Generation* titled "Yesterday's Enterprise" (1990), an alternate timeline is explored where all-out war has been going on for many years between the Federation and the Klingon Empire, and as Captain Jean-Luc Picard (Patrick Stewart) says: "The war is going very badly for the Federation, far worse than is generally known. Starfleet Command believes that defeat is inevitable."[36] Machiavelli would not have suggested a war that would lead to destruction for a state and its leader. Faced with these military realities, Machiavelli would more likely have said, along with Denzel Washington's character in the late Cold War nuclear submarine movie *Crimson Tide* (1995) that "in the nuclear world," (or, for *Star Trek*, the photon torpedo world) "the true enemy is war itself."[37] (And, tellingly, at a critical moment in *Crimson Tide*, Washington's character, in trying to avoid war, suggests, only half kidding, that he's the "Captain Kirk" of the submarine.)

In *Star Trek Into Darkness*, Kirk at first seems all-too-eager to take out Khan with remotely launched photon torpedoes. Spock (Zachary Quinto), however, who often

29. L. Douglas Keeney, *15 Minutes: General Curtis LeMay and the Countdown to Nuclear Annihilation*, St. Martin's Press, 2011.
30. Keeney, *15 Minutes*, 179-180.
31. Errol Morris, director,   , 34:30.
32. Niccolo Machiavelli and Peter E. Bondanella, *The Portable Machiavelli*. Hammondsworth, Eng.: Penguin Books, 1979, 131.

33. Machiavelli, *Portable Machiavelli*, 124.
34. Machiavelli, *Portable Machiavelli*, 83.
35. Edward Kaplan, *To Kill Nations: American Strategy in the Air-Atomic Age and the Rise of Mutually Assured Destruction*, Cornell University Press, 2015.
36. *Star Trek: The Next Generation*, "Yesterday's Enterprise," David Carson, director, Ira Steven Behr, Richard Manning, Hans Beimler, Ronald D. Moore, Trent Ganino, and Eric Stillwell, writers, 28:20.
37. *Crimson Tide,* Tony Scott, director, Michael Schiffer and Richard P. Henrick, writers,, Buena Vista Pictures, 1995, 24:00. There's a *Star Trek* reference at 122:40, and Denzel Washington's character says, "This is Captain Kirk," at 137:30.

throughout *Star Trek* (as originally played by Leonard Nimoy) acts as a voice of reason and morality, questions Kirk's orders, saying, "There is no Starfleet regulation that condemns a man to die without trial, something you and Admiral Marcus are forgetting."[38] Spock's statement is similar to Amnesty International's 2013 critique of U.S. drone strikes in Pakistan, which reads: "Amnesty International is seriously concerned that these and other strikes have resulted in unlawful killings that may constitute extrajudicial executions or war crimes."[39]

As mentioned earlier, *Star Trek Into Darkness* generated substantial media buzz on the topic of drones, which is fascinating, as Spock might say, because some felt that the media wasn't always giving the topic enough attention.[40] *Slate* titled its article "Star Trek Into Due Process: The Sequel's Message About Drones, Militarization, and Blowback." The article's author, Forrest Wickman, writes, "Though it's set in the year 2259, many of the film's key lines sound lifted right out of today's political discourse. After Khan orchestrates a terrorist bombing…and hides out, Osama-like, in a mountain cave in an uninhabited corner of enemy territory, Admiral Marcus orders….an extrajudicial killing by drone strike."[41] Or, as Amy Davidson writes in *The New Yorker,* in an article titled "Is 'Star Trek Into Darkness' a Drone Allegory?":

> The anti-drone argument that *Star Trek* goes for most is not one having to do with due process or collateral casualties (a random Klingon patrol is wiped out as a result of their landing) but an essentially emotional one: they feel strange. It doesn't seem right, or like a fair, forthright fight…. Is our discomfort telling us that we should inquire more about drones, or are we just Luddites who need to get used to the technology?....Or is Khan—and this is more likely, in the movie's context—who we become, or already are, when we are drawn into war?[42]

These are serious questions for a summer blockbuster to raise. If we are fighting our drone wars even in Hollywood movies—and in 2014, the year after *Into Darkness* was released, the popcorn movies *X-Men:Days of Future Past, Transformers: Age of Extinction,* and *Captain America: The Winter Soldier* all had critical allegories about drones—it suggests that we should be looking more closely at how the United States started fighting drone wars in real life.

The drones that eventually helped inspire the weapons in *Star Trek Into Darkness* and several other movies were to a significant degree the work of engineer Abraham Karem, who has been called "the dronefather."[43] Karem was born in Iraq in 1937, and as a small child disassembled his parents' radio looking for the people who were talking inside the tubes, which is more or less what we might imagine *Star Trek* engineers like Scotty (Simon Pegg in *Into Darkne*s) and *Star Trek: Voyager's* B'Elanna Torres (Roxann Dawson) were doing as kids. Karem's parents moved to the new state of Israel in 1951, and ten years later he graduated from Israel's premiere engineering university, Technion.[44] He worked as an aeronautical engineer for the Israeli Air Force in the late 1960s and

38. *Star Trek Into Darkness*, 33:50.
39   http://www.amnestyusa.org/research/reports/will-i-be-next-us-drone-strikes-in-pakistan. Retrieved 20 July 2015.
40. Tom Barry, "Drones Flying Under the Radar," *Truthout*, April 5th, 2012. Retrieved July 21, 2015, http://www.truth-out.org/news/item/8284-drones-flying-under-the-radar.
41. Forrest Wickman, "Star Trek Into Due Process: The Sequel's Message About Drones, Militarization, and Blowback," *Slate*, May 17, 2013.

42. Amy Davidson, "Is 'Star Trek Into Darkness' a Drone Allegory?," *The New Yorker*, May 20, 2013.
43. "The Dronefather," *The Economist*, December 1st, 2012. See also Richard Whittle, *Predator: The Secret Origins of the Drone Revolution*, New York: Henry Holt, 2014, and Jane Mayer, "The Predator War," *The New Yorker*, October 26, 2009. Retrieved July 22, 2015, http://www.newyorker.com/magazine/2009/10/26/the-predator-war. See also Andrew Cockburn, *Kill Chain: The Rise of the High-Tech Assassins*, Henry Holt, 2015.
44. For the best biographical information on Karem, see Whittle, *Predator*, esp. 7-104.

early 1970s, including during the Yom Kippur War. During that war, Israel needed an unarmed drone to help detect and defeat Soviet-made anti-aircraft missiles, some of which were similar to the ones that shot down Malaysia Airlines Flight 17 over the Ukraine in 2014. Karem was asked to help develop a drone for this purpose, but the war ended before he could complete his work. After the war, Karem resigned from the Israeli Air Force and worked on designs for the next generation of drone, but he had trouble selling the Israeli military on his designs, and decided to move to America for what he saw as a more entrepreneurial culture. In 1977, Karem and his wife bought a house in the Los Angeles area, where in their large garage he worked on a drone design with funding from DARPA, the secretive Defense Advanced Research Projects Agency of the U.S. military. (And 1977, by chance, was the year that the original *Star Wars* was released, becoming the biggest-grossing movie in history up to that time, causing Paramount to revive their 1960s TV series *Star Trek* as a movie series, the second of which was *Star Trek II: The Wrath of Khan*.)

When Karem was working in his garage on the prototype for the drone that would eventually find its way—in torpedo form—into *Star Trek Into Darkness*, that was not the first time the U.S. had used drone technology. Drones actually date from World War II, when the remote-controlled radioplane OQ-2 was developed.[45] The military had 15,000 of them built, and they were used with modest success for surveillance using early television cameras, as well as to drop torpedoes on a few ships. They were not very effective or easy to control, however, and often crashed. Norma Jean, at the age of 18, later known as Marilyn Monroe, was working at an OQ-2 factory, when some pictures were taken of her that launched her career. The drone nickname comes from the droning engine, and because their yellow paint reminded some people of drone bees. Some helicopter drones were used during the Vietnam War, but also with a low level of success.[46]

Abraham Karem worked on his drone throughout the 1980s with a small team of fellow engineers, developing a successful prototype drone called Amber that could stay in the air for two days without refueling. Eventually his designs and technology were sold to military contractor General Atomics in 1990, which hired him to oversee the further development of the now-renamed Predator. The Predator drone was first purchased by the CIA for surveillance over the former Yugoslavia during the Bosnian War of the mid-1990s. At that point the Predator, in spite of its name, was still unarmed. As Karem has said, "I was not the guy who put missiles on the Predator."[47]

One of the first Hellfire missiles was fired off of a Predator not long after 9/11. The target was a tall man in a small group of people in a rural area in Afghanistan. The CIA thought perhaps he was Osama bin Laden, and on the 4th of February, 2002, they launched a Hellfire missile at them, and this small group of civilians was blown up.[48] Since that time over 3500 people in the Middle East have been killed in drone strikes, including more than 210 children.[49] In 2014, part of a wedding party in Yemen was

45. Whittle, *Predator*, 20. See also Ashley Collman, "Marilyn the Riveter: New photos show Norma Jean working at a military factory during the height of World War II," *Daily Mail*, 27 July 2013.

46. Whittle, *Predator*, 17.
47. "The Dronefather," *The Economist*.
48. Tom Parker, "Drones: The Known Knowns," *Amnesty International Human Rights Now Blog*, May 1, 2012. Retrieved July 21, 2015, http://blog.amnestyusa.org/us/drones-the-known-knowns/.
49. "Get the Data: Drone Wars," The Bureau of Investigative Journalism, retrieved, July 21, 2015, https://www.thebureauinvestigates.com/category/projects/drones/drones-graphs/.

hit by a Hellfire, killing at least a dozen people.[50] Drone strikes accelerated massively during President Obama's terms in office. There were only about 50 drone strikes during President Bush's two terms in office, while the number of drone strikes under President Obama is now well over 300.[51] This is because drone production has ramped up at General Atomics and other military contractors, as the Pentagon billions dollars each year on different drone models, including the Predator, the much larger and more powerful Reaper, and as well as the faster and stealthier Avenger.[52] General Atomics states, in one of its advertisements aimed at getting more funding from Congress, that it is "Leading the Situational Awareness Revolution."[53] But it does not seem that General Atomics fully appreciates how its drones are perceived by people on the ground in the Middle East. Even the names like Avenger, Predator, and Reaper—which seemingly stands for Grim Reaper of Death—seem tone-deaf for how they are perceived outside of the US. When, while harvesting vegetables, someone's 68-year old grandmother in Pakistan is blown apart by a Hellfire missile, launched by a Reaper drone, in front of her grandchildren, leading to protests by human rights groups like Amnesty International,[54] the US has not just a public relations problem, but a moral problem, and maybe even a "situational awareness revolution." Even some center-right foreign policy experts have questioned the reliance on military drones as a key tool of American foreign policy, as quotes from an article in *Foreign Affairs,* which was paired with the earlier one supporting drones,

demonstrates. Audrey Cronin writes, in "Why Drones Fail":

> It would be a mistake to embrace killer drones as the centerpiece of U.S. counterterrorism....Drones are killing operatives who aspire to attack the United States…but they are increasing the likelihood of attacks over the long term, by embittering locals and cultivating a desire for vengeance….It is worth noting that the most dramatic recent decapitation of a terrorist organization—the killing of bin Laden—was performed by humans, not drones.[55]

Which finally brings us back to *Star Trek Into Darkness.* When we left Captain Kirk, he was planning to take Khan out with Section 31's photon torpedoes. But Spock continues to object, saying, "Captain, our mission could start a war with the Klingons and it is, by its very definition, immoral."[56] When Chief Engineer Scotty refuses to allow the torpedoes with their secret payload onto the Enterprise, Kirk fires him. When Kirk then tells Chekov (Anton Yelchin) to "Go put on a red shirt" and take over Engineering, there was a moment of knowing laughter in many theaters, for *Star Trek* fans know that crewmembers with red shirts are often about to meet their doom. (Although, in fact, Chekov does survive to the end of the picture.)[57]

Finally, Kirk, after seeming to become almost like Marcus, absorbs the protests of Spock and others, and addresses the whole Enterprise crew, redefining their mission:

> As most of you know, Christopher Pike, former captain of this ship and our friend, is dead. The man who killed him has fled our system and is hid-

50. Christine Hauser, "The Aftermath of Drone Strikes on a Wedding Convoy in Yemen," December 19, 2013, *The New York Times.*
51. Pratap Chatterjee, "Our Drone War Burnout," July 14, 2015, *The New York Times.*
52. Friends Committee on National Legislation, "Understanding Drones," Retrieved July 26, 2015, http://fcnl.org/issues/foreign_policy/understanding_drones/.
53. General Atomics website, retrieved July 26, 2015, http://www.ga.com/
54. Amnesty International, "'Will I Be Next?' US Drone Strikes in Pakistan," Retrieved July 26, 2014, http://www.amnestyusa.org/our-work/issues/security-and-human-rights/drones/will-i-be-next

55. Audrey Kurth Cronin, "Why Drones Fail," *Foreign Affairs*, July/August 2013. Retrieved 22 July 2015, https://www.foreignaffairs.com/articles/somalia/2013-06-11/why-drones-fail.
56. *Star Trek Into Darkness*, 33:35.
57. *Star Trek Into Darkness*, 38:50.

ing on the Klingon homeworld….Tensions between the Federation and the Klingon Empire have been high. Any provocation could lead to an all-out war. I will personally lead a landing party…where we will capture the fugitive…and return him to Earth so he can face judgment for his actions.[58]

Kirk leaves Hikaru Sulu (John Cho), in command of the Enterprise with directions to launch the torpedoes in case he's unsuccessful. Since they are landing on the Klingon homeworld, the linguistic skills as well as the fighting skills of Lieutenant Uhura (Zoë Saldana) become important in the attempt to capture Khan, as they face the feared Klingons, or, as Honest Trailers says they have now become—because of their jewelry in this reboot—"the Blingons."

Khan is captured, but caution should be used in making parallels between Khan and Osama bin Laden, as was done by a few in the U.S. press. Khan, as the movie makes clear, has some compelling motivations for what he is doing, even if it doesn't justify his actions. Specifically, Khan's 72 crew members from the past have been deviously, if rather implausibly (even for *Star Trek*), encased and put in suspended animation inside the 72 photon torpedoes that Admiral Marcus gave to Kirk for Khan's destruction. Khan, although a terrorist, seems as loyal to his crew as Kirk is to the crew of the *Enterprise*, and so has a compelling reason to give himself up so that the torpedoes won't be fired and his crew killed. This is not parallel to the collateral damage that US drones cause, but the movie gets across that the the costs of vengeance are high.

This idea is underlined in a clichéd way when it is revealed that Marcus has had

constructed a secret weapon for his desired all-out war with the Klingons, the *U.S.S. Vengeance*. Ultimately, the combination of Marcus, Section 31, and the *U.S.S. Vengeance* turn out to be more of a threat than the Klingons, and just as much of a threat as Khan. *Star Trek Into Darkness* makes the point that extremist forces within the Federation (or in the United States) can become a danger equal to terrorism. Stopping Marcus, destroying the *Vengeance*, and neutralizing Khan, involves space battles, the leveling of much of downtown San Francisco (as Khan pilots the hijacked *Vengeance* directly at Starfleet headquarters, in an echo of the 9/11 attacks), and then a long and brutal fist-fight between Spock and Khan. In the process, the message in *Star Trek Into Darkness* about using diplomacy and the judicial system instead of weapons of mass destruction is somewhat lost. And the idea of putting Khan on trial to face what Kirk calls "judgement for his actions" is also put on ice—literally. Khan isn't killed, but just put back into suspended animation. Even that, however, might have parallels to the legal limbo of some suspected terrorists in U.S. prison in Cuba.

Still, after both Marcus and Khan have been dealt with, Captain Kirk has time for a final speech to Starfleet, and the people of the Federation, where he sums up, by saying, "There will always be those who mean to do us harm. To stop them, we risk awakening the same evil within ourselves."[59] Or, as President Obama admitted at a press conference in 2014: "We tortured some folks."[60] That was said in the past tense. President Obama didn't mention, however, and has been reluctant to discuss, how he continued to authorize remote-controlled death from the skies by drone. In 2012, an article in *The New York*

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58. *Star Trek Into Darkness*, 40:40.

59. *Star Trek Into Darkness*, 2:01:00.
60. Michael D. Shear, "Obama Expresses Confidence in C.I.A. Director," *The New York Times*, August 1, 2014.

Times revealed that President Obama personally oversaw a "grim debating society" to determine who will be put on America's drone "kill list."[61] The deaths caused, including the innocent collateral deaths, are different from hijacking an aircraft and flying it into a skyscraper. But whether your loved was on the 110th floor of the World Trade Center, or was harvesting vegetables in Pakistan, when death comes from the skies it is horrifying and inhumane. As *Star Trek Into Darkness* and *The New York Times* both warn us, the "Use of Drones for Killings Risks a War Without End."[62]

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61. Joe Becker and Scott Shane, "Secret 'Kill List' Proves a Test of Obama's Principles and Will," *The New York Times*, May 29, 2012.
62. Mark Mazzetti, "Use of Drones for Killings Risks a War Without End, Panel Concludes in Report," *The New York Times*, June 26, 2014. See also Steve Coll, "The Unblinking Stare: The Drone War in Pakistan," *The New Yorker*, November 24, 2014.

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Sue Matheson

How Does Indigenous Knowledge Enhance Alcohol and Substance Abuse Recovery Programs

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Introduction

Canada's Indigenous peoples are reconnecting with their traditional culture in an effort to address and overcome the pain associated with centuries of colonization and marginalization. This paper will examine how alcohol and substance abuse recovery programs are enhanced by utilizing Indigenous knowledge. We discuss Indigenous knowledge, and how urban Indigenous people who utilize the Friendship Centre in Saskatoon, Saskatchewan recover from addictions. This study deals with alcohol and substance abuse recovery programs. We present the perspectives held by these constituents with respect to the notions of Indigenous peoples experience with recovering from addictions. Interview results demonstrate that Indigenous knowledge is significant to addictions recovery.

Context

Mainstream or Western mental health, under whose auspices most addiction recovery professionals in Canada operate, is supported by, and thus put into praxis through, the lens of the medical model wherein alcohol and substance abuse is categorized and pathologized. As such, the medical model has effectively exerted a powerful influence over how addiction has been, and is continuing to be, talked about, practiced, and thus funded, which is a rather blunt way of saying implemented, within most community agencies, institutions and hospitals (Poole, 2007).

Historically, Indigenous worldviews and knowledge systems have been largely ignored in most educational curricula in Western society (Adams, 2002; Hansen & Antsanen, 2016). And what was mentioned about Indigenous culture was written from a Western interpretation or point of view. According to Acoose and Charlton (2014a) the professional literature pertaining to mental health has begun to take Indigenous worldviews and knowledge systems into account, this is a relatively recent accomplishment, and that, "misinformation and stereotyping is still problematic…" (p. 4). Correspondingly, Hankard (2014) questions the legitimacy that traditional medicine is being given. He observes that the bureaucratic structure of Western governmental agencies, defined in part within an application and review process based upon the filling-in and examination of forms, necessitate that Indigenous people, who seek travel assistance through Health Canada's Non-Insured Health Benefits Program, in order to access a traditional healer, must use Western medical terminology. Blackstock (2008) concurs that most addiction recovery programs are indeed heavily favouring Western knowledge, which means that there still remains a corresponding disregard for Indigenous knowledge systems. Such discounting of Indigenous culture and ideas are now recognized by many scholars as a reflection of systemic discrimination and colonization that continues to exploit

Indigenous peoples in the present day (Hansen & Antsanen, 2015; Hankard, 2016; Silver 2013).

At the same time, there is an ever-increasing chorus of descent being heard from within Indigenous, and other ethnic, communities, which in part, demand culturally appropriate services. Mohatt et al (2008) note that culture-based coping strategies are important for Indigenous people. Niccols, Dell, and Clarke (2010) as well as Douglas (2013) note the importance of cultural identity for Indigenous peoples and their health.

Regarding Mainstream Treatment Approaches and Indigenous Peoples

Two Hypotheses

There is no shortage of analytical critique when it comes to the ineffectiveness of Western counselling approaches with Indigenous peoples (Harris, Edlund, & Larson, 2005; Waldram, 1997; Weaver, 2004). When discussion turns to explaining why mental health programs have minimal success meeting the needs of Indigenous peoples, there are generally two hypotheses. The first hypothesis rests upon the understanding that Indigenous peoples have higher rates of mental health challenges and often encounter a scarcity of resources. The battle cry here advocates for increased access to professional service providers. The second hypothesis argues that the problem lies, not so much with the degree of access as it does, with how professionals deliver services in conjunction with how Indigenous peoples perceive their treatment at the hands of professionals.

Speaking to the first hypothesis, Beals et al (2005) note that the prevalence of mental health challenges among Native Americans is significantly higher then it is for those of mainstream society. Baxter et al (2006, p. 918) note that in New Zealand, 50.7% of Māori develop a mental disorder at some point in their life; the most common of which are: anxiety (31.3%), substance abuse (26.5%), and mood disorder (24.3%). Phase 1 of the Canadian First Nations Regional Health Survey (2005, p. 139) identifies rates of alcohol disorders and depression amongst the general Aboriginal adult population to be 27% and 18% respectively.

Unfortunately, funding more mental health programmes, hiring more mental health professions, does not necessarily equate to solving this problem. Why? Because, while the data sheds light upon a problematic reality, it does little to explain aetiology. What the data highlights, at least in part, is a strong inverse relationship between current mental health issues with past and ongoing colonial activities (Douglas, 2013; Kirmayer et al., 2000). Such ongoing colonial activities go a long way toward explaining both the low utilization rate of mental health services by Indigenous peoples and why such services ultimately fail them (Centre for Addiction & Mental Health, 2002); and lends support to the second hypothesis.

Speaking to this point, Duran, Duran, and Yellow Horse Brave Heart (1998) note:

> Researchers and practitioners using [W]estern methodologies fail to realize how incompletely their methods capture the truth of Native American tribal lives and pathology. Western methods infiltrate Native American life worlds as epistemic violence, replacing them with foreign idioms, definitions, and

understandings. (p. 69)

There exists a rub between worldviews – Eurocentric vs. Indigenous – that leaves Indigenous individuals and communities at odds with most mental health services. While there are important distinctions between Indigenous groups, there are also, however, a number of values that appear to be universally accepted within Indigenous worldviews. These values are: respect, humility, holism, and balance; and, when they come into contact with dominant mental health systems, these values are very much at odds with the Eurocentric notion that patients comply with expert opinion (JOGC, 2013, p. S26). As such, Indigenous clients may, and often do, experience mental health services as oppressive as their worldviews are effectively marginalized (Coats et al., 2006) wherein they are encouraged, if not pressured, to adopt a culturally foreign – Eurocentric – worldview through their engagement with the dominant mental health system (Gone, 2004).

What the data shows is that Indigenous populations, which have been subjected to colonization, even if separated by thousands of miles, exhibit problematic mental health issues. Further, delving beneath the statistics reveals supressed, and oppressed, peoples who are at ideological odds with systems put in place to help them. In fact, such analysis reveals that those 'helping' systems may in fact be mechanisms of epistemic violence designed to further colonialism.[1] Canadian research has noted that the devaluation of First Nation collective identity is linked to high rates of depression, substance abuse and suicide (Kirmnyer et al., 2000).

Highlighting Western Limitations

Indigenous conceptualizations of health and treatment go beyond what Western notions typically encompass. The shortcoming of Western health that Indigenous ways of knowing highlight is that mainstream health professionals are typically trained to isolate issues that are characteristically considered to exist within the individual, and then develop interventions to address those limiting issues (Ellis, 2001). This becomes problematic when the individual is moved toward being completely identified with the diagnosed problem (Hodge, 2004). Individuals can become subsumed within the applied label to the degree that they begin to lose their individuality to the label. The individual can steadily cease to be Mr. or Ms. So-and-So on their way to becoming the alcoholic, the drug addict, the schizophrenic, and on and on.

The Insidious Nature of Prejudice

Limitations are additionally supported by the way social capital, which is not a value free process, is assigned within society. McGibbon, Etowa, and McPherson (2008) note how racial difference is used to first generate and then reinforce inequalities. This, in part, helps to explain the process that undergirds a proclivity toward pre-judging based on a stereotype (Merridan-Webster Online, 2012).

One way to unpack this situation, especially where it involves mental health issues, is to undertake analysis using Petty and Cacioppo's (1986) elaboration likelihood

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1. Colonialism has been defined as, "some form of invasion, dispossession and subjugation of a people (LaRocque, nd, ¶ 2). Paul Hackett (2005) describes colonialism in Canada as an "attack on Native culture and lifestyles" (p. S19). The National Collaborating Centre for Aboriginal Health (2013) notes that, "colonialism and [its] resulting economic, social and cultural marginalization has had profound health impacts on Indigenous peoples" (p. 4).

model of persuasion.[2] While simplified somewhat here, the model distinguishes between two routes to persuasion: the central route and the peripheral route. When an individual processes a message through the central route, they understand that they are being presented with a persuasive message and try to interpret its meaning. Peripheral route processing, on the other hand, refers to the unconscious reactions the individual has to a message, which in the end persuades one without them realizing it.

Recently, Petty et al (2002) added the self-validation variable to the elaboration likelihood model in order to explain, using the extent of confidence one has in their own thoughts, how information presented by professionals, and those in positions of power, are taken at face value. As government officials and educated professionals within the mental health industry have told the general population that more treatment is needed to combat addictions, the majority of the citizenry simply go along.

A necessary first step toward overcoming prejudice is to familiarize ourselves with Indigenous ways of knowing. Zayas, Gunaydin and Shoda (2015) note that "[m]ental representations are powerful because they implicitly affect perceptions and expectations…" (p. 157). In getting to know others, in coming to appreciate their worldviews, in seeing their humanity, the other can becomes less threatening. When the other is known, minimally as non-threatening, their way of thinking may become more amenable. We may also be willing to incorporate part of the others worldview within ours.

2. For a discussion on alternate models of persuasion, see: Heuristic-Systematic Model Action: Chaiken, S. (1980). Heuristic versus systematic information processing and the use of source versus message cues in persuasion. *Journal of Personality and Social Psychology, 39,* 752–756. Eagly, A. H., & Chaiken, S. (1975). An attribution analysis of the effect of communicator characteristics on opinion change: The case of communicator attractiveness. *Journal of Personality and Social Psychology, 32,* 136–44. Eagly, A. H., & Chaiken, S. (1993). *The psychology of attitudes.* Fort Worth: Harcourt Brace Jovanovich. and the Theory of Reasoned: Ajzen, I., & Fishbein, M. (1980). *Understanding attitudes and predicting social behavior.* Englewood Cliffs, NJ: Prentice Hall. Fishbein, M., & Ajzen, I. (1975). *Belief, attitude, intention, and behavior.* Reading, MA: Addison-Wesley.

Respecting Indigenous Ways of Knowing

Willie Ermine (1995) explains how knowledge has developed over time.

> Those people who seek knowledge on the physical plane objectively find their answers through exploration of the outer space, solely on the corporeal level. Those who seek to understand the reality of existence and harmony with the environment by turning inward have a different, incorporeal knowledge paradigm that might e termed Aboriginal epistemology. (p. 103)

Western cultures have developed their ways of knowing primarily through scientific experimentation on all that is observable, believing that what is seen, microscopically to telescopically, represents all that exists. Indigenous peoples also practice close observations of Creation to learn about the places where they live and how to survive in them. Included in this approach, however, is the mystery of all that cannot be seen, the "incorporeal" and the "metaphysical," all that transcends physical, tangible space. Indigenous peoples acknowledge that "turning inward" reveals a great deal about the cosmos and the multidimensionality of Creation. Ermine (1995) explains:

> The plants and animals were a vital nexus in comprehending the sophisticated directional maps into the metaphysical. Only by understanding the physical world can we understand the intricacies of the inner space. Conversely, it is only through journeys into the metaphysical that we can fully understand the natural world. (p. 107)

Moving toward a holistic understanding of Indigenous culture, at its essence, its knowledge may be described as the entirety of living in relationship with the land (i.e., with Creation), which may be thought of as having two balancing facets. On the one side, Indigenous knowledge is a set of tangible skills and knowledge of how to actually live on the land. This is the knowledge of place for the care of one's physical self, providing the essentials of life. The literature has labeled this Traditional Ecological Knowledge (TEK), which has become relevant in the contemporary arena of environmental resource planning and management (Berkes, 2008; Ellen et al, 2000; Folke, 2004; Huntington, 2000; McGregor, 2004a, 2004b, 20009).

Intertwined with this knowledge of place is knowledge of caring for spirit, knowing one's place within Creation. This involves reciprocity inherent in relationships, how to care for all our relatives and ourselves (Acoose, 2016).

We Are All Part of One Circle

We are all part of creation and, therefore, part of one circle. Graphically, may Indigenous peoples of North America have represented this concept via the Medicine Wheel, also often referred to as the Four Directions or Sacred Hoop. In addition to each segment being represented by a different direction (East, South, West, North), and distinctive colour (black, red, yellow, white), each may also represent:

- Stages of life (birth, youth, adult, death),
- Seasons of the year (spring, summer, winter, fall),
- Aspects of life (spiritual, emotional, intellectual, physical),
- Elements of nature (fire, air, water, earth),
- Animals (eagle, bear, wolf, buffalo),
- Ceremonial plants (tobacco, sweet grass, sage, cedar) (National Library of Medicine, n/d).

Importantly, each part of the Circle symbolize dimensions of health and the cycles of life, each part reveals the four gifts upon which our very lives depend. As such, the Circle is a way to map our lives; where we have come from (where things might have gone wrong or right), where we are, and where we are going (Acoose, 2016).

All Our Relations

Fixico (2003) states that "Indian thinking is inquiry into relationships and community, and it reminds us that community extends beyond human relationships" (p. 7). Relationships solely focused on human interactions are devoid of the complexity of relationships that converge to inform a way to think about the world that includes a multi-logical theoretical perspective. Multi-logical thought suggests that knowledge is highly subjective and fluid. Cajete (1994) described an Indigenous education as a process of tracking, "[l]earning how to blend the mythological, aesthetic, intuitive, and visual perspectives of nature with the scientific, rational, and verbal perspectives..." (p.123).

Our understanding of well-being must include relationships that are tied to the beginning of time, extending beyond human actions and interaction. Indigenous ways are largely based on relationships established with each other as well as those of the surrounding environments. Indigenous ways of knowing is really about conscious and

mindful living. Concepts such as balance, holism, and interconnectedness are regarded as keys for healthy living among Indigenous communities around the world (Australia, 2004; Bird, 1993; Casken, 2001; Durie, 1994). Indigenous ways of knowing recognize that individual health is shaped by features of the larger social context, including family, community, nature and Creator. An individual must therefore consider the results of their actions and behaviours within the greater scope of life and being (Casken, 2001), and, at the same time, must recognize that ones' health and well-being is dependent upon the wellness of everything surrounding them (Durie, 1994).

As We Go Forward

As we move on to examine Indigenous conceptualization of health and treatment approaches, we must tie Cajete's understanding of the centrality of one's well-being as tied to their "harmonious relation with nature" with Dumont's "total way of seeing the world". Not to do so would be to disrespect Indigenous Knowledge Systems. Being tied to the land is more than simple geography, time is not simply a linear progression, and the spiritual cannot be separated from the everyday.

Indigenous Conceptualization of Addiction and Treatment Approaches

Indigenous peoples recognize that Western approaches to mental health tend to invalidate their worldviews, experiences and needs. This recognition is predicated upon understanding the history of the systemic abuse and violent oppression of Indigenous people at the hands of an inherently racist/colonialist state (Blackstock, 2009; Chrisjohn & Young, 2006; Fournier & Crey, 1999; Jeffery, 2009. Arguably, this is still very much

an issue taking into consideration that former Prime Minister Stephen Harper asserted to the develop world, while attending the September 2009 G-20 Summit in Pittsburgh, PA that, "we [in Canada] have no history of colonialism… (Ljunggern, 2009, ¶ 11).

"Aboriginal peoples want to exercise their own judgment and understanding about what makes people healthy and use their own skills in solving health and social problems" (INAC-GS, p. 11). This worldview is, unfortunately, often at odds with the Eurocentric notion that "everyone should be treated the same and should assimilate" (Ward & Bouvier, 2001, p. 26), and, thus, that patients comply with expert opinion (JOGC, 2013, p. S26). This goes some distance toward explaining why approximately half of Indigenous people drop out of mainstream mental health programs after their first session (Sue & Sue, 1990). Wing and Crow (1995) identify the fact that many Indigenous people find admitting they have a problem with alcohol or drug abuse to be shameful and embarrassing. Furthermore, many are, due to colonialism, cautious, even reluctant, to talk with therapists. For these two reasons, Indigenous people may find mainstream approaches, especially those based upon 90-days of treatment, unaccommodating.

Indigenous Conceptualization of Substance Abuse

Aboriginal people tend to view substance abuse and its treatment on both physical and experiential plains. Thus, in order to appreciate and incorporate Aboriginal traditions within any given treatment approach, service providers must have an understanding of the metaphysical. Duran (1995) notes:

Traditional Native people have a way to describe alcohol and the conceptu-

alization of alcohol that differs from non-Natives. Alcohol is perceived as a spiritual identity that has been destructive of Native American Ways of life. The alcohol "spirits" continually wage war within the spiritual arena and it is in the spiritual arena that the struggle continues. (p. 139)

As discussed, traditional cultural values provide Aboriginal people with teachings on how to attain and maintain connection with Creation, which encompasses family, community, culture, and both the natural and spiritual worlds. In fact, many of the mental health issues that Aboriginal people experience are being addressed with the introduction/re-introduction to their traditional culture (Gray & Rose, 2012; Hall et al, 2015). The disconnection here refers, but is not limited to, deliberate strategies by various churches along with the government of Canada to assimilate Aboriginal people into Euro-Western culture. Many people find the substance abuse to be the end result of attempting to deal with intolerable situations. As Gabor Maté (2008) states, "[a] hurt is at the centre of all addictive behaviours" (p. 36). Cultural breakdown has been linked to alcohol abuse with Aboriginal people (Duran & Duran, 1995, York, 1990). Adelson (2005) referring to the Aboriginal Peoples Survey, notes that alcohol abuse was listed as the number two social problem; unemployment was first (p. S45).

Many Aboriginal elders, healers and academics have expressed the belief that re-connection to traditional culture, community and spirituality is healing for Aboriginal people (Acoose, 2016, Hall et al, 2015; Michell, 2015). Such logic is undergirded by the belief that there is a disconnection from sources of meaning and support that make Aboriginal people whole. Aboriginal men who have lost their way are often referred to as Lost Warriors (Thatcher, 2004). Interestingly, logotherapy (Frankl, 1962), a Western school of psychotherapy, approximates this way of thinking; and, as such, offers one possibly amenable way to approach working with Aboriginal people. As an existential-humanistic approach, logotherapy is based upon the understanding that people are motivated to find meaning within their lives. And, a meaningful life can be found within a connection to spirituality, relationships and contributing to one's community. Importantly, a collectively oriented culture, such as Aboriginal cultures, are more likely to provide sources of meaning to its member through family, community, and cultural values than is an individually oriented culture such as the dominant culture of North America.

Unfortunately, many people who have lost their way – lost warriors if you will – come to exhibit existential anxiety. Existential anxiety can cause people to feel sad and hopeless, and people in such places can turn to alcohol and drugs to achieve an artificial state of happiness, or envelope themselves in a fog of oblivious disconnection and unfeelingness. Wing and Crow (1995) found that traditional Aboriginal people believe that alcoholism is caused by a lack of spirituality. Hammerschlag (1993) writes about the effects of disconnection from spirit, culture and creation in his book, Theft of the Spirit. Aboriginal peoples who fall under the umbrella of Western society are perhaps more aware of the effects of disconnection to cultural values because their loss has been the result of transparent, relatively recent, and purposeful attempts at assimilation, cultural genocide and languicide. The resultant devastating effects of these attempts have revealed to Aboriginal people the strong link between cultural dislocation and sickness. As we all currently live within a neoliberal environment, our Aboriginal brothers and sisters may well be in a position to teach the rest of us needed lessons pertaining to Lost

Warriors; if we can only stop and listen.

Strategies that Work
From an Aboriginal Perspective

Brady (1995) believes that Aboriginal people have a rich heritage of healing strategies in dealing with substance abuse. For Aboriginal people, the solution has to be based upon cultural and spiritual survival (Acoose, 2016; Maracle, 1993). The guiding philosophy for treatment programs for Aboriginal people must be predicated upon the understanding that culture is treatment, and all healing is spiritual (Hall et al, 2015; York, 1990).

Substance abuse programs that have proven successful with Aboriginal clients are those that stress traditional values, spirituality, and activities that enhance self-esteem (Gone, 2011; Green, 2010; Lavallee & Poole, 2009; McCabe, 2007; Nygaard, 2012; Spicer, 2001). Anderson (1992) advocates that First Nations values and approaches could be enhanced by a fusion with mainstream psychological techniques. In her book, A Fire Burns Within, Sharon Acoose (2016) goes to length describing how the pairing of traditional culture, ceremony, Alcoholics Anonymous have come together and turned her life around.

Considerations for Mainstream Mental Health Professionals

McCormick (1997) espouses that non-Indigenous 'healers' who are able to integrate the healing ways of others may create new and effective theory and practice. A word of caution. Duran (2006) warns that counselling Indigenous individuals from a non-Indigenous perspective (read: Western) is a form of continued oppression and colonization as it discounts Indigenous worldviews and possibly the individual being counselled. Duran and Duran (1995) note that, "A postcolonial paradigm would accept knowledge from differing cosmologies as valid in their own right, without their having to adhere to a separate cultural body for legitimacy" (p. 6). As such, mainstream techniques by themselves are of little use without and accurate knowledge of cultural context. Long ago, Blue (1977) reported that Native clients do not utilize for value counselling services that are not adapted to a First Nations helping model. More recently, and within a Canadian context, McCormick's (1996) study found that British Columbia Aboriginals described a successful counselling approach as one that was culturally-based in local tradition, and importantly, included Native rules of behaviour such as respect, non-interference, and input by Elders.

Without a cultural context, it is not possible to develop effective substance abuse prevention, treatment or aftercare strategies. Providing culturally relevant care that incorporates, and honours, Aboriginal worldview and culture is a necessity (Acoose & Charlton, 2014a; 2014b). Before we leave this section, two things must be pointed out. First, Blue's (1977) finds are almost forty years old. Unfortunately, they are not out of date! As recently as 2011, the Society of Indian Psychologists sent a Letter to the American Psychological Association with concerns about the DSM-5. Of importance, one objection is that, "the Gender and Cross-Cultural Issues Study Group had one woman and no Native American members" (¶ 3).

Is Aboriginal Ownership or Co-Ownership Required

The short answer is both. Beauvais and LaBoueff (1985) note that Aboriginal communities can complement the movement toward self-determination by encouraging local initiatives. Hall et al, (2015) utilizing the two-eyed seeing model recently noted the same thing. Furthermore, family involvement has been found essential if interventions are to be successful. Johnson and Johnson (1993) found that Aboriginal substance abusers reported family as the second most effective intervention; only spiritual support was ranked higher. For interventions to work, Aboriginal spirituality, culture, community and ways of knowing must be respected.

Aboriginal people do not live in isolation. Aboriginal cultures impact other cultures, just as other cultures impact Aboriginal cultures. Then there is the simple fact that sole ownership may not be feasible. Aboriginal people are demanding that their cultures and ways of knowing be accepted and honoured. The IdleNoMore! movement is but one example. This movement is about bridge, not wall, building. Aboriginal movements such as IdleNoMore! do not seek to cut ties with the dominant culture, they demand, quite simply, that their ways of knowing and being be respected; it is about inclusion, not exclusion. Furthermore, Aboriginal people live in two worlds and are, to varying degrees, accustomed to traveling back-and-forth between cultures (Acoose & Charlton, 2014a). The Tsawwassen People – of southwestern British Columbia – have gone so far as to codify this understanding within their Declaration of Tsawwassen Identity and Nationhood (Tsawwassen Government, 2009). Finally, Hansen and Antsanan (2015) note that urban Aboriginal people are achieving healing by connecting to their traditional culture within urban settings. To be blunt, as Aboriginal people are, generally, comfortable with at

least the notion of concurrent cultural existence, and by extension are likely adaptable to concurrent traditional/Western treatment protocols, the question really is then, for non-Aboriginal service providers: Are you as well? This is a legitimate question as it has been noted that it is the task of the mental health professional "to improve your awareness, knowledge, and skills about who you are if you are to work with clients different from you" (Ivey, Ivey, & Zalaquett, 2010).

Methodology

The research methodology applies the tools of open-ended interviewing, case study, and narrative. The respondants were urban Aboriginal people who utilize the services of the Friendship Centre in Saskatoon, and they were interviewed to help us understand "how" alcohol and substance abuse recovery programs can be bettered when utilizing Indigenous knowledge. According to Creswell qualitative research is suitable when the major research question asks "how" (1998, 17). To elaborate, urban Indigenous respondants who utilize the services of the Friendship Centre were asked the following open-ended interview questions:

- What are the most important factors that lead to addictions recovery

- What factors lead to addictions recovery?

- What are the barriers to healing from addictions?

- What needs to be done in order to promote addictions recovery?

The questions in the above paragraph imply this study is appropriate for qualitative research. Creswell (1998, 15) recommends that the following criteria are crucial in conducting qualitative research. He notes, that "the researcher builds a complex, holistic picture, analyzes words, reports detailed views of informants, and conducts the study in a natural setting." In this research we use the tools of ethnography, and case study. Creswell states further that qualitative research comprise the following:" i) a systematic procedure for inquiry; ii) access to natural cultural settings; iii) collection of a variety of empirical resources, including: Case study Personal experience Interviews Introspection Observation in cultural context Historical, International and Visual texts "(1998, 15) The methods of case study, personal experience, interviews, and introspection have been put into practice with this study. The respondents were recruited through postings at various community-based agencies that pursued Indigenous people living in Saskatoon who had experience with addictions. The research site is the Friendship Centres, each respondant also utilized the services of Friendship Centres. It is important to note that this study uses the term "Aboriginal" to refer to First Nations, Inuit, and Métis people in Canada.

Common Factors in Respondents Experience

There were common factors that led to healing from addictions in the respondent's lives. Such common factors include the following; having children; having a sense of family support, and having a conscious choice to be sober. At the same time, we observe common factors that led to the development and/or relapse of addictions include the following; death of a family member or loved one; family history of attending Indian

residential schools. As one respondent who had suffered from addictions stated:

> "Yeah, my dad did I think my mom did too (attended residential school), my natural mom. I can see how the residential school, how it affected my granny eh, and then how she raised her kids, then how we were raised" – quote from C-11

This passage illustrates how that the residential schools are an integral part of the respondent's family history. Such alienation from Indigenous knowledge and values decreases the ability to be sober. The residential schools suppressed traditional knowledge, language and culture (Hansen, 2015; Jaine, 1993, RCAP, 1996; Cuthand, 2005).

Presenting the Data

Respondents expressed that addictions recovery is no small task and that having a sense of family and community is crucial to the recovery process. The common factors healing factors expressed by the respondents are such that children, a family, social inclusion to a community, traditional teachings, sweat lodge ceremonies, spirituality and Alcoholics Anonymous play an important role in the healing process. As one respondent states:

> "I like the dances and the cultural gatherings you know the round dances and the little gatherings they have there every now and then that I like and the culture is awesome you know it makes people proud when you hear that drum get that feeling in your chest yeah instilling the pride that's

what's Gotta happen it's gonna happen" – quote from C-11

However, respondents also acknowledged factors that lead to relapse or the development of addictions, which include death of family member or close friend, incarceration, family history of residential schools, friends that use alcohol and drugs, and stress in general. These below passages of stress in respondents' lives demonstrate the nature of those their relapse triggers that had impacted the respondent's lives:

"Me, yeah I didn't I just kept going and plus with my mother dying and that really pushed me over the edge I just gave up on everything after that I guess I don't know some people grieve some way and some people grieve the other way me my grief is in the bottle" quote from C-14

"Yeah many things (made me relapse) broke up with my girlfriend and I moved away from her and my daughter and that made me relapse. What else, I have had 17 friends die of methadone, morphine and heroin overdoses and that would make me relapse too" quote from C-13

Respondents stated the importance of dissociating with friends that drink and use drugs is important to their healing journey. Having children encourages the respondents to be sober, which serves to assist the addictions recovery process.

Consistent with the need for human beings experience social inclusion is the

Friendship centres mandate to provide services to the Indigenous community with its array of programs to help those less fortunate. As an Indigenous female in an urban environment, another respondent describes how the Friendship Centre ability to provide counsellors encourages her recovery.

"having the counsellors available being able to talk with the resource people there and the unity like, coming together of our people I found that there is a lot of separation and jealousy among our community members where they… everybody used to visit with one another and everybody used to support one another, we all worked together and now it seems that everybody is just on their own or out for themselves and the whole Friendship Centre brings that together where it's like bringing the people together again" (Quote from C-15).

Examining the Respondents Narratives

The **respondents** recognized factors that encourage recovery as well as factors that encourage addictions.

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-10: Male 63 years of age. Primary addiction alcohol Used alcohol from age 12-30.	• 33 years sobriety; • Aboriginal Friendship Centre Programs, • community events at the Friendship centre, • counselling, • Alcoholics Anonymous having children, • conscious choice to sober up; • workshops on healing from grief and abuse	• family history of addictions, mother and father's alcoholism, • he is a residential school survivor; • his mother and father also attended Indian residential schools.

Table 1A. Respondent C-10

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-11: Male 39 years of age. Primary addictions tobacco and marijuana, Used from age 6 till the present.	• 22 months tenuous sobriety; • Aboriginal Friendship Centre dances and cultural gatherings; • Alcoholics Anonymous; • Narcotics Anonymous; • Contracted hepatitis C caused him to reduce drug use; • Conscious choice to sober up after waking up sick with a hangover.	• family history of addictions; • his whole family attended Indian residential schools; • grew up in foster homes.

Table 1B. Respondent C-11

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-12: Female 36 years of age. Primary addiction crack cocaine Used for 13 years.	• 2 years tenuous sobriety; • quit drugs when she became pregnant; • family night and suppers at the Friendship Centre; • family supports.	• Family history of attending residential schools

Table 1C. Respondent C-12

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-14: Male 30 years of age. Primary addiction crack cocaine heroine, methadone. Used drugs from age 14.	• 4 months tenuous sobriety; • quit drinking when son was born; • Aboriginal Friendship Centre, • food program; • established friendships with counsellors and recovering addicts at the Friendship Centre. • Healing Circles, • Narcotics Anonymous; • Alcoholics Anonymous.	• Mother and Father were heavy drinkers; • mother attended Indian residential school.

Table 1D. Respondent C-14

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-15 Female 40 years of age. Primary addiction marijuana, Used drugs.	• 2 months sobriety; • Having Children; • Alcoholics Anonymous, • Aboriginal Friendship Centre, programming such as family gatherings, Aboriginal Friendship Centre bringing community together, life skills training course, healing circles, addictions counsellors.	• Mother and Father were heavy drinkers; • Mother and Father were drinkers gave her up; • history of sexual abuse; • neglected by caregivers (grandparents), while growing up; • jealousy among community members.

Table 1E. Respondent C-15

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-16: Male age 44 Primary addiction Alcohol. Used alcohol from age 14; and marijuana from age 16.	• 16 months sobriety; • Having Children; • Alcoholics Anonymous, • Aboriginal Friendship Centre, programming; counsellors, • Conscious choice to sober up	• Raised in an Alcoholic home; • Mother and father were drinkers; • Mother and older siblings attended residential schools.

Table 1F. Respondent C-16

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-17: Male age 47 Primary addiction Alcohol. Used alcohol 15 years; and is using Marijuana to this day.	• 3 years sobriety; • Aboriginal Friendship Centre, alcohol and drug programming at the Friendship Centre; • Alcohol Anonymous; • Narcotics Anonymous; Aboriginal cultural programs and activities; • drumming pow-wows.	• Mother and Father were alcoholics; • death of family members; • entire family attended residential schools.

Table 1G. Respondent C-17

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-18: Male age 52 Primary addiction Alcohol. Used alcohol and marijuana since age 16 years; and continues using Marijuana to this day.	• 9 months sobriety; • Alcohol Anonymous, • healing circles, addictions counsellors and sports programs; • Aboriginal Friendship Centre support programs.	• family history of addictions and alcoholism, • family attended residential schools,

Table 1H. Respondent C-18

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-19: Male age 55 Primary addiction Alcohol. Used alcohol and marijuana since age 11 years; and 6 months sobriety in the 1980's; but continues using alcohol to this day.	• Alcohol Anonymous; • Aboriginal Friendship Centre support programs; • Larson House.	• Mother was a drinker; • mother attended residential schools; • immersed in a culture of friends who are drinkers.

Table 1I. Respondent C-19

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-20: Male age 58 Primary addiction marijuana. Used marijuana since age 32; continues using to this day.	• Conscious choice to be sober; • Still using and very frustrated.	• History of incarceration; • spent 14 years in jail under influence of drugs; • history of being homeless; • frustrated with perceived lack of addictions services at the friendship centre; • Cancelled food program at the Friendship.

Table 1J. Respondent C-20

Respondent	Factors that encourage Healing	Factors that encourage Addictions
C-21: Male age 42 Primary addiction Alcohol for 22 years	• 3 months sobriety; • Aboriginal Friendship Centre programs, such as Alcoholics Anonymous; • feeling welcome at the Aboriginal.	• Parents attended residential schools; • break up with spouse; • friends that drink.

Table 1K. Respondent C-21

Identifying the themes

In Table 2, the healing factors and healing obstruction factors identified by respondants are organized into themes.

Factors that promote healing	Factors that obstruct healing
• Aboriginal Friendship Centre • Belonging to a Community • Alcoholics anonymous	• family history of addictions • mother and father's alcoholism, • Family history of attending residential schools

Table 2. Themes

Themes

The thematic addictions recovery factors identified by the respondents were restoring relationships, a sense of belonging to a community, Alcoholics Anonymous. Indigenous knowledge, which includes cultural teachings and ceremonies, having children, a conscious choice to be sober, and counselling. The thematic addictions recovery barriers are family history of residential schools, family history of alcohol and drug abuse, incarceration, alienation from Indigenous knowledge and culture. The respondents convey that addictions recovery can be achieved through utilizing Indigenous knowledge, traditional teachings that are grounded in the culture and community. Respondents expressed that recovery from addictions is also about restoring relationships that were shattered by addiction and destructive behaviour. The significant addictions recovery barriers arose from alienation of Indigenous knowledge and culture combined with family history of dysfunction and alcoholism.

Conclusion

This paper has stressed the importance of Indigenous knowledge in relation to how urban Indigenous people who utilize the services of the Friendship Centre recover from addictions by utilizing different types of connections, namely, connection to meaning/ ways of knowing, place, time, family, spirituality, and identity. The connection which cannot be emphasized enough is the connection to culture.

Traditional cultural values, ceremonies, and healing techniques have been known to provide substance abusers with the knowledge and skills to attain and maintain a meaningful connection with creation. Reconnecting with traditional cultural values, ceremonies, and healing techniques also translates into connecting with others who share and value those some cultural values, ceremonies, and healing techniques within an accepting, yet accountable demanding, community.

Yet there is more going on than 'just' connection to culture. As Downey and Feldman (1996, p. 1327) note, "[t]he desire to achieve acceptance and to avoid rejection is widely acknowledged to be a central human motive." Research pertaining to apprehensive anticipation of prejudice, by Mendoza-Denton et al (2002), found that both direct and vicarious experiences of exclusion can lead people to anxiously anticipate that they will be similarly treated in new contexts where the possibility of such treatment exists. Responses to perceived rejection have been found to include hostility, dejection, emotional withdrawal and jealousy (Downey & Feldman, 1996). Medical research, utilizing functional magnetic resonance imaging (fMRI) has shown that social rejection results in the activation of similar brain regions to those triggered by physical pain (Eisenberger et al, 2003). Not only is society producing angry, disengaged individuals who are mentally and physically hurting, the deleterious results of our rejection continues to resonate long after each interaction and in a cumulative fashion (Baldwin, 2005). Aboriginal people are finding their place within their culture and that is to be upheld and honored. It is also a process that the rest of humanities lost souls might wish to consider.

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Liberation Struggle in Africa: An Analysis of the Causes, Nature and Patterns of the Struggle for Independence in Africa North of the Saharan

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Introduction

At the dawn of the twentieth century. Africa, with the exception of Liberia and Ethiopia, was under European colonial rule. Colonialism's uneven relations between Africans and their colonial masters opened the door for political subjugation, economic exploitation, and cultural imperialism and culminated in master-servant relationships. Africans also opposed colonialism in the form of nationalist struggle and liberation movement. In Africa north of the Saharan, the region comprising Egypt, Morocco, Tunisia, Algeria and Libya; the people resisted European rule and attained independence in the first and second half of the twentieth century. The struggle for independence by peoples of North Africa against their respective European colonial masters took various forms, from peaceful to violent struggle. It is against this background that the Liberation Struggle in Africa North of the Saharan took place. This paper first discusses liberation struggles in different parts of the world before examining the factor that fuelled the liberation struggle across North Africa and outlining its nature and patterns.

An Examination of Liberation Struggles throughout History

Ancient and modern history is replete with the account of liberation movements or struggles of various kinds in different parts of the world. Liberation struggle does not enjoy universal definition; this is because it manifests in various forms, namely revolt, resistance, armed struggle, revolution and nationalism. These liberation movements can be defined separately, however, one common feature is eevident: they are led by the desire to end foreign domination and oppression. They are characterized by the demand for equality, the attainment of independence from colonialism. They aim to replace a tyrannical government or ruler, . Defining "liberation struggle" is difficult because the term is broad, involving two independent words. "Liberation" is associated with freedom or emancipation from socio-economic and political oppression. "Movement," on the other hand, from a political point of view, entails a united effort by a group of people, nations or associations to achieve their collective goal, beit equality, independence, economic empowerment, to mention but a few. This paper therefore defines liberation movement, as a conscious struggle by a group of people to end all manner of oppression whether it is socio-cultural, economic and political through peaceful or violent means.

Liberation movements are not a recent development. They are as old as man. This is because every individual or community wants to retain the freedom that is a god-

given right. When this freedom is threatened, the oppressed group engages itself in the act of liberation. This may be expressed in the form of revolt, resistance, and ,in some cases, armed struggle. In every continent of the world, from the ancient times to the contemporary era, history has ecorded liberation struggles. In the ancient world examples of liberation movement include revolts by Corsica and Sardinia two territories under Carthage, (Wells, 1961) to end Carthage's rule over them. Others include the Jewish revolt against the Romans in Jerusalem from 132 – 135 A.D and liberation wars by the Germanic tribes against Rome aimed at securing their sovereignty from Rome in the 5th century A.D.

In the period from the sixteenth century onwards, one finds various accounts of liberation movements In North America, (Blum et al., 1966; 54 - 56) the Mayas, the Incas and the Aztec Indians, though defeated, resisted Spanish exploitation and colonialization in the 16th century. On the American continent, British colonies engaged Britain in the American War of Independence to gain their independence in 1776. Across the American continent, slaves revolted against their white masters to demand equality and freedom found in the passage of the American Declaration of Independence that says:

> We hold these truths to be self-evident, that all men are created equal, that they are endowed by their creator with certain unalienable rights that among these are Life, Liberty, and the pursuit of Happiness. (Abbot, 1991; 24)

This statement led them to embark on both peaceful and violent struggles to achieve their goal until slavery was abolished in the United States in 1863 and equality attained

in the twentieth century. Franklin and Moss (2004) reveal how the slaves, in Haiti, in 1791, led by François Dominique Toussaint-Louverture, revolted against their French masters, ending French rule in that country. The Cuban revolution of 1953 – 1959 to oust the unpopular Batista led government proved to be another liberation movement in the Carribean. In Europe, Asia and Africa, liberation movements also sought to attain freedom from internal and external oppression. In Europe, the French Revolution of 1789 liberated the French Third Estate from the bondage of the First and Second Estates. The revolution of the 1840s in France, and in parts of the Habsburg Empire, were aimed at domestic liberation. In 1848, Louis Napoleon Bonaparte, a nephew of the first Napoleon, replaced King Louis Philippe as the King of France (Rich, 1992; 78). The revolutions that took place in the Habsburg Empire in places like Bohemia, Hungary, and Italy were aimed at gaining independence from Austrian hegemony. Although, these revolutions ultimately failed they, sowed the seed for the independence later attained in the second half of the nineteenth century and the first half of the twentieth century. The liberation movements that took place in Asia include the Chinese Revolution that ended in 1949, bringing the Communist Party to power, and the Vietnamese War of Independence against France's rule from 1946 – 1954 (Fairbank et al., 1973).

In Africa, during the second half of the twentieth century South of the Saharan witnessed several nationalist struggles aimed at achieving independence from colonial rule. In some countries, independence was achieved peacefully through negotiation between the colonies and their colonial masters. However, in colonies with white settlers, especially in Southern Africa, the struggle towards independence involved armed

liberation and various organisations. In South Africa, the African National Congress (ANC) led other political organisations which revolted against white minority rule. In Southern African (Garba, 1987), the Zimbabwe African People's Union (ZAPU) and the Zimbabwe African National Union (ZANU) falso ought for the independence of Zimbabwe from racist white minority, until independence was achieved in 1980. North of the Saharan in Africa, people were equally dissatisfied with colonial rule led by the French, British and Italian. Their dissatisfaction and the unwillingness of the colonial authorities to articulate concrete plans that would chart the way for these countries' independence led to liberation struggles within the region.

Factors That Fuelled Liberation Movement In North Africa

By the second decade of the twentieth century, the whole of North Africa was under the control of European colonial masters, namely, the French, the British and the Italian. The British occupied Egypt in 1882, having defeated the Egyptian forces during the Urabi revolt and regained her investment in the Suez Canal (Egie3p0bade, 2005; 95). France had the largest possession of colonies in North Africa, and was the first European country to establish a colony in the region. In 1830, the French made Algeria a protectorate, Tunisia in 1881 and Morocco in 1912 (Ayandele, et al., 1971; 100). Italy (Barbour, 1967) was the last European country to establish a colony in North Africa. In1911, the Italians launched an attack on Tripoli, and in 1914, completed their military occupation of Libya. European rule in North Africa contrasted sharply with the people's eperience of the suzerainty of the Ottoman Sultan. Although, the Ottoman Turks exploited the people like the Europeans, their religion, customs, and traditions

were considered less threatening. The arrival of the Europeans and the establishment of colonial rule in North Africa, in many ways, threatened the core values of the people who lived there, and this fuelled the liberation struggle in the region.

A factor that fuelled the liberation movement in North Africa in the twentieth century was European colonialism's adverse effect on the socio-economic and political lives of the people. North Africa's strategic position for the colonial masters' economic and security needs, necessitated their interest in colonising the region. North Africa became a haven for their nationals seeking economic gains outside their shores. The colonisation of North Africa by European powers was aimed at promoting their national interests and those of their nationals who had settled in large numbers across the region to the detriment of the local peoples, especially in French North Africa. E.A. Ayandele, et al. (1971) affirm this fact, arguing that:

> Indeed, in no part of Africa, the Republic of South Africa excepted, was there to be found such a rapid build-up of settler populations as farmers, industrialists, small retail merchants, middle grade civil servants, teachers and even worker who organised trade unions.

Thus, European settlers in North Africa constituted a large part of the area's total population, before its countries' independence. In Algeria, the European population was 10 percent; in Morocco and Tunisia, it was 6 percent. The European populations of these countries were mostly French citizens. In Libya, Italian nationals constituted 10 percent of the total population. These populations had access to the fertile lands and they possessed large acreages for agricultural production, at the expense of the indgenous

peoples. Moreover, they controlled the public service, occupying the top positions, while the local people, even the educated, were relegated to the bottom cadre of the administrative hierarchy. Native hostility was fuelled by the presence of numerous European settlers who dominated both the colonial administration and the colonial economy and thus seemed to occupy a privileged if not monopolistic position (Ayandele, 1971). For the natiave peoples, the only way out of the predicament that colonialism had brought them was independence.

It was the exploitation of the natural resources of the peoples of North Africa by their colonial authorities that ignited their liberation struggle targeted at ending colonialism. The European colonies of North Africa were endowed with mineral resources, which the colonial masters took advantage and exploited for their benefit. Indeed, the presence of these mineral resources was an excuse for them to prolong colonial rule in the region. France (Hrbek, 1993; 133) was guilty of this in Algeria following the discovery of manganese and iron ore meant for military hardware. The French government exploited these mineral resources freely without conceding any royalties to the people, who owned the resources. The discovery of crude oil and natural gas in Algeria in the 1950s further tightened France's grip on the country, despite persistent resistance against French rule. Because French nationals in France and Algeria regarded Algeria as part of France, the discovery of these mineral resources was said to belong to both France and Algeria. For the first time in its history, France had oil wealth in a considerable quantity on its own territory. For this reason, France was determined, despite the Algerian liberation struggle to hold on to colonial rule.

European colonialism in North Africa also entrenched inequality in the political sphere, denying the peoples of North Africa equal rights with French settlers in their territory. France created a divide and rule tactic to segregate and pit the people against each other. For instance, in Morocco in 1914, the French colonial authorities proclaimed the 'state of siege', which restricted the natives from speaking in public. French settlers had the freedom to move freely from one part of Morocco to another, while the natives require a special pass granted only to those with impeccable political records.

French colonial authorities in Algeria also protected the interests of French settlers. In 1947, the French Assembly passed the Algerian Statute that proclaimed Algeria was:

> [a] Group of departments, enjoying corporate personality, financial autonomy, and special organisation. …All inhabitants of French nationality in the departments of Algeria enjoy, without distinction of origin, race, language, or religion, the rights attached French citizenship, and are subject to the same obligations. (Hrbek, 1993)

Although all these Algerians were to be regarded as French citizens, this statute gave a separate electoral status to those Algerians who retained their personal status under the Koranic law. Two electoral colleges were created, the first consisting of Frenchmen and a relatively small number of assimilated Moslems, and the second comprising the vast majority of the Algerian population (Pickles, 1967; 134). Each college elected an equal number of deputies to the French National Assembly and to the newly created Algerian Assembly. This decision by the colonial authorities in Algeria to create two electoral colleges protected French settlers and Algerians that had been assimilated as French citizens from the vast majority of Algerian Muslims by preventing the majority of

Algerian Muslims from controlling the newly Algerian Assembly. In addition, the French settlers and assimilated Algerians were guaranteed equal representation at the French National Assembly.

Following Italy's occupation of Libya, the Italian Resident Governor Count Volpi granted large concessions of land to wealthy Italians who could developthe resources of the country (Barbour, 1967; 13 – 14). Inequality in the socio-economic sphere also manifested itself in unbalanced and uneven labour conditions, in terms of wages, earned between natives and settlers working in the same position and department. Also, in the industrial cities and towns across the region, settlers occupied decent homes and quarters built by the industrial companies. Thousands of North Africans, who had migrated from the rural areas to the urban centres for jobs .were made to reside in the remote parts of the town, in settlements that were unhealthy and lacking basic social amenities.

Another factor that influenced liberation movement in North Africa was the French colonial policy of assimilation that aimed at replacing the culure of the natives of the French colonial territories with French culture and civilisation. The French were of the view that their law, custom, judiciary practices, language ,and education were superior to those of any other civilisation and that the inhabitants of their colonies would profit more if they accepted them. They forcefully implemented cultural assimiliation across their colonial territories. This policy of assimilation also aimed to create assimilated North Africans who would assist the colonial authorities manage their colonies. For example, the native Berber culture of the Maghrebian states was threatened. Contrary to the expectations of the French colonial authorities, the Berbers renounced the policy of assimilation, and would not sacrifice their culture and history on the altar of western civilisation and become French citizens. The (Barbour, 1967; 146). Leading nationalists in Africa North of the Sharan, through open condemnation and in literature, lampooned the French policy of assimilation and the consequences it would have on successive generations. Tunisian Albert Memmi and Algerian Malek Bennabi (Gordon, 1964; 35) in both attacked the French policy of assimilation. They argued that cultural assimilation could only produce culturally misfit men, without any traditional roots or genuine values. They maintained that:

> The policy had been used to divorce elites from contact with the mass of their compatriots, and they argued that the evolue could only find his identity in rediscovering his roots in the traditional culture that French colonialists had disparaged and repressed.
>
> (1964, 36)

Their and others' opposition to the French colonial policy of assimilation galvanised the people to demand independence from French colonial rule.

The desire of the people to preserve their Islamic religion from adulteration imposed by the French policy of assimilation too fuelled liberation movements in Africa North of the Saharan. Across French North Africa, Islam was threatened by western education and by laws introduced by the colonial authorities that restricted Muslims from carrying out their injunctions. In 1930, (Gellner, 1967; 45) in Morocco, the French colonial authorities passed the '*dahir* degree', which in effect legally separated most Berber areas from the rest of Morocco and underwrote their Islamic heterodox, tribal custom. This

development was interpreted by Moroccan Muslims in the urban centres as amn anti-Islamic "divide and rule" tactic and as an attempt to convert Berbers to Christianity. The implementation of the *dahir* policy by the French in Morocco sparked off protests across Algeria and aroused public opinion. Moreover, the Muslims regarded the colonial authorities and European settlers as infidel whose ways lay in sharp contrast against the teachings and instructions of the Quran. They argued that if the doctrine of Islam must remain purified in their land, then colonialism must give way. This the people pursued with vigour, protecting their religion.

Pattern of Liberation Struggle in Africa North of the Saharan

In Africa, the struggle for independence, especially in countries with large numbers of European settlers was difficult. European settlers who saw these parts of Africa as their home were not willing to relinquish control of these territories to the natives. The examples of South Africa, Namibia, and Zimbabwe in Southern Africa attest to this fact. This is also true in parts of Africa North of the Saharan, where European settlers constituted between 6 and 10 percent of the total population, with the exception of Egypt. The pattern of the liberation movement in North Africa was both peaceful and violent. One of the avenues the peoples of North Africa carried out their liberation struggle was through the activities of Muslim Student Associations. These associations, comprised of students from North Africa studying at home and abroad, demanded equality and independence for their countries from their European colonial masters. Prior to the formation of political parties and other modes of resistance to colonial rule, Muslim

Student Associations led the way. In addition, the Associations produced nationalists who led their countries to independence from colonial rule. Muslim Student Associations emerged in the first half of the twentieth century in different parts of North Africa. In Morocco, by 1927, two Muslim Student Associations emerged in Rabat and at Qarawiyn University in Fes (Ashford, 1967; 107). Both associations later merged under the name, the Moroccan League. The Moroccan League was instrumental in dissuading the French colonial rulers in implementing its *dahir* programmes, passed in 1930 and viewed by many Moroccans as a calculated plot by the French to split the people and degrade their Islamic religion. The Moroccan League mounted strong resistance across the country to resist the implementation of the *dahir*. The other Muslim Student Associations existing in other parts of North Africa all opposed colonialism and European rule in their territories.

The press was also an avenue of nationalist struggle in North Africa. All over the world, the press had served as a veritable tool for disseminating news and information to galvanise the oppressed and colonised. The press played a very important role in the early years of nationalist agitation in North Africa; this was because the nationalists initially embarkedon an intellectual protest against unfavourable policies of the colonial authorities. In North Africa, the nationalists exploited this avenue, creating awareness of the ills of colonialism and the need for people to remain united in dismantling colonialism in their different countries. In Tunisia, (Ayandele, et al., 1971) newspapers, namely the *Voice of Tunisia,* an arm of the Destour Party, and *L'Action Tunisienne,* exposed the ills of colonialism and mobilised Tunisians in the fight to end alien rule. Moroccan nationalists in France, through the support of French nationals, published in France a French review,

Maghreb, edited by Belafrej, one of leading Moroccan nationalists (Ayandele, 1966; 107). Also, a wealthy Arab, Sheikh Arslan, based in Geneva, guarded the publication of *La Arab Natione*, a potent vehicle for liberation struggle in North Africa (1966, 108). This publication was circulated in North Africa and among the nationalists.

The formation of political parties was another avenue for the educated elites of North Africa engaged in the liberation struggle. Political parties played an important part in mobilising the peoples of North Africa against their colonial masters, through strikes and demonstrations and in armed struggles. As well, political parties with different ideologies also rallied and supported Algerian nationalists to win amd sit in their National ASsembly and in the French Parliament. It is imperative to state here that not all political parties in Afrcia North of the Saharan were radical in their approaches toward independence; some were passive. Also, there existed factions within some of these political parties, that arose from irreconcilable differences among party members. Nonetheless, the formation of political parties by the nationalists in North Africa played a crucial role in the struggle for independence in the region. In Algeria ,there existed the Parti Populaire Algeria (P.P.A.) founded in 1937, the Mouvement pour le Triomphe des Libertes Democratiques both founded by Hadj Messali, others are Front of National Liberation (F.N.L.), and the Mouvrement National Algeria (M.N.A.) (Ayandele, 1966; 107). In Tunisia, there existed the Destour Party and the Neo-Destour Party. The Istiqlal (independence) Party dominated political activities in Morocco before independence was achieved (Barbour, 1967).

Finally, armed struggle speedily culminated in the independence of Africa North of

the Saharan from colonial rule. Armed and violent struggle against the colonial authorities was prompted by the failure of the colonial masters to fulfill the promises made to the people with respect to their independence. In Algeria and Egypt, the removal of popular leaders of the people, as in Morocco, resulted in a violent struggle against the colonial authorities. The attempt by Italian colonial authorities to frustrate the independence of the people, as they did in Libya, led to fierce resistance.

The nature and scope of resistance differed in the countries involved. In Egypt, the revolt that culminated in independence from British colonial rule in 1922 was the outcome of the Versailles Treaty. The allied powers in 1919, during the Paris Peace Conference, declared Egypt a British protectorate, contrary to the expectations of the Egyptians, who were demanding full independence. The Egyptians led by Saad Zaghlul, led a nationalist revolt from 1919 until the British granted the Egypt independence in 1922, ending forty years of British occupation of the country (Partner, 1967; 25). The independence of Libya was achieved through resistance to the conflicting interests of Britain, France, Russia and the United States. Prior to the outbreak of the Second World War, Libya had been an Italian colony. After, the war, Italy lost her North Africa possession having fought with Germany, Japan and Italy who were defeated by the Allied Forces. Accordingly, Libya came under British temporary control until the Allied powers decided on the fate of the country. In September of 1945, the Foreign Ministers of the United States, Russia, France and Britain met to discuss the future of Italian colonies (Barbour, 1967). The United States demanded Libya be placed under the United Nations trusteeship. France desired the return of Libya to Italy, Britain opposed the return of

Libya to Italy and that the Sanusi of Cyrenaica, who had resisted the Italians before their occupation of Libya, and who equally fought with the British forces against the Italians during World War II, should never come under Italian rule. Russia, contrary to the expectations of others ,demanded that the trusteeship of Tripolitania for herself. In this first meeting of the foreign ministers, no conclusion was reached, and another date was fixed to resolve the issues of Italian colonies. The next meeting of the Foreign Ministers was held in Paris, in April of 1946. Mr Bevin, the British Foreign Minister favoured the unity and independence of Libya, which these others did not support, France's position remained unchanged, and by June in the same year the British were shifting toward the French. Then, a violent reaction in Tripolitania dissuaded any plans to return Libya to the Italians. These demonstrations set in motion the process that resulted in the independence of Libya by the United Nations in January 1952.

Unlike Egypt's and Libya's examples, liberation struggle in French North Africa witnessed fierce resistance to French rule. From 1954 to 1956, until the French granted Tunisia independence, the territory became ungovernable for the French. Tunisia nationalists, led by Habib Bourguiba of Neo-Destour Party, and other nationalist had explored all available peaceful approaches to attain independence from the French. They had travelled to the United States, Europe, and the Middle East soliciting support to end French rule. The nationalists had criticised French policies unpopular with the people. and demanded freedom from colonialism. In 1951, the nationalists had demanded from Paris a Tunisian Parliament. Ordered not to yield to this demand, the Resident-General was instructed to suppress the nationalists and from January of 1952, leading Tunisia

nationalists, including Habib Bourguiba, were arrested and imprisoned (Candole, 1967; 36). Tunisians responded to these arrests and the incarcerations of their nationalists by embarking on violent agitations, accompanied by terrorist acts. This response culminated in armed bands in the mountains. Then, from 1954, acts of terror spread to the rural areas creating chaos across the country. For the first time in modern Tunisian history, the peasants formed themselves into armed groups, the *fellaghas*, to attack European colonists, to sabotage communications (cutting wires, derailing trains), and to fight smaller French units (Barbour, 1967; 67). Indeed, the surprising response to unpopular French colonial policies paved the way for Tunisia freedom in 1956.

In Morocco, the French feared the growing strength and popularity of the Sulta among his people. Sultan Mohammed V had aroused the anger of the French authority by his refusal to openly denounce the Istiqlal, eliminate all persons of nationalist persuasion from his entourage, and failure to nominate a large number of French candidates for the posts of pasha and caids (Hrbek, 1993). The Sultan also angered the French authorities by refusing to sign decrees that would increase French hold on Morocco and demanding the abolition of the Protectorate Treaty, martial law and the establishment of a parliamentary system of government (Ayandele, et al., 1971). The French dethroned Mohammed V and replaced him with the stooge Sultan named Moulay Arafat, a member of the Filali family in 1953, but they blundered, intiating Moroccan terrorist attacks on the French settlers. On Christmas day of 1953 the first act of terrorism was unleashed on French settlers and resistance to the French grew in size, violence and determination. The symbol of this resistance, spearheaded by nationalists and members of the Istiqlal party was that of the

Sultan over the water (exiled in Madagascar). The second anniversary (Gellner, 1967; 45) of the exile of the Sultan (20 August), witnessed a ferocious and apparently spontaneous uprisings in the countryside, with heavy loss of lives on both sides and threatened French control in the country. The French colonial authority reacted quickly. First they forced Moulay Arafat to resign his position as the Sultan, and then they returned the exiled Sultan Mohammed V in 1955. In the following year, Morocco was granted independence from French rule, ending her experience with colonialism.

The last in this series of liberation struggles was the Algerian Revolution or War of Independence against French rule. Unlike the other French colonial territories in North Africa, Algeria stands out for several reasons. It had the largest French and European settlers in the region, large French business organisations were entrenched in the area, and lastly Algeria was as an extension of France. In 1947, the French colonial authorities made some concessions to Muslim demands via the Algeria Statute, which granted to Muslims the right to vote and be voted for in an election, but, unfortunately, the French colonial government in Algeria was unable to fulfill all the provisions of the Algerian Statute. The failure of the French colonial authorities to honour the Algeria Statute proved to the Algerians that the French were unwilling to lay the foundation for their independence and that their quest for independence could not be attained through peaceful means. By 1954, the Algerians concluded that they had to against the French colonial authorities. The Algerian war against the French was coordinated by the F.L.N. with moral and financial backing from Egypt, Tunisia, Morocco and the Arab League. As well, the Algerian war had an international dimension, because the struggle split the members of the United Nations (UN) (Hrbek, 1993). The socialist countries supported the Algerians and condemned French atrocities in her colony, while France had the support of the West. The Algerian War lasted for eight years and is regarded by many as the bloodiest colonial war in Africa. The F.L.N. (Ayandele, et al., 1971) had over 2000 recruits who engaged in a guerrilla war. They also planted bombs in public places, and raideds isolated colonists' farms and burnt down newly built French schools. The heat of the Algerian resistance to French colonial rule made the French government to increase the number of French soldiers in Algeria to protect and secure its nationals. Prior to the end of the war, the French had close to half a million soldiers in Algeria. In 1958, shortly after he was elected France leader, General Charles de Gaulle announced the 'Constantine Plan' aimed at developing Algeria and making Algerians equal in all respect. This action, however, failed to placate the revolutionaries who were determined to end French rule in their country. The war dragged on until March 1962 when the Evian Protocol, announced a cease-fire and proclaimed that the future of Algeria would be decided by a referendum. Following the referendum of July 1962, 99.7 percent Algerian voted for independence, thereby ending the eight years of bloodshed.

Conclusion

Liberation movements in Africa North of the Saharan in the twentieth century were products f the ills of colonialism. Colonialism not only threatened the socio-cultural and religious lives of the people indigenous to this area, it also exploited the natural resources these populations while relegated them as a second-class citizens in their own countries,

especially in the French colonial territories. Following unsuccessful attempts to explore peaceful dialogues between nationalist and the colonial authorities, the peoples of North Africa were forced to embark on liberation struggles. Violent struggle and demonstrations across the region forced colonial masters in North Africa to begin the process of granting independence to their colonies. The liberation movement in Africa North of the Saharan achieved its goal. Without it, people in Africa North of the Saharan would not have attained independence when they did.

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The Victims

(A Play)

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(A dim light comes on stage gradually, depicting that it is early morning. The setting is a forest. Human bones and skulls litter the ground. There are also dead bodies of soldiers and Boko Haram terrorists on the ground. Two men come on stage cautiously from different direction. They carry stems of broken trees to over themselves to make themselves from being detected. One, who is a pastor is wearing a pair of rumpled trouser and long sleeve shirt, with the upper part of his body bare. The other who is an Imam is wearing a white, long shirt that has turned black from dirt. They are sweating profusely and are in a state of panic.)

Pastor: *(Almost in whisper)* Who are you?

Imam: *(Mistakenly steps on a bone which crack and he quickly removes his leg.)* I am Mallam Issa Usman.

(Pastor walks to a tree nearby and drops the stem he is holding. Imam follows and does the same. They sit under the tree.)

Pastor: I think we are safe here for now by the grace of God.

Imam: What is your name?

Pastor: My name is Pastor Joseph and I am from Chibok.

Imam: Allahu Akbar. You are my brother.

Pastor: All glory, honour and adoration to Jesus.

Imam: I am from Chibok too. *(Begins to cry)* Oh my wife. My son!

Pastor: Do not worry, they will make it.

Imam: Not in this state of destruction. Not when Chibok had been sacked.

Pastor: *(Looking at various directions, being cautious)* The Boko Haram insurgent are indeed wicked.

Imam: They came unannounced in the middle of the night. The *kugugugu* sound of the guns and the *gbum gbum gbum* sound of the bombs made me jump out of the bed. I forgot I had a family to protect. *(In deep thought)*. But I did not see my wife and son when I ran out of the house. They must have fled before me. They did not even notify me of the entry of the Boko Haram boys. I have never embarked on this race I had had tonight, all my life. I do not even know where I grasped the strength with which I ran. It was as if it was the end of the world. Those boys came when every living thing in Chibok was asleep.

Pastor: The thief cometh but to steal, to kill and to destroy! Those terrorist hiding in the façade of religion, I mean Islam, will surely get their judgement in hell fire if they fail to repent.

Imam: But they have already made a hell fire of Chibok. Come to think of the number of lives they have destroyed. A year ago, they went to our girls' secondary school to kidnap all the students there.

Pastor: It is indeed a sad experience. My daughter is one of the girls kidnapped.

Imam: Your daughter?

Pastor: Oh yes. My daughter.

Imam: I am really sorry. At least more than ten of them have been released. They are being released one after the other. What an awkward manner of rescuing the girls. Do not worry, she will come back home safely.

Pastor: Amen! *(Wipes some sweat off his brow)* I almost told Sarah not to go to school that fateful day because she was ill, but I changed my mind. I never knew that was the last time I would set my eyes on my beloved daughter. She was a good girl and well behaved. They were three hundred in number.

Imam: *(Goes closer to him)* But this is puzzling. It is really absurd that the terrorist entered Chibok community unnoticed, especially by the Nigerian military, the police and even the Civil Defence corps, and carted these girls away on routes being guarded by the military.

Pastor: Hmmmmm, I sense foul play here.

Imam: *(Places his jaw on his right palm, in deep thought)* But the military still go out to fight against them. There have been various battles between the insurgents and the military, especially in this forest.

Pastor: It is a mere plan of action. It is a scheme.

Imam: *(Gets up, walks up to him and taps him)* What do you mean? Tell me please.

Pastor: Have you seen the arms the insurgents use?

Imam: *(In thought)* Yes. I saw some them errr. The other time some of them were caught.

Pastor: What were they like?

Imam: Hmmmm. I saw Bazookas, AK 47 rifles, those guns that look like missile, amour tanks, amour cars and so on.

Pastor: You are correct. At least, you have seen our soldiers and their arms. What are their arms like?

Imam: Their guns make me remember those days when my father came hunting in this

forest. Their guns are no more than the ones my father and his friends used in shooting monkeys and antelopes. The vehicles they use are very old as well.

Pastor: Yes you are right. Those are the vehicles the Nigerian government used in fighting the Biafran soldiers in the civil war.

Imam: What?

Pastor: Yes. Those weapons are obsolete.

Imam: But I read in the news that billions of dollars were used in acquiring arms to tackle the terrorists.

Pastor: Yes you are right. Billions of naira was allocated but it was all misappropriated by those in the government and the top military officers.

Imam: Then something must be fishy. But how do these terrorists get funds to achieve their objective?

Pastor: Now you are thinking in the right track. Money is the blood of every project. The terrorists have financiers. Their financiers are those in the government. Our leaders.At first, Boko Haram activities started in a low key. They came in the toga of *(In a guttural voice)* "western education is a sin and it must be refuted", but they started burning churches and killingChristians. Then, we said Boko Haram was anti-Christ. Their aim was to obliterate Christianity from the North, make it a caliphate of Islam, and later, the country as a whole. But we were all shocked when they did not only popularize suicide bombing, they also began to kill Moslems as well. Hundreds of mosques have been bombed in the last four years.

Imam: *(Tearfully)* And thousands of Muslims killed as well.

Pastor: Two years ago, 7th August 2012, three Boko Haram terrorists visited a church errr, yes, Deeper Life Bible Church in Okene, in Kogi state with AK 47 rifles and sent the pastor with nineteen members to heaven. What a deadly romance they had with the innocent worshippers! That evening, how blood flowed in the church like River Niger.

(Moving closer to Imam) It was when they began to unleash terror on Muslims that it became apparent that Boko Haram is a political agenda.

Imam: But what political agenda would amount to taking the lives of thousands of innocent civilians, rendering thousands homeless and indulging in a wanton destruction of properties worth billions of *naira*?

Pastor: Power, my friend. Power. That is all they want. Boko Haram is a mechanism used to discredit the government headed by an indigene from the south, used to pit the people against him, to make them vote against him. The cabals in the north always craved power.

(There are guns shots and artillery bombings from a distance, Pastor and Imam run to the back of the wood to hide as the shooting continues. There is a faint cry. The shooting stops and they peer at the direction of the cry. It is a soldier who is wounded, shot in the right arm. He is in his late twenties. The soldier moves helplessly towards the tree and sits on the under it, breathing heavily and sweating. Pastor emerges suddenly and the soldier sets to run but stops when pastor opens his palms signifying that he is not armed.)

Pastor: I am not an enemy. I am a child of God. *(Going closer to him)* I think you need help.

Soldier: *(Faintly)* Yes I do. I am about to die.

Pastor: *(Nursing the wound as Imam emerges)* You will not die. The Lord is your strength.

Imam: I think the wound needs to be covered first to prevent the loss of more blood.

Soldier: Oh I do not want to die.

(With his teeth, Imam cuts a large piece of cloth from his shirt which he hands to Pastor.)

Pastor: *(Wrapping the cloth around the portion of the right arm that bleeds)* You will get better soon.

Imam: *(Wiping sweat off the soldier's face with the back of his palm)* You will not die, Wallahi!

Soldier: *(lamenting)* My colleagues die out there in their hundreds. I wonder where those vandals, those terrorists get their arms. They shoot non-stop. They never run out of arms.

(There are gunshots and bombings nearby. They stare at one another. The shooting comes closer. A bullet hits the tree. Pastor and Imam bolt while Soldier follows slowly as the guns shots and bombing continue to sound. Black out.)

THE END

Johnny Just Come[1]

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The Pas, Manitoba

The Inter-city Express (ICE) train from Frankfurt came to a final stop at the Leipzig *Hauptbahnhof.* The twin retractable doors parted ways as fresh morning breeze quietly sneaked into the coach on that first day of September. It occurred to Johnny that it was time for him to collect his luggage from the hold. Other passengers who were familiar with the disembarking process had already anticipated the stop. In fact, the more agile and impatient ones among them barely waited for the doors to completely retract before stepping onto the platform.

"*Gleise acht,*" said Johnny softly to himself, rehashing the only phrase that mattered the most to him out of all the unintelligible fast flowing German which streamed out of the onboard public address system. He picked up the lighter of his two luggage, a red backpack. He hanged it on his left shoulder by one of its two straps. The heavier one, a suitcase, he pulled by its handle on the vertical end as he rolled it along on its wheels. For one brief moment, he was concerned that the train might depart with him still on board. He had observed that during the few stops before Leipzig, the train barely waited

two minutes to allow boarding and disembarking passengers enough time to either finish saying their goodbyes or retrieving their luggage. Even though he knew, based on the information on his boarding ticket, that the Frankfurt (am Main)-Leipzig train would terminate at the Leipzig *Hauptbahnhof,* he had no way of telling how long the train would remain in Leipzig before moving on to heavens-know-where.

He was the last person in his coach to disembark. He stepped onto the platform, looked right and then left before deciding to head in the most obvious direction – right. That was also the same direction which other passengers from his train were headed.

As he dragged his suitcase along, Johnny reminded himself that he had just had his first ever train ride even though he was in his early thirties. His country of birth, Nigeria, did not have a reliable train system. The general claim was that train travel was one of the means by which people traveled in the country. However, this was not the reality. The railway industry in Nigeria had been plagued by myriads of problems over the years. The few available engines were too old. The staff of the Nigerian Railway Corporation - NRC as it was called lacked motivation. It was normal for the staff of the NRC to go for months on end without a salary which was usually expected at the end of every month. Johnny had a first-hand knowledge of the lack of remuneration situation with the NRC staff because his elder brother also worked for the corporation. To identify the reason behind the problems bedeviling the NRC, one wouldn't need to look far. The culprit was corruption and sharp practices by officials of the industry. Johnny, like many concerned Nigerians, always wondered why the NRC could not be self-sustaining as a corporation, going by the population of potential travelers readily available in the country.

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1. Having the acronym JJC, Johnny Just Come is a common expression in the Nigeria Pidgin English used to refer to someone who is new in a place. It is equivalent to the expression – "the new kid on the block" used in the standard variety of English.

"It's quite a shame." He shook his head lamely like an elder in his community would do in reaction to a sorrowful situation over which he has no control. "To think that these government officials travel abroad to countries like Germany, and yet they never think of replicating the same thing they see here when they got back home is difficult to imagine."

By this time, he had arrived at the end of the platform. He suddenly found himself standing in the great hall of the Leipzig train station. He remembered reading out of a brochure that the Leipzig *Hauptbahnhof* is one of the largest in Europe with a shopping center situated in the train station. The sight before him was very intimidating. The time on the huge clock in the hall that morning was twenty minutes past ten o'clock. Johnny took his gaze off the clock to re-examine his environment.

"O ga o!" he exclaimed to himself in Yoruba; an expression sometimes used as a verbal signal to indicate a resignation to fate. "Too many white faces again, like at the airport in Frankfurt."

Still standing in the same spot at the end of the platform he turned around to take in the view. There were rows of different types of trains ranging from the bullet-shaped ICEs to the less dignified REs or Regional Express used for shorter distances or low-cost travels. They reminded him of rows of ripe corn stalks in June on his family's farm.

His mind went back to his ride from the airport in Frankfurt. Until today, the concept of two or more parallel tracks in train travel was novel to Johnny. It was something of great interest to him that two trains could travel in opposite directions at high speed. All his life, he had always thought of trains taking turns to travel on a single track,

with each train waiting for the signalman. In Nigeria, there were only obsolete single tracks running across sections of the country. The British colonial masters constructed the ancient tracks during their era. No wonder he never experienced train travel because the industry itself was obsolete. People mainly rely on motor vehicles to go about, hence, the excessive rate of motor vehicle accidents.

The rumbling in his stomach jolted him back to reality. He realized that he was hungry. It had been over fifteen hours since he last ate anything. The previous day at his friend's apartment in Lagos, about two hours before setting out to the airport, he had consumed a heavy bowl of *fufu* and *ogbono* soup, with smoked cat fish and beef. Seyi his friend who like Johnny had never flown in an airplane had advised him to "load up" before leaving for the airport.

"Ore," said Seyi tumbling a morsel of *fufu* in his right palm while fanning himself with a plastic blue hand fan with the other hand. The hand fan was a souvenir which Seyi had received at a friend's wedding. In fact, the names and a mugshot photo of the smiling couple could be seen on both sides of the fan. In the photo, the bride appeared to be sitting on something, most likely a stool, while the groom was standing behind his bride placing his right hand on her left shoulder.

"According to the words of the elders," continued Seyi "a bird is only able to fly on a full stomach." He paused to swallow a morsel. "In order words, don't start a journey on an empty stomach."

He still remembered his friend's advice. "That was a delicious meal." He wondered

how long it would take before he would be privileged again to eat another decent African dish cooked by a good woman like Lere, Seyi's Wife.

Johnny would not have been so hungry if only he had known that his flight ticket which was sent to him all the way from Germany by courier also included his meals during the flight. He thought that it only covered a seat on the plane and nothing more. It is commonly said among the Yoruba people that a swimming fish could die of thirst. A butcher's son could end up eating an impoverished stew because he could not afford meat. Likewise, it can be added, that a brilliant scholar could be bereft of common sense, such as the knowledge that a long haul flight ticket usually includes meals on board. Such is the paradox of life. The consolation for Johnny was that he slept soundly through the entire all-night flight due to physical exhaustion.

He almost missed his flight that evening. According to his itinerary, take off time was at 22:45. He arrived at the check-in counter at the airport at 19:05. The airline attendant at the counter shocked Johnny by informing him that the counter was already closed, checking-in had ended. The airport lobby was rowdy, like a normal day in Dugbe market. He tried to explain to the attendant that according to his itinerary he still had over three hours before take-off. The attendant retorted by saying that checking-in closed at 19:00, advising him to re-book for another day.

Poor Johnny knew that re-booking wasn't an option. Some parts of the arrangements that had been made regarding his trip would be disorganized if he postponed his journey by even one day. He resorted to pleading and begging the attendant as a typical Nigerian would do. His compatriots have a special way of begging their way out of tight situations. They have a penchant for never shutting the door on options so soon. True to character, Johnny was quick to notice the telltale signs that his problem had a solution. Unfortunately, he was too poor to make the only available solution happen. So, he settled for begging and trying to appeal to the attendant's humanity. At this point, the attendant ignored him and gave attention to other travelers such as white foreigners and Nigerians who could "shake body" by parting with a few thousand naira. Johnny kept his place close to the counter as he continued to watch other travelers who arrived later than he did pick up their boarding passes and headed to the security check area. He felt very sorry for himself. However, he encouraged himself by not dwelling in self-pity. He was confident that the right opportunity would come his way. He was very determined to travel that night.

A thick-set well-fed and obviously wealthy traveler later showed up at the counter. "How many of you are traveling, Sir?" The attendant asked the wealthy traveler.

"Six," he answered. He pulled out six green passports out of the belly pocket of his *agbada*. He placed the passports on the counter in front of the attendant.

"No, seven!" Johnny quickly added. At the same time shoving his green passport over the counter to join the original six. He made a quick eye contact with the wealthy man, pleading with his eyes.

Sometimes, the rich, in spite of the society's unsavoury comments about them, allow the poor to take a ride on their back. Johnny hoped and prayed that the wealthy man would speak for him. Sure enough, he got his heart's desire. Amidst the cacophony,

the airline attendant produced a boarding pass that had Johnny's name boldly printed. He thankfully grabbed the pass and made a hurried exit. That was the experience that left him completely exhausted by the time he finally made it to his seat on the plane.

All the money he had on him when he landed in Frankfurt was 105 Euros. That sum didn't come easy for Johnny. He had to withdraw his entire savings from the bank. With the help of Seyi, he was able to locate the city's currency black market in Sabo where unlicensed currency marketers carry out their currency exchange operations.

"We have to be very vigilant here," said Seyi as they both tried to skip some puddles on the wet, unpaved road which ran through Sabo. "Not all black marketers you see here is genuine. Some are here to take advantage of unsuspecting folks by selling to them fake currencies in exchange for their hard-earned naira."

An urchin made a bee line towards them. He didn't seem to care about where he stepped. He had locked his sight on his target and wasn't going to allow anything to slow him down, not even puddles. *"Bros, una good morning!"* Greeted the urchin in Pidgin English, not in a particularly loud voice but just loud enough for his audience of two to hear him over all the noise in the market. He soon joined the two friends and continued pacing along with them. *"I get dollars, pound sterling, and euros. I go give una good rate. My business na original. Make una no go meet fake people."*

Seyi neither stopped in his track nor appeared to have heard the patronizing urchin. Johnny knew that it was best to rely on Seyi since he was the "Lagos boy" who knew the environment very well. No such thing like this existed in Johnny's home city of Ilorin.

"Bros, una don dey pass my shop na! I beg. I go do una fine." The urchin continued in his effort to win the two friends over. *"Make una come try me, I beg."* Having realized that his targets weren't yielding to his entreaties, and judging that they would soon be stepping into another marketer's territory, he made one final spirited effort to persuade Seyi, since he had come to realize that Seyi was the person towards whom he needed to focus all his energies. *"Bros come na; I beg."* He grabbed Seyi by his right wrist. The latter instantly jerked back his arm forcefully in one swift motion.

"Wetin dey worry you?" He scolded the urchin. *"Na by force sey make I do business wit you? I beg leave me jo! I get my customer."* The chastisement and the finality in Seyi's voice warned the urchin that Seyi wasn't going to yield. It was like pouring water on a boulder. He gave up on the two friends and did a quick 180^0 with the hope of finding a lucky break somewhere else.

Again, Johnny's senses were jolted back to the present by hunger. "May be I might try getting something to eat." He noticed that he was standing almost on one end of the hall due to the position of platform eight. None of the businesses on his side of the hall sold food. There was an electronic store with the name SATURN boldly written on the entrance. Next, were the toilets and baths. "Interesting," he thought, "so people can go in there and take a bath?" He tried to make some sense of the information on a banner at the entrance of the toilets and baths. He was able to understand that travelers who intended to use the bath would have to pay 5 Euros. He quickly calculated the equivalence of that in *naira*. At 160 *naira* to a euro, that would make 800 *naira*. "Really! 800 naira just for a shower!"

Right after the toilets and baths, was a hair salon which was of no interest to him. "I am bald anyway." So, there was nothing much to see on this end. He decided to walk to the other end of the gigantic hall. All he wanted was something to eat. Some few meters after passing the flight of stairs that lead down to the two South exit, he found what looked like an eatery. It also had what looked like an array of food in a long glass enclosure. He slowly and deliberately walked past the strange items. He turned around and walked past again in the opposite direction. "I have no idea what to make of this stuff. How will I even make an order when I don't know what I am ordering?"

He walked back to the bank of stairs, feeling hungry, hopeless and helpless. The train station was still busy with travelers, family members, and friends, all going back and forth mindless of the lone black man in a black striped suit standing with a big black suitcase and carrying a red backpack. Right there by the stairs, Johnny suddenly remembered a dream he had had three years earlier in his Boy's Quarter accommodation at the University of Ibadan. He had just completed his Master of Arts study and was awaiting the release of his final results. On that particular night, he dreamt that he had just arrived on a train at a train station. Somehow, he knew in the dream that he was in Germany. Just like in his present reality, he had also arrived hungry in his dream. Again, like in reality, he had seen an array of food which he didn't recognize at the station. The only difference between his dream and his present reality was the absence of rice which although was present in his dream among the host of foods, he hadn't been able to find in reality.

An idea occurred to him. "Aaah! Perhaps, I can make rice part of my reality too!"

There is a sudden resurgence of Hope within his being. He decided to explore the train station further. His quest for rice at the Leipzig *Hauptbahnhof* had begun. He concluded that there was nothing more to see on this level of the train station. He knew that he had to take the stairs down to the lower level or levels since he wasn't certain about how many levels there were. The stairs weren't roller-suitcase friendly, so he had to do the heavy lifting all the way down. He stopped briefly on the first landing just to rest his tired right arm. He finally made it down and discovered that he was standing in a hall facing the two south exit doors that would take him to a busy road which he later came to know as the Willy-Brandt-Platz.

"I am not going out there yet. I have to find rice." To his left was a flower shop, directly facing a gift shop. He did a quick about-face and joined the crowd heading in the direction of more stores that seemed to line up along a huge passage. He was impressed by the lights and colours emanating from the businesses that lined up the passage. They ranged from gift stores, a super market, a pub which he never dared to enter because of the smell of alcohol oozing out of the place. He finally came to the end of the passage and noticed a pair of escalators. One was ferrying its passengers down, while the second seemed to be bringing its passengers up from the bowels of the earth. He carefully stepped on the one going down, fearing that he might fall. It was only his second time of traveling on an escalator. The first time was early that morning at the airport in Frankfurt. His fear of escalators and other forms of conveyors was triggered by an embarrassing experience which he had at the Lagos airport on his way to the boarding gates the previous evening. He had stepped on a travellator while holding firmly to the left railing. That was the error

that caused him the embarrassment. Both his feet were suddenly swept off from under him, going ahead of the rest of his body. He fought to rein in his runaway legs while still holding on to the railing. His effort yielded no immediate result as the legs seemed to be in a hurry to get to the gate without their master. Two fellow travelers had to come to his rescue.

Johnny was half way on his journey down the escalator when he suddenly observed a young couple who appeared to be in their late teens or very early in their twenties locked in a passionate kiss while riding up on the second escalator. Johnny had never seen such a sight. "Just like in Hollywood movies!" he thought. He kept staring at the couple as they passed. His mind was trying hard to accommodate this unholy event taking place right before his eyes. "This can't happen in my part of Africa!" Earlier that year, February to be precise, he had traveled in tow with his girlfriend to Minna, a Sharia-compliant city in Northern Nigeria. After visiting with friends, on the morning of their departure out of Minna, they went to the state-run transport company to board a minibus going to Abuja. When it was time to start boarding, women passengers of all ages including Johnny's girlfriend sat on the first two back rows of the four-rowed mini, while the male folks sat in the first two rows. It was *Haram* for men and women to sit together in public. "Kissing in public would probably be seven times *Haram*! They certainly won't make it through on their journey on the escalator before being pummelled with rocks – death by stoning." He managed to catch himself at the very moment that his escalator reached the end zone. "Watch where you are going, Johnny!"

At the end of the escalator ride, in the basement of the train station, there was another supermarket to his right and a *Reisebüro* to his left. He observed a couple of eateries lining up the corridor. He stopped at one of the eateries to read from the list of a handwritten menu on a blackboard at the entrance. There was no word in the similitude of rice on the list. It suddenly dawned on him that he might have just wasted his time. He checked his wristwatch it read ten minutes past eleven. "I have been roaming about this station for close to one hour." He decided to try and find his way to the Institute, the primary reason he was in Leipzig anyway.

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