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Rachel Klein | Philosophy

Leah Havlicek | Global Studies

Bobby Trice | Sociology/Anthropology

Lyn Howe | Environmental Studies

Molly Howard | English

Anna Keeva | Sociology/Anthropology

Sam Morkal-Williams | Philosophy

Warren Wilson College
Swannanoa, North Carolina
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Auspex: an augur, or diviner, of ancient Rome who watched for omens in the flight of birds

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Editorial: Our Lives in Transposition

Sarah Carraux, Editor-in-Chief

Since the evolution of human sentience, we as a species have created structures and frameworks—systems to understand, navigate, and ultimately control everything from our interpersonal relationships to our social and cultural norms, values, and means of power. These conceptual frameworks have served us well in the promulgation of our myriad cultures, but it takes very little reflection to identify the subversion of those social structures into tools wielded by the few to oppress and maintain power over the many. This last year has provided a staggering number of examples wherein we, the universal “we,” have shored up our culturally normative systems of oppression and marginalization; whether it’s the Me Too and Time’s Up movements standing up against sexual assault, or grappling with the knowledge of immigrant families being separated and turned away at our borders, we have rallied against the deep well of hurt we cause each other in the name of the frameworks that maintain our culture.

But there is a certain beauty to be found in such frameworks, such structures, and that is that ultimately, they can be changed. They are not permanent, but rather, piecemeal, scaffolded, layered. Thus they can be dismantled, rearranged, transposed. To transpose is to change the normal order of something, the form or nature of it, to create a metamorphosis. What better moment in our evolution as a species to bring about a metamorphosis, to put forth our collective energy and effort towards a transposition of all that is broken, to look both backwards and forwards at what we have created thus far and how we want to transpose that onto our future.

Each piece in this volume exemplifies our ability to reconceptualize and transpose what is important from the past onto our collective future.

In an effort to identify and understand the nuances that technology brings to modern social interaction, Rachel Klein takes Aristotle’s theories of friendship and applies them to the contemporary conversation surrounding social media and online friendship. Molly Howard’s analysis of the harmful didactic themes in fairy tales, such as Charles Perrault’s “Bluebeard,” is done by placing centuries-old stories into modern contexts, revealing the harmful nature of their original moral implications. Both of these pieces explore the ways that we

interact with and are influenced by different forms of media, and how those forms evolve and take on fresh meaning when examined through a new lens.

Lyn Howe's piece focuses on the ways in which combining archaeology and ecological modeling software can help determine whether bison herds can be successfully introduced to new ecosystems; she transfers archaeological records of ancient bison sightings onto modern technology in order to determine a future outcome of a declining species, and also discusses the possibility of transposing bison from their native territory of the western United States to the grasslands of the eastern US. Anna Keeva's piece focuses on the concept of motherhood as it is applied to incarcerated women. She explores what parenting looks like and how motherhood is experienced and enacted in this difficult setting. Sam Morkal-Williams' piece on the societal role of the public sphere and public opinion suggests a transposition of our notion of the public sphere onto progressive, feminist philosophical structures, therein creating and understanding more constructive confrontations within its context.

Leah Havlicek and Bobby Trice's pieces both interpolate aspects of education by exploring the reasons and ramifications of internationalization and institutionalization in educational contexts. Leah uses her time spent in Peru to study the transposition of indigenous languages to modern contexts and the consequences of that practice. She argues that the institutionalization of Quechua in schools is problematic for indigenous students as it limits academic opportunity and furthers systems of control. Bobby examines internationalization in the context of higher education, critically analyzing ideologies and discourses used in the promotion of IoHE.

The authors in this volume serve as arbiters of history, conduits for the ever-evolving truths of humankind. If we don't examine our shared histories in their entirety, if we accept only one side of the story of us, we become flat—we sacrifice our dimensionality, and ultimately, our wholeness. These pieces tear down the edifice of half-truths and twisted tales so many of us had to climb and often fall off, and they help raise up the voices and perspectives of the many. It is our hope that these works inspire readers to think critically about the ways in which echoes of the past actively affect our conception of the present. We hope you enjoy this volume of *Auspex* and continue to engage with the concepts explored herein.



brambles in the present moment
by Jesse Raven

Online Friendship: An Aristotelean Examination of Social Media

Abstract:

The current dissidence between virtual and physical worlds is a concept that dominates much of contemporary society and is precisely what makes the argument on friendship, for example, continually intriguing; our culture is advancing exponentially, with technology becoming more pervasive, yet many people question not only the need of a public declaration of a private love, but moreover, the credibility of friendship founded and sustained through online means. Even more, virtual relationships are often seen as significantly weaker partnerships, since their “courting” happens digitally and without physical contact. However, as technology continues to advance and social media websites become more nuanced, online friendships can feel exceptionally “real” and satisfy much of what real-life relationships have historically offered. This paper discusses the intricacies of online friendship, paying particular attention to the ways in which friends formed through virtual means provide necessary emotional support and growth, despite their technological conception. Much of this examination of friendship in general will draw from Aristotle’s Nichomachean Ethics, as it established an integral framework for understanding friendship on a philosophical level. Specifically, however, this research focuses on Aristotle’s distinction between friendships of utility, pleasure, and virtue, where utilitarian and pleasurable friendships are often seen as transient or fleeting relationships when compared to friendships of virtue. Lastly, this paper explores how Aristotle’s theories fit into the contemporary conversation surrounding social media and online friendship, deciding whether virtuous friendships can form and exist on sites like Instagram and Facebook. While the scope of this conversation will narrow in on these two websites in particular, the role of text messaging and FaceTime video in an online friendship is also examined, as these modes of communication are seen as especially transitory and lacking much of what makes a friendship deeply emotional and mutual. Using Aristotelian theory of friendship as reciprocal, as well as social theories surrounding social media, Aristotle’s virtuous friendships can be found to exist on online platforms and contribute to a philosophically and existentially happier life.

Rachel Klein |Philosophy



Rachel Klein is a writer living in Philadelphia, Pennsylvania. Her creative work has been published in small journals and zines, including an essay about memory and grief entitled “Looming, Still.” Rachel graduated from Warren Wilson College with a BA in Creative Writing and Philosophy, where she focused on the intersection of ancient philosophical inquiry with short-form nonfiction and literary journalism. When she is not writing or reading, Rachel can be found working as a chocolatier in America’s oldest running confectionery—most likely eating something sweet.

INTRODUCTION

Several weeks ago while scrolling through Facebook, I clicked on a *New York Times* article, “Are You Really In Love if It’s Not on Instagram?” and read through the blunt, yet humorous prose written by Krista Burton. Although not singular in its conversation about love and social media, I was struck by this article in particular for its harshness. “I don’t understand the point of regularly writing deeply personal declarations of love,” Burton starts, “even if it’s platonic friendship love, for thousands of strangers to see.”¹ The piece catalyzed a myriad of comments, many of which supported Burton’s claim that friendship ought to be private, reciprocal, and deeply emotional. One commenter stated: “Please...come join us in the real, non virtual world: I assure you it’s far more rewarding. I found love [in the real world] twice.”

What makes Burton’s article particularly poignant is that her words are indicative of a culture whose “real world” reality is currently interwoven with technological advances like computers, cell phones, and tablets. Even more, these advances seem to affect all facets of human relationships, including romantic partnerships and platonic friendships, and the boundaries that previously limited intersubjective discourse between persons no longer have the same stronghold. Social media sites like Facebook and Instagram make interactions significantly easier, giving online communication an important place in contemporary life. As Burton succinctly concludes: “Our real lives and online lives are merging; they’re starting to feel indistinguishable.”² This liminality between concrete reality and ambiguous artificiality makes something as universal as friendship harder to define and understand.

This dissidence between virtual and physical worlds is precisely what makes the argument on friendship continually intriguing; our culture is advancing exponentially, with technology becoming more pervasive, yet writers like Krista Burton, and the many people in support of her article, question not only the need of

¹ Krista Burton, “Are You Really Dating if It’s Not on Instagram?” *The New York Times*, Mar. 24, 2018.

² *Ibid.*

a public declaration of a private love, but moreover, the credibility of friendship founded and sustained through online means. It is important to acknowledge that Burton does not mean to condemn the nature of virtual friendships, just the performance of them, particularly on social media platforms like Instagram where users can share images and videos to thousands of mutual followers, turning a private friendship into a public one. Even more, virtual relationships are often seen as significantly weaker partnerships, since their “courting” happens digitally and without physical contact. However, as technology continues to advance and social media websites become more nuanced, online friendships can feel exceptionally “real” and satisfy much of what real-life relationships have historically offered. Why, then, does an online friendship seem to threaten the tradition of friendship, and what is the value, if any, of establishing and maintaining these types of friendships online?

In this paper, I will discuss the intricacies of online friendship, paying particular attention to the ways in which friends formed through virtual means provide necessary emotional support and growth, despite their technological conception. Much of my examination of friendship in general will draw from Aristotle’s *Nicomachean Ethics*, as it established an integral framework for understanding friendship on a philosophical level. I will focus primarily on Aristotle’s distinction between friendships of utility, pleasure, and virtue, where utilitarian and pleasurable friendships are often seen as transient or fleeting relationships when compared to friendships of virtue. By “friendships of virtue,” Aristotle does not simply mean friendships between two noble or virtuous persons, but rather that the close and long-lasting reciprocal bonds of their love for one another stem from their mutual respect for the character of the other, so that the friendship is based on internal characteristics of the person, rather than external factors of pleasure or utility. Through this analysis, I intend to explore how Aristotle’s theories fit into the contemporary conversation surrounding social media and online friendship, deciding whether virtuous friendships can form and exist on sites like Instagram and Facebook. I will examine Aristotle’s notion of a “shared life,” as well as his argument on self-love and reciprocity. While the scope of my

conversation will narrow in on these two websites in particular, I will also examine the role of text messaging and FaceTime video in an online friendship, as these modes of communication are seen as especially transitory and lacking much of what makes a friendship deeply emotional and mutual. However, I will argue that if they are used in conjunction with friendships founded through Instagram and Facebook, then these methods of interaction could strengthen virtual dialogue, particularly since FaceTime enhances face-to-face interaction.

Using Aristotelian theory of friendship as reciprocal, as well as social theories surrounding social media, I will argue that Aristotle's virtuous friendships can exist on online platforms and contribute to a philosophically and existentially happier life. I will argue that this is particularly true for both younger and older people, whose lives are influenced by transitory experiences and emotions. Furthermore, I will argue that virtuous friendships can sustain themselves online; however, these types of friends ought to supplement their online correspondence with physical interaction, thus reinforcing Aristotle's argument that these friends share space together.³ I will focus my argument on Aristotle's notions of a "shared life," reciprocity, and self-love, and how these theories can be applied to online friendship.

First, I will discuss Aristotle's *Ethics* and begin to establish a framework for understanding how an Aristotelean notion of friendship can be taken up in contemporary, online friendships, focusing specifically on his discussion of happiness (*eudaemonia*) and its relationship to friendship. I will then examine the ways in which social media sites like Instagram and Facebook have both constructive and destructive qualities, particularly in how the two can simultaneously alienate and socialize individuals. Following this discussion, I intend to show how my own usage of social media accounts contributes to my overall level of happiness, paying particular attention to whether those friendships provide genuine emotional reciprocity and nourishment, or if their technological

³ Aristotle, *Nicomachean Ethics*, trans. Terence Irwin and Gail Fine (Indianapolis: Hackett Publishing Company, 1996), 268.

parameters inhibit the opportunity for authentic connection. Finally, I will address the objections to this argument, especially those like Krista Burton's, that claim that the performance of online relationships combined with their lack of physical connection foster vapid and transient relationships.

AN ARISTOTELEAN NOTION OF HAPPINESS

This discrepancy over the validity and integrity of online friendships has roots in another, much larger philosophical quandary: the quest for living well. As Aristotle argues in his *Ethics*, friendship ought to promote a happier, more *eudaemonia* life, stating that “every craft and every investigation, and likewise every action and decision, seems to aim at some good; hence the good has been well described as that at which everything aims.”⁴ The final “good” at which everything ultimately aims, Aristotle argues, is happiness. However, happiness as *eudaemonia* involves a much richer notion of the way we understand that term now, as it means living *well*, over the course of a lifetime, with a myriad of contributing factors: economic security, good health, family, intellectual and creative pursuit, civic action, pleasure, and friendship. In addition to things like intellectual inquiry, academic study, and virtuous activity—all aspects of Aristotle’s “good life”—he also discusses the importance of friendship and its integral role in one’s life and in the well-functioning community.⁵ After categorizing the various forms of friendships—that of utility, pleasure, and virtue—he claims that the most enduring and rare type of friendship is one characterized by virtue; individuals who find themselves in this partnership have mutual respect for the other based on who they are intrinsically, not merely on external pleasure or use.⁶ Friendship, then, is an integral part of an overall richer and happier existence—an ultimate *telos*—where this end goal is sought in itself and never because of something else. For Aristotle, virtuous friendships are a part of this *eudaemonia* life,

⁴ Ibid., 196.

⁵ Ibid.

⁶ Ibid., 197.

since those friendships stem from a deeply recognized self-respect and understanding that extends beyond other relationships that can influence one's life. In other words, a person befriends another for both their own goodness and their friend's goodness, since a true friend is "another self"—they wish all good things for their friend as they do for themselves. A friendship of virtue, then, is rooted in self-love and love for another.

However, it is important to understand Aristotle's distinction between long-term and short-term happiness as it relates to friendship, as Aristotle clearly argues that friendships of pleasure and of utility tend to be more short-lived, but friendships of virtue are lasting, and a part of long-term happiness. In Book One of his *Ethics*, Aristotle grapples with the varying definitions of happiness, writing that "many think it is something obvious and evident—for instance, pleasure, wealth or honor—some thinking one thing, others another" while wiser folk "think that apart from these many goods there is some other good that is good in itself, and also causes all these goods to be good."⁷ The desire for immediate and tangible results might provide happiness, albeit short-lived, but it does not necessarily aim toward the final good, or *eudaemonia*. This argument later serves as a foundation for understanding Aristotle's thoughts on friendship, where he weaves together his previous theories on happiness, community, and respect, and forms the basis for my own argument on the merit of online friendship. While Aristotle does not entirely condemn *goods* sought for the sake of achieving another good (wealth, intelligence, honors), he does posit that happiness as *eudaemonia* ought to be complete "without qualification," and states: "An end pursued in itself, we say, is more complete than an end pursued because of something else."⁸ With this argument in mind, it is easy to see how social media and online friendship would be understood as merely providing temporary and immediate satisfaction, and the connections a person makes through these technological platforms might seem to aim at good beyond friendship, such as social capital

⁷ Ibid., 199.

⁸ Ibid., 205.

and personal branding (artists, writers, and entrepreneurs often use Instagram for both business and personal endeavors). However, I will later address these objections and discuss how the connections a person forms online, particularly those of pleasure and utility, can still aim toward the “good life,” so long as the user is able to recognize when their behaviors lean toward artificiality and when they lean toward authenticity. This is especially true for friendships of virtue.

SELF-LOVE AND SELF-RESPECT

Virtue friendship, then, can be partially founded and sustained through online means, but I argue that it is imperative for individuals to include other outlets of communication beyond images, videos, and comment threads. An Aristotelean notion of a “shared life,” which I will explain more in depth later, ought to reinforce face-to-face correspondence in addition to text-based social media interaction, thus allowing for private, non-publicized friendship similar to real-world relationships where friendships have both a private and public realm. Even more, it is integral that a person respect and love themselves. For Aristotle, intersubjective discourse and genuine partnerships are not only steeped in deep understanding and reciprocated knowing of the other, but also an intimate and loving relationship with oneself. As Aristotle aptly questions: “There is also a puzzle about whether one ought to love oneself or someone else most of all; for those who like themselves most criticized. . . as self-lovers, as though this was something shameful.”⁹ While the idea of “self-love” is often read with a negative connotation, Aristotle makes a clear distinction between that type of self-relationship and egoism, as egoists seek external benefits like money and power. For Aristotle, loving oneself is to respect oneself, and a proper relationship with oneself is integral to establishing proper friendships with others. This idea of Aristotle’s, I concede, is the hardest to actualize when using social media; the constant bombardment of images and videos, many of which are meticulously edited or curated, can convince people that their

⁹ *Ibid.*, 268.

lives are not as fulfilling. Further, one's own performance on social media combined with a friend's performance creates an emotional gap, unless those friends find other means of communicating like FaceTime and text messaging.

It is also necessary to make a clear distinction between this Aristotelean notion of self-respect with the common, more contemporary notion of self-esteem. Self-esteem is often defined as a base, American focus where people place emphasis on how they feel about themselves in relation to others rather than self-respect, which focuses more on building one's own character, and is based upon doing noble deeds in the world, through civic action or intellectual discovery. This self work is often challenging and emotionally taxing, but Aristotle requires it to become virtuous—both in oneself and in relationships—thus, playing an important part of “being with” a person. In other words, developing a sense of self-respect can be facilitated by a friend, whose friendship can help foster that self-love, if the relationship is reciprocal and mutual. Online friendship, like real-life friendship, can help people become better versions of themselves—more *eudaemonic*—with consistent, genuine conversation. Instagram and Facebook both provide a myriad of tools to effectively communicate with other people, which reinforces proper friendship and strengthens one's ability to build character.

INSTAGRAM AND FACEBOOK AS TOOLS FOR FRIENDSHIP

In my argument, I look at two social media sites in particular—Instagram and Facebook—and analyze whether authentic friendship can be founded and fostered through them; however, I do focus primarily on Instagram, since it offers a more complicated conception of friendship. Unlike other social media platforms, Instagram is primarily a photo-sharing website. Users can create private or public accounts, share photographs and videos, and communicate with other users through direct messages and photo comments. More importantly, however, it is an app designed for a Smartphone, such as an iPhone or Android,

making it a portable and accessible way to connect with others.¹⁰ What distinguishes Instagram from Facebook, for example, is that it focuses on the individual person and not on memes, news, or others' digital clutter. Essentially, the site serves as an online persona—manufactured and designed by the user themselves—for a viewing populace, whether that be real-life friends or mutual followers. “Photos and videos are the main event, and text, while present, is mostly confined to captions and comments,” writes Kevin Roose in his article about Instagram’s superiority to Facebook. “As a result, Instagram feels more intimate than Facebook.”¹¹ This paradox of intimacy and aloneness is exactly why online friendship is a sometimes fulfilling, but sometimes alienating way to interact with other people. More particularly, too, is the image-centered display of Instagram and its ability to inaccurately portray information; people are able to create ideal versions of themselves, even when their online profiles do not align with their real-world identity. In a study about the pervasiveness of online photo-sharing as a means for emotional connection, Charlotte Champion writes about the power of an Instagram photograph. “Conditioned in part by the extrinsic character of a social networking service,” she starts, “the Instagram photograph shapes the ways in which its users visually record their everyday lives and, importantly, has an affect on what is considered photo-worthy.”¹² Since the very nature of Instagram appears to perpetuate inauthenticity, it would seem unlikely that any Aristotelian friendship could endure, even relationships of pleasure and utility. However, I will argue that the social media platforms encourage Aristotle’s theory of a “shared life” through the ways in which people can exchange thoughts, ideas, and information with others.

¹⁰ J.D. Bierdsdorfer, “Sharing Your Story in Instagram,” *The New York Times*, Mar. 21, 2018.

¹¹ Kevin Roose, “What if a Healthier Facebook Is Just...Instagram?” *The New York Times*, Jan. 22, 2018.

¹² Charlotte Champion, “Instagram: je suis-la?” *Philosophy of Photography* 3, no.1 (2012): 84.

A “SHARED LIFE” ON INSTAGRAM

Aristotle’s notion of a “shared life” is what distinguishes these lesser friendships from more virtuous ones, since virtuous friendships require “living with” another. While this idea can be taken up literally (communal living, consistent physical interaction), some philosophers attempt to show how the Aristotelian perspective on a shared life can be taken up more indirectly, particularly through social media. In her article about online friendship, Alexis Elder offers an Aristotelean defense of sites like Facebook and Instagram, beginning first with a succinct summary of Aristotle’s virtue friendship: “Virtue friendships are the best forms of friendship, but take the most time to develop, and are the most rare—because, as Aristotle points out, good people are relatively rare compared to people we might find useful or pleasant.”¹³ This slow, often lifelong development of friendship provides the necessary time and space for two individuals to grow alongside another. However, in practice, virtuous friends “cannot know each other before they have shared the traditional <peck of> salt.”¹⁴ Aristotle defines this act of sharing as something more than merely exchanging text messages or photos; he claims that a proper “shared life” ought to include a sharing of intellectual thought about civic life, virtuous activity, and proper relationships. In other words, the quick paced environment of Internet sharing may not be conducive to an Aristotelean notion of friendship. “A shared life,” which includes these exchanges of thoughts and ideas, is foundational for all three of Aristotle’s types of friendships, even though friendships of utility and pleasure are seen as not as fulfilling. However, like Aristotle, Elder acknowledges the importance of pleasurable and utilitarian friendships and their role in achieving happiness, and does not argue that these lesser friendships are insignificant; rather, she posits that virtuous friendships “begin as [these] lesser friendships. It takes time and repeated interactions for people to become familiar with each

¹³ Alexis Elder, “Excellent Online Friendships: An Aristotelean Defense of Social Media,” *Ethics and Information Technology* 16, no. 4 (2014): 288.

¹⁴ Aristotle, 268.

other's characters."¹⁵ As the intention of this paper is to focus on whether virtuous friendships can exist online, I will not focus on utilitarian and pleasurable friendships; although, I argue that they can exist easier on social networking sites, because they are rooted in immediate happiness like "likes," instantaneous comment threads, interest pages, and aestheticism.

As I previously mentioned, Instagram is an image-based social media site that can foster a false sense of "shared living," especially since it is aesthetically limited to photographs, videos, and short text. However, I argue that the ability to feel emotional connection and attachment to online friends through this form of sharing shows the possibility for virtuous friendship online. "In one sense, social media and other forms of online interaction seem antithetical to shared living because they do not (or need not) involve physical cohabitation," writes Elder.¹⁶ "But in explaining what he means by the shared life, Aristotle clarifies that for human beings, living together is accomplished by sharing 'conversation and thought,' not 'grazing in the same field, like cattle.'"¹⁷ If we are to take this reading of Aristotle's argument and apply it to Instagram friendship, it seems that this sharing of ideas, thoughts, and images could provide the necessary reciprocation and mutual respect required from virtuous friendships. While they are instantaneous by nature, as well as digitally constructed and received, these exchanges can offer similarly deep and engaging dialogue. As I intend to argue, virtual conversation does not necessarily make an exchange shallow; however, I do acknowledge that written text often lacks the emotional subtext needed to properly comprehend another's intentions. Even more, virtue friends do not see one another as ends in themselves; rather, "she is perceived by the friend—and the friend reciprocates perceiving her in turn—to be sharing in the valued activity and the valuing, thus expanding each friend's capacity for enjoying worthwhile events."¹⁸ However, friendships founded on social media are often seen as lacking

¹⁵ Elder, 288.

¹⁶ Ibid.

¹⁷ Ibid.

¹⁸ Ibid.

genuine “knowing” of the other, or a true understanding of the other person’s authentic identity and self. If Aristotle’s notion of a shared life includes experiences like philosophizing, exercising, and learning together, what sort of experiences can online friends share that foster similarly satisfying relationships?

RECIPROCITY AND RECOGNITION

Several years ago, I befriended a co-worker, Maia, whose interests in art, culture, and photography aligned with my own. While our conversations were devoid of serious discussion, the two of us shared many experiences together, including physical labor (we worked as tractor operators) and meal-times. The boundaries of this relationship did not extend beyond those that define friendships of pleasure and utility. This friend, as far as I understood, was a fair-weather companion who kept me company during the afternoons, and while I thoroughly enjoyed our time together, I did not fully recognize her as her own person separate from my own wants and desires. In addition to this “real-world” friendship, we also established an online relationship through Instagram, Facebook, and text-messaging; however, these forms of communication were rare and often reinforced the already limited knowledge we had of the other. Strangely, though, when Maia moved away, our relationship deepened and expanded through Instagram, text messaging, and Facetime, as we continued to share photographs, memes, podcasts, and conversation. As Alexis Elder argues in her article, we were developing an Aristotelian notion of virtue friendship by participating in a “shared life,” and as this relationship continued to grow, we began to mutually respect the other as good in-ourselves.¹⁹ Within this newfound friendship—a relationship fostered through virtual means—the two of us frequently noted we better understood ourselves as people: our desires, our emotions, our endeavors. For Aristotle, as I have mentioned before, virtuous friendships are a part of a *eudaemoniaic* life, since those friendships stem from a deeply recognized self-love and understanding that extends beyond the various relationships

¹⁹ Ibid.

that later influence one's life. The obvious danger of virtual friendship is that an individual chooses to see another person as a mere reflection of their own pleasures and uses, thus putting the individual at risk of damaging both their relationship with another and their relationship with themselves.

In her article about new social media and friendship, Shannon Vallor argues that virtue friendship can exist on sites like Instagram and Facebook, as she directly applies some of Aristotle's central tenants from his *Ethics* to the conversation on modern, virtual friendship. For Vallor, online friendship is possible if reciprocity and self-knowledge are primarily prevalent: two integral ideas within Aristotle's argument on virtue friendship. "For what does it mean to relate to my friend as another self," asks Vallor, "and how does this relate to virtue and the good life for human beings, on and offline?"²⁰ In my friendship with Maia, I grew to relate to her while simultaneously learning to recognize myself, thus allowing our friendship to deepen. Vallor defines self-knowledge similarly to how Aristotle defines it in his *Ethics*: "Self knowledge in the Aristotelean sense is a matter of understanding properly where I fit in the world, what my proper role in it is, and the capacities I have (or lack) for actively flourishing in those roles."²¹ Self-knowledge, then, is a dual recognition of one's self and another, where a person is able to identify the role and capacities of a friend in tandem with their own actualization. In the same vein, Aristotle also claims that this self-knowledge derives "through the meditation of another, specifically, a complete friend of virtue."²² Maia and I share a life together, albeit virtually, and we exchange ideas, language, and mutual respect. Can these "new social media" websites (Instagram and Facebook) foster proper reciprocity? As Vallor states: "This mirroring [reciprocity] must not be a matter of coincidence, but the result of living well together, of sharing good thoughts and actions."²³ If a person intends to apply an Aristotelian

²⁰ Shannon Vallor, "Flourishing on Facebook: Virtue Friendship and New Social Media," *Ethics and Information Technology* 14, no. 3 (2012): 193.

²¹ *Ibid.*, 193.

²² *Ibid.*

²³ *Ibid.*, 194.

notion of virtue friendship to their interactions online, then I argue it is imperative that that individual seek friendship for its own sake. However, I acknowledge that this is particularly challenging since social media profiles are often a skewed representation of a person, making it all the more difficult to establish authentic relationships.

FRIENDSHIPS AS PERFORMATIVE

One of the primary objections to the authenticity of online friendship is the way in which people can “market” themselves through their social media accounts. On Instagram, for example, users manufacture and curate their lives by posting edited photographs. The aestheticism of this action either attracts other users (artists following artists, or mothers following mothers) or detracts them. Additionally, a virtual friendship is often initiated when one person requests to follow another person’s content, thus allowing the two users to interact with each other. This digital courting is rooted in Aristotle’s theories on friends of utility and pleasure; a person “follows” another based solely on visual components like photographs and videos, which either offers them pleasure or usefulness. Many argue that this kind of interaction also fosters a false sense of “knowing” another completely and fully, since online personas are performed for a particular audience. These common characteristics of virtual friendships make it difficult for an individual to seek friendship online for its own sake, as Aristotle argues, since it is challenging to recognize whether the partnership is virtuous and complete, or if it only has the appearances of being so.

The inherent performance and self-branding quality of sites like Instagram and Facebook make it harder to recognize other individuals as complete and virtuous on their own terms. Even more, online friendships are often seen as ingenuous and self-absorbed. While Maia and I do have a relationship online, it stemmed originally from a physical friendship of pleasure and utility, which later formed itself into a friendship of virtue. However, much of our relationship is publicized through mutual photo sharing, commenting, and advertising (we are also two artists working on a project together), and our respective accounts

make our private friendship public, thus not allowing for an Aristotelian notion of intimacy.²⁴ As Krista Burton wrote in her *New York Times* piece: “Is a relationship real if it’s not flaunted on Instagram? Is the new definition of a commitment-phobe someone who chooses to keep relationships offline?”²⁵ Even so, intimacy is not synonymous with secrecy; “real-world” relationships have both public components and private ones. “Friends can socialize at parties, making their conversations implicitly open to other partygoers, and such conversations may constitute rich and fulfilling lives between friends.”²⁶ Additionally, most social media platforms provide private methods of communication, including direct messages and private photo sharing. As an avid user of Facebook and Instagram, I supplement my interactions with friends with FaceTime video: a video app that allows opportunity for face-to-face conversation. In this way, virtual relationships resemble much of what physical relationships embody, without those elements of physical intimacy that Aristotle calls for.

It is important that I clarify that online friendships cannot form and sustain themselves solely on websites like Instagram and Facebook. While I do argue that they can provide similarly satisfying and fulfilling experiences, they ought to be supplemented by other virtual modes of communication, like text messaging, FaceTime video, and phone calls. This ensures that a friendship has both private and public realms, where the two individuals can learn about the other authentically and without performative dialogue or photographs. Even more, face-to-face interaction, regardless of whether it is virtual, provides a space for two individuals to “share a life” in an Aristotelean sense: real-time conversation, eye contact, and voice registration. People explore philosophical ideas and engage in political debates. The advancement of technology, I argue, has opened many avenues for people to foster, sustain, and strengthen friendships. Just as real-world friendships take time and effort, I argue that online friendships require the same attention

²⁴ Elder, 290.

²⁵ Burton.

²⁶ Elder, 290.

and discipline. They are not easier modes of friendship; rather, they enhance, or contribute to, a well-rounded relationship between two persons.

OBJECTIONS TO THE AUTHENTICITY OF ONLINE FRIENDSHIP

Thus far, I have argued that virtuous friendships can exist online through various methods, including messaging apps and photo sharing. Through using Aristotelean theory on “shared living,” as well as his conversation on self-love and respect, I posited that two individuals can foster a virtual friendship with the same benefits as those friendships formed offline. However, one of the major objections against those who argue the fecundity of online friendship is that of superficiality and inauthenticity. Even more, opponents of Internet friendship claim that they are not as rich as a wholly embodied, multi-sensory life experience—a genuine “being with” a person—since they only involve verbal, visual, and (sometimes) aural modes of communication. As I previously mentioned, the inability to truly understand and “know” another person online is precisely what makes online friendship difficult to establish, and establish well. However, this “deceptiveness,” as Elder argues, is not unique to online platforms like Facebook and Instagram. Although it is drastically easier to deceive, manipulate, or curate one’s image for a general populace on Instagram and Facebook, it is just as commonplace to “perform” an identity in face-to-face interaction.²⁷ Tone of voice, emotional overlay, and body language have the power to coerce persons into thinking a particular thing about their personality. This is not to see that human beings are easily tricked, but it is important to acknowledge that most people do not present their most authentic selves during a first interaction. I argue that with time and consistent conversation do two people begin to truly understand the other, either virtually or physically. Performance, then, appears to pervade all facets of intersubjectivity, including offline and online communication, and does not specifically diminish the quality of

²⁷ *Ibid.*, 292.

virtue friendship on sites like Instagram and Facebook. However, the lack of physicality affects all aspects of Aristotle's notion of virtue friendship, including a "shared life," mutual respect, and authenticity. Social media places individuals in physically isolated situations, where a person can spend upwards of a few hours scrolling through images and text-based threads. While I argue that it is possible to form and sustain virtue friendship online, I acknowledge the risk of the Internet and its ability to isolate an individual.

This common objection—that of an overall lack of physical touch—is often interpreted through a "loneliness objection," which infers that users of social media simultaneously feel connected and alienated, since online communication encourages consistent communication without physical benefits, like casual touching or the literal sharing of a physical space. While this objection is fruitful and offers insight into an aspect of friendship that is often overlooked, it is important to evaluate this objection and how it pertains to the flourishing of online friendship. In a study published by researchers at the University of Oregon, data showed that sites like Instagram were "associated with lower levels of loneliness amongst users, and higher levels of happiness and satisfaction" when compared to other social media outlets.²⁸ Since Instagram is largely image-based and lacks the usual digital clutter of news, articles, and comment threads, it tends to foster a sense of intimacy with other users. For many people, that "intimacy" is worrisome, since it exists solely in the mind of an individual without physical interaction or validation. Even more, the person is entirely invested in their phone, computer, or tablet; the "outside world" is all but absent in the event that a person *only* has online friendships. "On the surface," writes researchers Matthew Pittman and Brandon Reich, "it seems that the increased realism and definition of communication should make people feel more connected with others, but the rate at which new social media platforms are released, initially adopted, popularized, and (possibly) obsolesced makes it difficult to study how any specific platform affects

²⁸ Roose.

loneliness.”²⁹ As I have stated before, one of Aristotle’s necessary terms for virtue friendship is to “be with” another, to see them actualize their human capacities, and to live well together. The feeling of loneliness is not specific to online communication, but it is often stronger on social media, since the experience of processing information is very much one-sided. Elder continues with this objection, arguing that “as social creatures, many of our social needs may be met through online interaction—but some may not be...physical touch is not typically recognized as an important component of friendship and is often considered taboo.”³⁰ With physical touch I would also include eye contact, sharing of space, and emotional intimacy, much of which is absent from online communication that is solely kept to social media sites. Essentially, online friendship lacks the wholly embodied experience. However, online friendship includes multiple components like FaceTime video, which allows eye contact and sharing of space, albeit virtual. As the parameters of this paper focus more on the possibility of virtue friendship online, I will not delve deeply into social research regarding Internet usage, as this involves the intense study of multiple persons, age groups, and incentives. However, as technology continues to advance, it is fair to assume that online friendship will become more nuanced, and the gaps which previously kept one individual from connecting with another will close.

CONCLUSION

After I read that Krista Burton article on Facebook, feeling simultaneously inspired and offended, I immediately shared it with Maia by tagging her in the comment thread. Within minutes, my phone lit up; Maia had sent me a text message in response, and she agreed that Burton was especially harsh in her portrayal of online friendship. However, we both talked about the ways in which our

²⁹ Matthew Pittman and Brandon Reich, “Social Media and Loneliness: Why an Instagram Picture May Be Worth More Than a Thousand Twitter Words,” *Computers in Human Nature* 62 (2016): 156.

³⁰ Elder, 292.

own friendship, as well as others we have been in, can sometimes feel like a performance. Maia texted: “Totally. And it was very ‘with the times’ in terms of acknowledging how we perform relationships on the internet for the benefit of others.” The following night, the two of us had a FaceTime call, where we watched one another laugh, complain, and tear up. We argued over whether we thought Burton’s claims were fruitful, shared other pertinent articles and podcasts, as well as exchanged thoughts on how we could deepen our relationship online. It felt authentic, and good, and I realized then that online friendship is possible if both members put in the time and emotional energy just as they would in real-life friendships.

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Antelope Mask on Snow
by Ruby Shearon

False Empowerment: Institutionalization of Quechua in Taquile, Peru through Education

Abstract

The majority of research in Peru surrounding indigenous languages agrees that education in native languages improves student's academic outcomes and opportunities. However, interdisciplinary research completed on Taquile island, a community of 2,000 indigenous peoples located on Lake Titicaca in the district of Puno, Peru problematizes teaching Quechua to indigenous students. *Plan Nacional de Educación Intercultural Bilingüe EIB* (National Plan for Bilingual Intercultural Education) institutionalized Quechua in the schools of Taquile, having unintended consequences for the indigenous people there. Education in Quechua furthers systems of control that existed when the Spaniards colonized Peru, it limits their opportunities to participate fully and successfully in modern society, and it takes away local meanings of the language. The education of the indigenous peoples of Taquile in Quechua could be beneficial, only if they were given autonomy and the ability to choose how education in Quechua was implemented in their schools. The experience of Quechua for the people of Taquile was investigated using discourse analysis of school textbooks and photographs, anecdotes written during participant observation of classes, analysis of the documents written by the Peruvian Ministry of Education, and quotes from the interviews collected.

Leah Havlicek | Global Studies



Leah Havlicek studied abroad in Peru her junior year at Warren Wilson College and was excited to expand her field research working with an indigenous community on Lake Titicaca and complete her senior thesis. She is currently pursuing a career in journalism, international education, or planning her next trip to live abroad. In her free time Leah loves to backpack in the mountains, practice aials, rock climb, and volunteer with the local Asheville radio station.

INTRODUCTION

I'm sitting at a small desk, smooth down the three colored skirts (called "pulleras") that I'm wearing, and place my field guide on the desk, pencil in hand. The professor is at the front of the room, teaching a group of about twenty indigenous students about Carnival, a Catholic tradition that starts at the end of February which is celebrated throughout all of Peru. In between songs in Quechua, the professor says to the children, "Cantamos la lengua materna, el idioma de Los Incas,"¹ as he teaches the kids the moves to the dance. He says, "Cantamos [en quechua] para que la lengua no desaparezca."²

At first it would seem obvious that this indigenous school, located on the island of Taquile, a small, rural indigenous community in Peru, would sing songs and teach lessons in Quechua (known as Runasimi by native speakers), an indigenous language of the Incas. Many would think, of course, indigenous peoples speak indigenous languages, so why shouldn't Quechua be taught in schools?

In reality, this is a drastic contrast to how Quechua was treated in Peru not forty years earlier. Historically, under colonization of the Spaniards, language was used as a source of political and cultural control over the natives. After a failed indigenous rebellion, the colonizers banned any literary or theatrical work in the Quechua language and it was prohibited for almost 200 years. Although their attempts at eradicating Quechua failed, the ban erased many important literary and cultural work in Quechua during that time. Even after the regulations were lifted, Quechua was and still today is a highly stigmatized language.³

It was not until Peruvian independence that there was interest in revitalization of Quechua. The government saw the

¹ "We sing the mother language, the language of the Incas."

² "We sing [in Quechua] so the language doesn't disappear."

³ Frank Salomon and Emilio Chamblé Apaza, "Vernacular Literacy on the Lake Titicaca High Plains, Peru," *Reading Research Quarterly* 41, no. 3 (2006): 304–26.

language as an important national unifier and in 1975, the Peruvian government made Quechua their official language alongside Spanish. Peru was the first country in all of Latin America to officialize an indigenous language.⁴ Not long after, extensive education programs were created and implemented throughout all of Peru to ensure that Quechua would be “preserved,” by teaching it in every elementary and secondary school. Even some universities took up the language and are now offering some reading and writing language instruction in Quechua.⁵

The implementation of this stigmatized and underappreciated language in rural schools would seem like a huge step for indigenous peoples towards more equality and recognition after years of devaluing this language. The professor quoted at the beginning of this paper voices his concern for the language and says they must continue to sing it so it “doesn’t disappear.” The national government of Peru uses similar language; they speak about how teaching Quechua in schools will ensure the “preservation” of the language, which I will discuss later in my paper. Additionally, the Peruvian Ministry of Education is justifying the implementation of these Quechua programs by the advocacy of education intellectuals, who argue that instruction in their native language allows indigenous students a better understanding of the material and therefore allows them to do better in school.⁶

However, a case study of the people of Taquile (Taquileños) shows that teaching Quechua in rural, indigenous schools is problematic. It creates false empowerment for Taquileños, because in reality the aspirations the Nation has for the role of Quechua

⁴ Colin Post, “Quechua Completes 40 Years as Official Language in Peru” last modified May 27, 2015, <https://perureports.com/2015/05/27/quechua-completes-40-years-as-an-official-language/>.

⁵ Maria Elena Garcia, “Rethinking Bilingual Education in Peru: Intercultural Politics, State Policy and Indigenous Rights,” *International Journal of Bilingual Education and Bilingualism* 7, no. 5 (2004): 348-367.

⁶ Disa Hynsjö and Amy Damon, “Bilingual Education in Peru: Evidence on How Quechua-Medium Education Affects Indigenous Children’s Academic Achievement,” *Economics of Education Review* 53 (2016): 116–32.

are incompatible with those of the people of Taquile. The Peruvian Nation has claimed ownership over the indigenous identity and is defining it as a single, homogenous culture in its own goals for national unity, while the people of Taquile see the role of Quechua as a form of community identity and connection. The institutionalization of Quechua has unintended consequences; education in Quechua furthers systems of control that existed when the Spaniards colonized Peru, it limits their opportunities to participate fully and successfully in modern society, and it takes away local meanings of the language. In understanding language use in Peru, one must “hold multiple truths at once”⁷ and see that it is not just a black and white issue. This research will bring to light the complexities behind the language of Quechua for the people of Taquile.

METHODOLOGY

In the summer of 2017, I spent ten days on the island of Taquile with a host family and collected research at their only primary school, which has about one hundred students. The island of Taquile is located on Lake Titicaca, the largest navigable lake at the highest elevation in the world, in the district of Puno, Peru. I interviewed my host dad (age 55) and host sister (age 21) because they could both speak Spanish and were excited to contribute.⁸ I would have liked to interview my host mother (age 54), but she could not speak Spanish, only Quechua, and I am not fluent in the language. At Taquile’s primary school I completed my research through interviews of five professors and the director of the school, participant observation of five classes, analysis of class materials including textbooks, and photographs of their classrooms. My final, interdisciplinary research is discussed through discourse analysis of school textbooks and photographs, anecdotes written during participant observation of classes, analysis of the documents

⁷ Christey Carwile, “Anthropological Research” (lecture, Warren Wilson College, Swannanoa, NC, March 2018).

⁸ Taquile is a very small community, so to protect their identities, I have decided to not call my host family, the professors, or the director of the school by their names.

written by the Peruvian Ministry of Education, and quotes from the interviews I collected.⁹

INTRODUCTION TO QUECHUA

As a result of colonization by Spain for almost three hundred years, Spanish is by far the most popular language spoken in Peru; almost 80% of Peruvians speak this language. Despite this long colonial history, a number of indigenous languages are still spoken. Those languages include Aymara, Ashaninka, Awajún, Shawi, Shipibo, Quechua, and a number of others, with Quechua being by far the most widely spoken.¹⁰ Quechua, especially in the last thirty years, has been gaining more attention.

In 1975, Quechua became an official language of Peru and afterwards it was put into almost every school in Peru, in urban and rural settings. This appears to empower indigenous peoples, though the language of Quechua and formal education to indigenous peoples comes from a very difficult history and the use of Quechua in formal education was used by the colonizer as a way of control. An understanding of this history will allow us to understand the contradictions surrounding Quechua.

PRE-INCAN

The ancestors of Taquile come from a Pre-Incan society called the Pukara, who preceded the Incans by almost 2,500 years.¹¹

⁹ As an American who does not identify as indigenous, I understand that I cannot completely encapsulate all of the lived experiences of the indigenous peoples on Taquile. In regards to understanding the perspective of these peoples, I understand that there is a locked door and I can only see through the keyhole, although there is a large cavern inside. This paper attempts to create a view through that keyhole, to try and understand the lived experience of language for these people. I learned the basics of the Quechua language, but am not fluent. Therefore, all of my interviews were in Spanish, which could change the types of responses I got from these individuals, for whom Quechua is their first language.

¹⁰ John Howland Rowe, "The Distribution of Indians and Indian Languages in Peru," *Geographical Review* 37, no. 2 (1947): 202–15.

¹¹ "In Peru Highlands, Temple Remains Offer Window on Pre-Inca Civilization." *National Geographic* online. https://news.nationalgeographic.com/news/2002/02/0204_020204_tvperutemples.html.

Almost everything that we know about these people comes from archeological work, although some researchers have recorded much on the islands of Lake Titicaca. And of course we have information from their descendants—the people of Taquile that are living there today. One of the Incans' lasting influences is the spread of Quechua to the people of Taquile, which has now become the first language of all Taquileños. Specifically these people speak a Southern variety of the language, which has variations in words and tones in comparison to other varieties throughout Peru. My host mother told me, through a translation from her daughter, that she has a hard time communicating with people in Cusco who speak the Chinchay variety of Quechua because their variety has enough linguistic differences to make it difficult for her to understand them.

THE INCAN EMPIRE

Understanding Incan history will allow us to see why Taquileños speak Quechua, a language widely used by the Incas. The Incas established Quechua as the official language of their empire in order to maintain control over their conquered territories in pre-colonial Peru (13th century to 1542). They chose this language because it was already the most expanded and most widely understood.¹² Local nobility, administrators, and civil servants all used Quechua as an important tool of communication, although the use of other languages was not prohibited. Indeed, bilingualism was a common practice throughout the empire.¹³ It is difficult to calculate exact numbers, but there were actually hundreds and thousands of different languages and dialects during that time period.¹⁴ Even before the conquest of the Incas, Quechua, along with many other languages, had already spread through communities.¹⁵

¹² Gleich Utta Von, "Language Spread Policy: The Case of Quechua in the Andean Republics of Bolivia, Ecuador, and Peru," *International Journal of the Sociology of Language* 107, no. 1 (2009): 77–114.

¹³ Ibid.

¹⁴ Ibid.

¹⁵ Frank Salomon and Emilio Apaza. "Vernacular Literacy On The Lake Titicaca High Plains, Peru." *Reading Research Quarterly* 41, no. 3 (2006): 304-326.

SPANISH COLONIZATION

In 1572, the Spanish conquered the mighty Incan Empire. The colonial conquest by the Spaniards significantly changed how Quechua was used and can be seen as the origin of the stigmatization of this language. Bilingualism was not encouraged and in fact there were many colonizers who were against any indigenous language and wanted them to be extinct.¹⁶ But some indigenous languages persisted, one of those being Quechua, for a number of reasons. Quechua was chosen as the language of administration by the Spaniards because at that time it was the most widely spoken indigenous language. Some Spaniards learned Quechua in order to govern their specific territories and to be able to communicate with a portion of the indigenous population. They saw it as a way for “linguistic homogenization” that would assist in colonial control.¹⁷ Many colonizers preferred an uneducated workforce and as a form of cultural differentiation from the Spaniards, the natives were not allowed to learn the language of the colonizers. This differentiation and the lack of opportunity to learn the language of power put Quechua explicitly below Spanish, creating a power dynamic between the languages that still exists today.¹⁸

Quechua was also diffused among the populations through Spanish missionary work as well. The missionaries were concerned that their doctrine would not be properly understood if it was not written in the people’s native language. Using the Spanish alphabet, the traditionally oral language was made into a written language in order to create a translation of the Bible.¹⁹ The alphabet created by missionaries is very similar to the one used today. The Intercultural Bilingual Education Program contains a standardized alphabet of Quechua, which is used in almost every school of Peru.

Although many were not given the opportunity, there were some indigenous Mestizos who were able to learn to read

¹⁶ Ibid.

¹⁷ Garcia.

¹⁸ Ibid.

¹⁹ Salomon and Apaza.

and write in Spanish and Quechua. These bilingual elites were educated in Spanish schools and were influential in creating Quechua works of literature and theater. One of these bilingual Mestizos is known by the name of Túpac Amaru II (José Gabriel Condoranki) who led a rebellion against the Spanish army in 1780. He claimed direct descent from the last Inca murdered by the Spanish: Túpac Amaru I. The rebellion failed only after a year after its start and consequentially the Quechua language and any cultural or literary practices were prohibited, a ban which remained in effect for almost 200 years.²⁰ This meant individuals still spoke in the language, but indigenous peoples could not teach Quechua formally and significant art or literature was not recognized. As a result of this ban, most Quechua literature was lost and today there is very little written history or work still in this language.

HISTORY OF QUECHUA IN THE LAKE TITICACA BASIN

The ban on Quechua furthered stigmatization of the language, therefore in the Lake Titicaca Basin, the written word of Spanish was one of the only avenues for defiance against the colonizer because it held more political power than Quechua.²¹ However, the desire to learn Spanish was often not realized. Around 1780, the ban of Quechua was finally lifted after almost 200 years because education in Quechua was an effective way to better convert the natives to Christianity.²² Eventually, as a part of new reforms for education in rural parts of Peru, new teachers were placed at these schools, whose goals were to better educate indigenous students. And yet there were many issues with these new government funded forms of education. As “punishment” teachers were given rural postings and many were not given adequate finances or training. As a result, many abuses were reported, such as sexual misconduct, drinking, absenteeism, and corruption.²³

²⁰ Garcia.

²¹ Salomon and Apaza.

²² Ibid.

²³ Ibid.

There was also warfare over protected lands and these conflicts were extremely frightening during this time period. In the early 1990s, Peru was put into a bloody civil war that lasted for over a decade by a group called *Sendero Luminoso* (Shining Path), who created an insurgency in the area and as a result, state repression affected the Lake Titicaca Basin. The police required that villagers show identity documents every time they visited. But the villagers were afraid that if revolutionaries got a hold of them “it could lead to the massacre of people mentioned as officeholders.”²⁴

As I have outlined, education in Quechua on Taquile comes from a place of control and fear. The combination of imposed education by missionaries and the insurgency in the 1990s makes clear why many indigenous peoples in this region are still wary of formal education. Although they are no longer being taught by missionaries, Quechua is being taught by teachers from the local city of Puno to Taquileño students and has unintended consequences for the people there. On this island, formal education comes from a place of cultural, religious, and linguistic control, and although education looks different today, the remnants of this system cannot be erased completely. There is a stigma towards indigenous peoples that is still present.

I attended a math class in Taquile and was helping some of the students with their multiplication problems. I noticed the teacher was frustrated with one of the students, who was having a difficult time grasping one of the concepts. At lunch break the teacher and I were chatting and she started to explain about the students in her class, she said, “No aprenden muy rápido en lugares rurales porque carecen de nutrición. En Taquile los estudiantes sólo comen papas, sopa, y choclo. No hay un montón de verduras, pollo u otra carne. En la ciudad es muy diferente, los estudiantes son más rápidos para

²⁴ Yolanda Rodriguez, “Los Actores Sociales Y La Violencia Política En Puno,” *Allpanchis* 13, no. 39 (1992): 131-154.

*aprender.*²⁵

In my experience working with these professors, they all care about the well-being of the students; I cannot make that clear enough. However, as shown by this teacher, there are still racial and geographical stigma that professors hold surrounding indigenous peoples which inherently affect the way they think about the people of Taquile and how they teach them.²⁶

FORMAL EDUCATION AND RESURGENCE OF QUECHUA

The rise of the prominence of Quechua came as a result of indigenous intellectual movements in the region that were fighting for equality for indigenous peoples. Throughout Peru, there was unrest from indigenous peoples who had a lack of opportunities compared to their non-indigenous citizens, and the Quechua language was still highly stigmatized. José María Arguedas, an Andean anthropologist and novelist, was the most passionate supporter for the cultural independence of indigenous peoples. He created literary work in defense of the Quechua language and he became known for his use of the language alongside Spanish. He began advocating and working with ethnologists to research indigenous life and in 1946, the Peruvian Public Works was founded, which focused on the “cultural recovery” of indigenous art, culture, religion, and language (which included Quechua).²⁷

With the encouragement and support of Arguedas, Juan Velasco Alvarado, the 58th president of Peru, implemented a series of social reforms aimed at improving conditions of indigenous

²⁵ “[Taquileños] do not learn very quickly in rural places because they lack nutrition. In Taquile, the students only eat potatoes, soup, and ‘choclo.’ There are not a lot of vegetables, chicken, or other meat. In the city it is very different, the students are very quick to learn.”

²⁶ Juan Zevallos Aguilar, *Indigenismo Y Nacion: Los Retos a La Representacion de La Subalternidad Aymara Y Quechua En El Bolefin Titikaka* (Villanova University, 1959).

²⁷ Von.

peoples in Peru.²⁸ This included a series of education reforms implemented in 1972 called *El Plan Nacional de Educación Intercultural Bilingüe* (National Plan for Bilingual Intercultural Education) which aimed to bring education opportunities to all Peruvians. Specifically they also focused on giving education to indigenous peoples in Spanish and these community's indigenous languages. In 1976, a year after Quechua was made an official language alongside Spanish, Quechua was required to be taught in all schools, at every level.²⁹ This was a huge step, especially considering that teaching of Quechua was prohibited since the 1780s.

In the Lake Titicaca Basin, formal education was implemented from 1963 to 1968, by Fernando Belaunde Terry, Peru's president at the time. He created a comprehensive program that brought formal education specifically to rural, indigenous communities of Peru. Government funded primary and secondary schools were built in numbers in the countryside, which increased the access to an education and literacy.³⁰

RELATIONSHIP BETWEEN NATIONAL IDENTITY AND QUECHUA

I sit in a class at the only primary school in Taquile, created and funded by the Peruvian government, after wide-sweeping educational reforms brought new government educational materials, teachers from the neighboring city of Puno, new curriculum, and a focus on Quechua to Taquile. This specific class was for instruction in reading and writing, which taught students in Quechua and Spanish. The professors lent me state textbooks to peruse and I find an interesting page at the end of a book that is used to help students to read and write in Quechua. It shows indigenous students in front of the Peruvian flag and they are singing the Peruvian National Anthem that has been translated into Quechua. I asked my host family's neighbor about this, and she told me that before the national

²⁸ Garcia.

²⁹ Ibid.

³⁰ Salomon and Apaza.

anthem had been in Spanish, but recently, probably in 2014 or 2015, the schools started to sing the anthem in Quechua.

*Llaqta runam unay wata mat'isqa
takyachiqnin washata aysarqan
wiñaychasqa usuy warma kaymanmi,
unay pacham phutikuq ch'inlla. (kutiy)*

*Willka qapariynin ñak'aymanta,
qispiy qucha patapi uyarkun
ñak'ay warma kayninta chhapchrispam
k'umuchisqa, k'umuchisqa mat'inta huqarin. (kutiy)³¹*

Why would the Peruvian national anthem be sung in Quechua? This image of indigenous children, standing in front of the national flag, is a powerful indicator of how Quechua has changed in relation to identity in Peru. I have realized there is a complex relationship between the Peruvian nation and indigeneity, in which Quechua plays an important role.

In 1824, the Peruvian nation was founded and a language was needed to be chosen for a source of unity within the country. Spanish seemed like a good choice, especially with its political power and overall dominance. And yet, it could not be differentiated from Spain, so Quechua was chosen as a unifying language because it was seen as an identity that was distinctly Peruvian.³² Specifically, Quechua's roots in the formation of the nation can be found in indigenous independence movements that were integral to the formation of the Peruvian nation.

Bilingual Mestizos, like Túpac Amaru II (José Gabriel Condoranki), created the manifestation of nationalist sentiment towards a Spanish and Quechua identity.³³ Amaru II is remembered as a hero in Peruvian society and a important symbol for national

³¹ The Peruvian national anthem, in Quechua. The national anthem was taken from a state textbook found on Taquile's school that taught reading and writing in Quechua.

³² Garcia.

³³ Ibid.

unity, especially in the city of Cusco, their capital. On a daily commute throughout Cusco, I would see street names and statues that honor his memory. He claimed direct descent from the last Inca murdered by the Spanish: Túpac Amaru I. And although it is unclear as to whether or not he actually was kin to the this famous Incan, this story plays a powerful role in defining national unity for the Peruvian people. Often intellectuals and commoners alike in Cusco refer to Quechua as the mother tongue of the Incans, a myth told to create a hierarchy over all other Quechua varieties and to create a strong connection between this language, their Incan past, and Peruvian national identity.³⁴

THE PERUVIAN NATION'S ASPIRATIONS FOR QUECHUA

The Peruvian Nation's goal for Quechua is to create national unity and to "preserve" indigenous languages. Part of their strategy to accomplish this was the creation of a bilingual education program in 2015 that teaches all students, including indigenous students, in Quechua. This plan is called the *Plan Nacional Educación Bilingüe* (National Intercultural and Bilingual Education Plan), facilitated by the *Ministerio de Educación de Perú* (The Ministry of Education of Peru), which created a goal to eventually bring intercultural bilingual education to 100 percent of all indigenous peoples in rural places of Peru. The Ministry of Education defines this type of education as having "...*un currículo y propuesta pedagógica intercultural y bilingüe, con materiales educativos pertinentes en castellano y en la lengua originaria, con docentes formados en EIB y con manejo de ambos idiomas.*"^{35,36} Their goals are to "...*enseñarse a niños y niñas de los pueblos interesados*

³⁴ Von.

³⁵ "...an intercultural and bilingual pedagogical curriculum and proposal, with relevant educational materials in Spanish and the original language, with teachers trained in EIB (intercultural bilingual education) and with the use of both languages."

³⁶ Aurelio Merma Ercco, "La educación intercultural bilingüe en el Perú", Monografias.com, <https://www.monografias.com/trabajos106/educacion-intercultural-bilingue-peru/educacion-intercultural-bilingue-peru.shtml>.

en leer y escribir en su propia lengua indígena y castellano.^{37,38} This National Intercultural and Bilingual Education Plan includes a number of other indigenous languages being taught alongside Spanish in villages all across Peru. The Ministry of Education website shows the National Plan of Intercultural Education which also teaches in Aimara, Ashaninka, Awajun, Shawi, Shipibo, and Quechua. This education plan is what has influenced the primary and secondary schools of Taquile, bringing education materials and trained professors that are teaching reading and writing in Quechua. Another one of their goals is to “*implementando una EIB para zonas urbanas, rurales, para aquellos que tienen que revitalizar su lengua.*”^{39,40} The Nation is making it appear that by including Quechua in the curriculum, they are including indigenous peoples into the national identity, giving them autonomy and authority within this identity.

However, this is false empowerment, and in reality, formal education in Quechua has two negative impacts for the people of Taquile; education in their native language makes them “traditional,” limiting their opportunities to participate in modern society. Also, by institutionalizing Quechua, local definitions of the language are taken.

QUECHUA LIMITS OPPORTUNITIES FOR TAQUILEÑOS

The Ministry of Education argues for implementation of the education in Quechua by arguing the need to “revitalize” and “preserve” indigenous languages.⁴¹ I argue that this type of language distracts from the ability of these programs to be improved for the people of Taquile. The argument for education in Quechua actually makes it more difficult for Taquile’s schools to have comprehensive programs that actually improve Taquileño students’ opportunities.

³⁷ “...teach interested children in indigenous villages to read and write in their own indigenous language and Spanish.”

³⁸ Ministerio de Educación, “Plan Nacional de Educación EIB,” Perú: 2015.

³⁹ “Implement Intercultural Bilingual Education for urban and rural zones, in order to revitalize their languages.”

⁴⁰ Ibid.

⁴¹ Ibid.

The Peruvian Nation is using neoliberal multiculturalism to justify the use of Quechua in rural, indigenous schools. This term comes from the result of neoliberal economic growth that has occurred at the same time as many indigenous movements, therefore many economic policies have had to address multicultural rights in Peru.⁴² Neoliberal and capitalistic reforms include the “embrace of market economies and integration, decentralization of the state, and promotion of individualism.”⁴³ Neoliberal multicultural policies address multicultural rights, “without resolving socioeconomic inequalities” and often choose policies that appear inclusive, but do not address adequately indigenous disparities.⁴⁴ Indigenous peoples are some of the poorest individuals in Peru in regards to access to resources, so the inclusion of Quechua as an official language has done little to improve indigenous opportunities. For example, Quechua was made an official language alongside Spanish, which addresses indigenous rights, but *how* Quechua would be an official language was never put into Peruvian law.⁴⁵

Despite Quechua’s position as an official language, there are great disparities that exist among indigenous and non-indigenous peoples today. The new Intercultural Bilingual Education policies have attempted to create multicultural and inclusive policies; however, as defined by neoliberal multiculturalism, we can see that these programs create false empowerment for indigenous peoples.

While supporting multicultural ideals, the Peruvian government is arguing for the “preservation” of indigenous languages, but this type of language makes Taquileños appear as if they are merely traditional and that their culture can be preserved within a bottled time capsule. The argument to preserve indigenous

⁴² Charles R. Hale, “Neoliberal Multiculturalism,” *PoLAR: Political and Legal Anthropology Review* 28, no. 1 (2005): 10–19.

⁴³ Julie Velásquez Runk, “Indigenous Land and Environmental Conflicts in Panama: Neoliberal Multiculturalism, Changing Legislation, and Human Rights,” *Journal of Latin American Geography* 11, no. 2 (2012): 21–47.

⁴⁴ Hale.

⁴⁵ Kay B. Warren and Jean E. Jackson, *Indigenous Movements, Self-Representation, and the State in Latin America* (University of Texas Press, 2002).

languages is incorrect because cultural traditions like language change constantly, so there can only be what is new, “although what is new can take on symbolic value as ‘traditional.’”⁴⁶ The Nation is defining its citizens as either indigenous or non-indigenous, modern or traditional, local or global. Indeed, these systems inform and influence the ways indigenous peoples negotiate themselves, although one is not independent of another. Indigenous peoples actually “negotiate these ideologies and multiple identities simultaneously,” which creates a perception that they contradict themselves in their cultural beliefs and traditions.⁴⁷

The Nation wants them to speak their “native language” which creates a false dichotomy between “traditional” and “modern,” defining indigenous peoples as purely indigenous. In reality this division between modernity and tradition is completely false because indigenous peoples exist within these two spaces simultaneously.

On the first day I arrived on the island, my family said that they had something for me; they came out with three “pulleras” (many women on Taquile wear three colorful “pulleras” [colorful skirts] every day; on her wedding my host mother said she wore ten), a scarf, and a blouse; clothes that all the women wear on the island. I was flattered and unsure as to whether or not it was okay for me to wear them, but my host sister and mother excitedly helped me put on each part of the clothing. I proudly wore the clothing every day of my time at Taquile, knowing that it meant a lot to my host family. On the days at the school, I spoke with the professors in between classes. Many asked me, “Where did you get that skirt? Why are you wearing one?” There were many who thought it was really amusing to see a “gringa” wearing indigenous clothing.

The teachers’ reaction to a “modern” tourist wearing

⁴⁶ Richard Handler and Jocelyn Linnekin, “Tradition, Genuine or Spurious,” *The Journal of American Folklore* 97, no. 385 (1984): 271-290.

⁴⁷ Siti Kusujarti et al., “Unveiling the Mysteries Aceh, Indonesia: Local and Global Intersections of Women’s Agency,” *Journal of International Women’s Studies* 16, no. 3 (2015): 186-202.

indigenous clothing shows the way the people in Peru think about indigeneity. To the teachers, a foreigner should *not* be wearing indigenous clothing because those should only be for “traditional,” indigenous peoples.

Language traditions, like speaking Quechua, can never be spoken or practiced in exactly the same way as they were before. Cultural traditions are continually changing “interpretations of the past,” that accommodate and adapt to new situations and needs of the community.⁴⁸ Varieties of Quechua today contain influences of Spanish and other modern words which makes the language sound very different than when it was spoken in the time of the Incas. So this goal to “preserve” an ancient language is unfounded because indigenous peoples are speaking this language in a contemporary context. Their traditions of speaking Quechua are modern, current practices of remembering and interpreting the past.

Since the 1900s, there have been large changes on the island of Taquile. For example, tourism has expanded immensely, creating a large amount of jobs for the people there. Since 2001, there has been an increasing number of visitors, bringing about 41,000 tourists annually.⁴⁹ As a tourist, you can have a complete tour of the island, eat their freshly caught trout and fried potatoes, and even stay with a host family for a couple of nights. I learned that with new tourism there was implementation of a fresh water system that brought water to many points on the island. Almost every home has solar panels that give them electricity and some families even have solar showers.

I asked my host dad if he thought the island had changed at all and he said, “[*La isla*] *no ha cambiado mucho. A los jóvenes les gusta [la música] rock mucho, mientras a las generaciones viejas les gusta la música Andina. Casi igual, no hay muchos cambios.*”⁵⁰

⁴⁸ Handler and Linnekin.

⁴⁹ Annelou Ypeij and Elayne Zorn, “Taquile: A Peruvian Tourist Island Struggling for Control,” *European Review of Latin American and Caribbean Studies* 82 (2007): 119–28.

⁵⁰ “[The Island] has not changed much. The young kids like rock [music] a lot, while the older generations like Andean music. Almost the same, there are not many changes.”

I knew there were new education programs in the school, implemented by the Ministry of Education, and it surprised me that my host dad did not mention this change. But throughout my days living and speaking with many Taquileños, I realized what my host dad meant by things remaining fairly unaffected. The values and strong community of Taquile have not changed. They now have radio, listen to different music, have solar panels, heated water, but their values and the use of Quechua as a community language has not changed. My host dad is not concerned that specific traditions and modern conveniences are coming into their community; he does not see it as a threat that kids are listening to rock music now.

Frank Salomon and Emilio Chambi Apaza completed a study that looked at vernacular writing of indigenous languages in the Lake Titicaca Basin community of Azángaro. On this similar island to Taquile, they found that some indigenous parents were against teaching their children in Quechua. Their fear was that if a child is taught how to read and write in Quechua, they will never master the actual language of power (Spanish).⁵¹ Similarly, my host dad did not think his children needed to be taught Quechua. He told me, *“Hay más castellano en las escuelas ahora, las escuelas están cambiando. Esto es mejor, Quechua es solamente para la isla. Cuando salimos para Puno, y otros lugares, necesitamos español. Quechua es solamente para la casa, para la comunidad. Es bueno aprender español, para salir, para cualquier cosa.”*⁵² My host dad sees Spanish as a language to give Taquileños opportunities outside of their community, in order to communicate and be fluent in the outside world. He sees Quechua as a language that only needs to be spoken in the home, only for the Taquile community. My host sister shared similar ideas about Quechua; she did not see that it had a place in her school. I asked her what she learned at school and what she learned at home, she responded, *“En la escuela aprendimos como*

⁵¹ Salomon and Apaza.

⁵² “There is more Spanish in the schools now, the schools are changing. This is better, Quechua is only for the island. When we leave for Puno, and other places, we need Spanish. Quechua is only for the home, for the community. It is good to learn Spanish, in order to leave, for whatever things [we need].”

*leer y escribir en castellano. En la casa, sobre felicidad y amor.*⁵³ She sees the home as a strong mover of values and the school only as a place for reading and writing in Spanish.

My host dad specifically wanted more focus in learning Spanish, because “...*el colegio es muy bajo, los estudiantes no están preparando para la universidad en Puno.*”⁵⁴ He is talking about the university in the closest city of Puno. Professors at the school also told me that almost no students at Taquile could go to the university to continue their education because the school on the island was not rigorous enough and many families did not have enough money to send their children to college. The college in Puno is almost completely in Spanish, making the ability to master this dominant language that much more important.⁵⁵ Their education systems are also one of the least affordable in Latin America; the government only invests 3.3% of its GDP in education.⁵⁶

Additionally, Taquile’s school does not empower many students to feel comfortable in the language of power (Spanish). My host sister spoke about this experience; she explained to me why she feels more comfortable speaking Quechua, “*En las escuelas yo casi nunca hablaba [en castellano] porque tenía miedo para pronunciar o que se digo mal. Hay otros que hablan perfectamente pero no hablamos [mi familia y yo] en casa. Y mi madre también no puede [hablar castellano].*”⁵⁷ Her fear to speak Spanish in school

⁵³ “In school we learn how to read and write in Spanish. In the home, [we learn] about happiness and love.”

⁵⁴ “The high school [level] is very low, the students are not prepared for the college in Puno.”

⁵⁵ “Portal de Transparencia,” Universidad Nacional Del Altiplano - UNAP, accessed <https://portal.unap.edu.pe/>.

⁵⁶ “Peru Commits to Bilingualism with a New Focus on English,” *ICEF Monitor - Market Intelligence for International Student Recruitment* (blog), January 29, 2016, <http://monitor.icef.com/2016/01/peru-commits-to-bilingualism-with-a-new-focus-on-english/>

⁵⁷ In school I almost never spoke in Spanish because I was afraid to pronounce or say something wrong. There are others that speak perfectly, but [my family and I] do not speak [Spanish] in the house. And my mother also, she cannot [speak Spanish].

must come from the teachers not allowing her to feel comfortable to speak the language.

As I mentioned, the island's economy is largely based around tourism, therefore the ability to speak in Spanish is very important because most tourists cannot speak Quechua. My neighbor told me how her son has been improving his Spanish, she told me, “[Él] *está mejorando con las turistas, antes él estaba muy tímido. Pero, está acostumbrado y le gusta hablar con los extranjeros.*”⁵⁸ She is outlining a direct connection between the ability to speak Spanish and feeling more comfortable interacting with tourists, which will help him be more successful in the future. I asked my host father what role tourism has on the island of Taquile and he said, “*Si no había turismo, no había gente.*”⁵⁹ He means that if there had not been tourism to give people jobs on the island, many would not have had enough resources to sustain themselves and would have probably left. Additionally, the ability to speak Spanish allows Taquileños to travel outside of the island and have connections outside of their community.

Alongside Spanish, English is the most prominent language that the majority of tourists who visit Taquile speak. Many professors and the director of the school told me the ability to speak English would improve many opportunities for the people of Taquile, but the implementation of Quechua distracts from English being implemented in this school. The Peruvian government understands English's ability to empower its citizens in an increasingly globally connected world because in all urban, non-indigenous schools they have implemented bilingual educational programs that include English.⁶⁰ However, the Peruvian Nation emphasizes the “preservation” of indigenous languages as the top priority in rural schools and therefore no programs have been made to teach English in indigenous schools.⁶¹ Despite this view from the Nation, the director of the school, many professors, and

⁵⁸ [He] is improving with the tourists, before he was very shy. But now he is accustomed and he likes to speak with foreigners.

⁵⁹ If there was no tourism, there would be no people.

⁶⁰ Ministerio de Educación.

⁶¹ Ibid.

my host dad spoke about how English would expand the student's opportunities. Two professors told me that "*inglés es importante para proveer más oportunidades para los estudiantes.*"⁶²

The director of the Taquile's school told me that he is going to advocate for English curriculum. However, he was not very confident that the education council would have much influence in The Ministry of Education. He said, "*Faltamos materiales educacionales en general, por eso, no tengo mucha confianza en que vamos a recibir más apoyo del estado.*"⁶³ There is a new Bilingual Education Plan that will be implemented in 2021 in all schools throughout Peru that has a strong focus building English proficiency in the country.⁶⁴ I thought this new plan would bring new materials, curriculum, and training to Taquile; however, when I asked the director about the program he said, "*El Plan Bilingüe Interculturalidad no va a afectar Taquile, porque es solamente metas para educación.*"⁶⁵ The director has seen the state make ambitious goals for education and never realize them, so he is confident that the school will not get additional support, much less more comprehensive programs that teach English, even with this new education plan that will be implemented in 2021.

In conclusion, the new education policies to teach Quechua support diversity and indigeneity while perpetuating color-blindness and racism.⁶⁶ The argument to "preserve" indigenous languages appears to advocate for indigenous rights while also denying them adequate educational resources, training and educational opportunities to learn English.

⁶² "English is important in order to provide more opportunities to the students."

⁶³ "We lack educational materials in general, so I don't have much confidence that we are going to receive more support from the state."

⁶⁴ "Peru Commits to Bilingualism with a New Focus on English."

⁶⁵ "The Intercultural Bilingual [Education] Plan is not going to affect Taquile, because it is only goals for education."

⁶⁶ Ryuko Kubota, "The Multi/Plural Turn, Postcolonial Theory, and Neoliberal Multiculturalism: Complicities and Implications for Applied Linguistics," *Applied Linguistics* 37, no. 4 (August 2016): 474-494.

INSTITUTIONALIZATION OF QUECHUA TAKES AWAY LOCAL MEANINGS

As mentioned before, the Bilingual Education Program for indigenous peoples is a “one size fits all” program. Every rural, indigenous school has received the same state-sponsored books and curriculum and many of the teachers have been trained in the same programs to teach Quechua. This education format not only limits opportunities for the people of Taquile, the institutionalization of their language takes away its local meanings and importance. This education program has not accounted for differences that exist between indigenous groups of Peru; even among indigenous peoples who speak Quechua there is differences in pronunciation, word choice, and cultural associations with specific words.⁶⁷ Teaching Quechua without the context of their culture or history limits the opportunity for larger cultural awareness and better performance. The Peruvian Nation wants to use Quechua as a national identifier and this homogenizes indigenous peoples who speak Quechua into one group; in reality, there is great diversity among indigenous groups, even among those in the Lake Titicaca Basin. For example, the Uros people live an hour away from Taquile by boat and are different from Taquileños for a number of reasons. They live on floating reed islands that are constructed by hand, come from different histories, and speak Aymara, a language sharing similarities but overall linguistically different than Quechua.

Why are cultural differences not accounted for in formal education policies in Peru? The answer is actually fairly simple: the great majority of individuals in the Ministry of Education and in the government who make decisions about Quechua in schools are *not indigenous* and do not have any connection to its linguistic community.⁶⁸ Not only is this true on an administrative level, but even the professors at Taquile’s school are not indigenous; every

⁶⁷ Rowe.

⁶⁸ Bruce Mannheim, “Una Nación Acorralada: Southern Peruvian Quechua Language Planning and Politics in Historical Perspective,” *Language in Society* 13, no. 3 (1984): 291–309.

two years new professors are selected from the nearby city of Puno and come to teach at Taquile. Many Taquileños do not have the money to afford a university degree which is required to be a teacher in Peru. Therefore, there are no indigenous teachers on Taquile. Additionally, the director is also from Puno and although the faculty at Taquile have good intentions for providing a quality education, as outsiders they do not completely understand the community and therefore are teaching Quechua outside of its cultural context.

In the Intercultural Bilingual Education Plan, it actually mentions indigenous peoples as an important part of this new education program. In the definition of the program it mentions, “[EIB] es un espacio que promueve la participación de docentes, estudiantes, padres de familia y líderes comunales en los procesos educativos.”^{69,70} However, in the case of Taquile, we can see that no local families or leaders have been involved in the creation or implementation of these educational programs in Quechua.

As previously described, indigenous languages were not valued and stigma surrounding indigenous knowledge still exists today. The curriculum created by the Ministry of Education teaches the language of Quechua, but is taught in a way that does not value Pre-Incan histories, which is similar to Spanish education systems that also did not value indigenous histories. All of the textbooks used at Taquile are all written by the Ministry of Education, and after reading each one from the classes I attended, it is easy to see that these books are promoting National Peruvian identities and ideologies. I asked my host father how he learns about Taquileño history and he said, “No he aprendido sobre la isla de la escuela. Aprendí de mis padres y de los libros. En la escuela es solamente sobre historia nacional de Perú.”⁷¹ School textbooks can reveal state-sponsored concepts of nationhood and be windows into

⁶⁹ “[Intercultural Bilingual Education] is a space that promotes the participation of teachers, students, parents, and community leaders in the educational processes.”

⁷⁰ Ercco.

⁷¹ “I have not learned about the island from the school. I learned from my parents and from books. In the school it is only about national history of Peru.”

understanding desired national identities.⁷² For example, in a social studies textbook from Taquile, there are maps showing indigenous groups where different languages are spoken. These types of maps and short descriptions about general indigenous groups in Peru are the extent to which these books talk about indigenous peoples. The history textbook focused solely on Incan history, Spanish colonization, and Peruvian independence. By exclusively teaching Incan history and nothing about Pre-Incan communities, the school of Taquile is teaching an education that homogenizes indigenous peoples into a single history. This is in the interest of the Nation, because their goals are to create a national identity centered around indigeneity. In essence, the Peruvian nation is attempting to re-establish a unified Incan Empire and teach an exclusively homogenous, Incan history that is directly connected to Peruvian independence.

The writing systems taught at Taquile's schools are actually very different from how Taquileños actually speak with each other. Quechua was historically an oral language, and the alphabet that is used today was created by missionaries who were not interested in regional differences of dialect and pronunciation.⁷³ The language has also changed a great deal; the people of Taquile have adapted Spanish words into their language in order to be more flexible in a Spanish-dominated society. Quechua traditionally was an oral language and not until Spanish missionaries co-opted the language was it written. Literacy is defined in a Western and colonial perspective in Peru; the way that indigenous peoples read and write is largely dictated by formal education and takes on educational forms that were implemented by the Spaniards.⁷⁴ The Ministry of Education's standardized writing system makes it difficult for local differences to be accurately represented.

⁷² Matthias vom Hau, "Unpacking the School: Textbooks, Teachers, and the Construction of Nationhood in Mexico, Argentina, and Peru," *Latin American Research Review* 44, no. 3 (2009): 127–54.

⁷³ Von.

⁷⁴ Peter C. Browning, "The Problem of Defining 'Indigenous Literacy': Lessons from the Andes/El Problema De La Definición De 'Alfabetización Indígena,'" *Íkala; Medellín* 21, no. 3 (2016): 301–12.

I attended five different academic classes, and I asked each teacher if their students could write in Quechua. Every professor said, yes, they could. I then asked the students if they could spell a word for me in Quechua or write something down, and almost every student would say they could not write anything or only very little in the language. I thought this difference in opinion was peculiar and asked my host dad about it. He said, “*Más o menos diez por ciento puede escribir en Quechua en la isla, es difícil para escribir en Quechua.*”⁷⁵

The inability, or possibly disinterest, of many Taquileños to learn to write in the language shows that, culturally, they do not see writing in Quechua as an important part of daily life. This comes as no surprise to me as the written language does not mimic the way Taquileños speak, it does not represent their history, and they have had no say in its implementation.

CONCLUSION

Structures like these mandatory education programs and historical constructions influence the way indigenous peoples experience Quechua; however, they are not passive actors in the definition of their language. Despite the Peruvian Nation’s goals for Quechua, Taquileños have their own interpretations of the language, create personal definitions that are meaningful to the community, and uniquely define how Quechua is important to their identity formation.

My research can be used as a framework to understand how language education might function in a rural, indigenous community in Peru, but it is not an example of all indigenous experiences—not even all indigenous communities in the Lake Titicaca Basin. The education of the indigenous peoples of Taquile in Quechua could be beneficial if they were given autonomy and the ability to choose how education in Quechua was implemented in their schools. If these peoples were included in decision-making at the Ministry of Education, were able to gain degrees to be

⁷⁵ “More or less, ten percent can write in Quechua on the island, it is difficult to write in Quechua.”

teachers at Taquile, or felt empowered to be involved, only then should Quechua be implemented in their schools. If Taquileños decided that education in Quechua was relevant, then they could implement educational content that celebrated their identity, was culturally relevant, and that also prepared them to be successful and have self-sufficiency to advocate for themselves in our globalized and national world.

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Cow Mask
by Ruby Shearon

Crafting the World Class College in an Unequal World: A Case Study of Higher Education Internationalization Discourse

Abstract:

The internationalization of higher education (IoHE) is often heralded as a positive adaptation to the pressures of globalization and is comprised of measures—e.g. international student recruitment, study abroad, institutional partnerships—that connect higher education institutions (HEIs) across national borders. In pursuing IoHE, HEIs and individual actors draw on IoHE discourses—established yet evolving ways of constructing IoHE—to represent it as a beneficial and desirable objective in policy, marketing, and practice. However, such dominant framing obscures the variety of ways in which internationalization workers decode, articulate, and implement internationalization in different parts of the world. This review article charts a path for critically analyzing the ideologies represented and discourses used by higher education professionals in pursuing and promoting IoHE. To situate IoHE as relevant to global power relations, I synthesize theories of discourse and global academic stratification into a guiding theoretical framework. I present typologies of competing internationalization worldviews, rationales, and ideologies as a conceptual approach for analysis. To contextualize my own research at Warren Wilson College, I review prior micro-level studies on internationalization discourses. In closing, I introduce the focus of my research, synthesize reviewed theories into an applied analytical framework, and present an overview of my initial findings.

Bobby Trice | Sociology / Anthropology



Bobby Trice will graduate with a BA in Sociology/Anthropology and Social Work and a minor in Global Studies in 2019. His thesis is inspired by his love for higher education and local-global social scientific analyses. Over the summer, Bobby spent two months in Indonesia conducting follow-up research and has since finished a second manuscript for publication with his mentor, Dr. Siti Kusujarti. Obsessed with knowledge and critical social theory, he will likely end up in academia one day. Until then, he hopes to find some peace and fulfillment working with communities to advance justice and well-being for all.

INTRODUCTION AND LITERATURE REVIEW

Internationalization, Discourse, and Symbolic Capital

On a global scale, the United States and other postindustrial, democratic societies like the UK, Canada, Australia, and many European countries are encompassed by the idea of the West. By extension, the notion of Western academia constitutes much of higher education in these nations. Utilizing discourses, these societies construct their subjectivities and collectivities in terms of opposition, elevation and difference vis-a-vis the generalized non-Western racial/ethnic, cultural, and academic Other (Hall 1996; Said 1979). Similarly, this pattern of subjectification extends to the idea of Western academia and Western academics (Gerhards et al. 2018; Kostrykina et al. 2017; Stein 2016).

In his article “The West and the Rest: Discourse and Power,” Stuart Hall (1996) traces the historical trajectory of ideas through which the West claimed a superior position in the modern world order. According to Hall (1996), this history is contained in a discursive archive of classical knowledge, biblical and religious sources, mythologies, and travellers’ tales (206-207). These discursive sources cohere to form a naturalized, shared system of interpreting, representing, and relating to the Other (Hall 1996:206-207). Western agents draw upon this archive to conceive of themselves as superior, modern, normal, and moral in opposition to locales and locals they understand and thereby construct as inferior, ancient, exotic, and/or dangerous. Thus, the collectively imagined modern superiority of the West and Western institutions is maintained only through contrast to the stereotyped, non-Western Other discursively relegated to a stationary position in history (Hall 1996).

“The West and the Rest” is a discourse (Hall 1996). Following Foucault (1972), Said (1979), and Hall (1996), a discourse is a way of thinking about or representing a specifically defined and constructed body of knowledge on a particular topic (i.e. higher education internationalization). It comprises words, statements, and ideas, symbols and signs that fit together to create a seemingly naturalized, internally consistent representation

of that topic or of the world more broadly (Fairclough 2013; Foucault 1972; Hall 1996:201). Discourse limits and influences how people can conceptualize a topic, like one's position in the world or the impacts of internationalization. Because they have become increasingly globally engaged through internationalization, colleges, universities, and academic actors are significantly implicated as potential channels for the reproduction of Western dominant discourses of academia and the Other (see Dixon 2006; Hebert and Abdi 2012; Jiang 2008; Kostyrykina et al. 2017; Stein 2016).

However, in his theory of encoding and decoding discourse, Hall (1973) avoids implying discursive determinism and includes oppositional and negotiated decoding(s) of discourse. In oppositional decoding, individuals oppose or reject the dominant encoded meanings of discourse and thereby destabilize the strong influence of their messages. On the other hand, in negotiated decoding, individuals accept some and reject other pieces of the dominant discourse. Taken together, discourse and decoding are significant because they indicate that conceptualizations of higher education internationalization directly bear on why the process of internationalization is pursued, how it is implemented, how its outcomes are constructed, and how it is evaluated both practically and ethically; however, they also indicate that while the dominance of discourse(s) may be a strong influence on how a topic like internationalization is constructed, cultural actors in higher education institutions—as both audience members and actors vis-a-vis internationalization discourses—may interpret the dominant discourses of internationalization in a variety of ways, ranging from the unquestioning to the hypercritical (Hall 1973, 1996). Thus, internationalization workers have agency—often shaped by discourse(s)—to play an active role in the interpretation and production of internationalization discourses and practice in the context of their institution's culture and material limitations. Discourse and encoding/decoding are useful conceptual tools for analyzing internationalization; moreover, their use as such is enhanced when foregrounded in the larger context of global inequality.

Notions of Western superiority permeating global perceptions of higher education are undergirded by Western powers' historical expropriation, exploitation, and coercive economic integration of non-Western societies (Hall 1996; Stein 2016; Wallerstein 2004, 2011). Immanuel Wallerstein developed world systems theory in charting the processes of imperialism, colonialism, globalization, and the simultaneous creation of a tiered world order comprising core, semi-periphery, and periphery countries. In Wallerstein's theory, core countries such as the US and the UK extract resources from peripheral countries like Cambodia and Nigeria for economic and political gain. This model of core and peripheral countries is analogous to Hall's theory of "The West and the Rest" (1996). Wallerstein (2004, 2011) focuses on unequal material relations while Hall (1996) explicates the ideological mechanisms reproducing assumptions of Western dominance. Taken together, these theories provide a fuller view of the mutually reinforcing material and discursive power relations between the West and Rest implicated in higher education and other institutions (Hall 1996; Wallerstein 2004, 2011).

Bridging the gap between discourse, world systems, and the academic field, scholars have conceptualized a global academic system (Gerhards, Hans, and Drewski 2018; Marginson 2006, 2008; Munch 2014). Drawing on Bourdieu's (1986, 1988) explications of the academic field and forms of capital, these scholars suggest that symbolic capital—prestige and legitimacy within a given field—is unevenly distributed to institutions and actors in the global academic system following the core-periphery/West-Rest pattern (Gerhards et al. 2018; Marginson 2006, 2008; Munch 2014). Various indicators such as the uneven geopolitical distribution of publications, citations, translations, prestigious academic awards, and high global university ranking systems like QS Top Universities (QSTU) and Times Higher Education (THE) suggest a global academic system stratified by symbolic capital (Gerhards et al. 2018; Jiang 2008; Rust and Kim 2014). For example, of the top fifty universities ranked by QSTU, only twelve are in non-Western locales (QSTU 2017). In THE's top fifty, this number drops to only five non-Western institutions of higher education (THE 2017).

These ranking systems measure institutions' academic excellence and degree of internationalization (QSTU 2017; Rust and Kim 2014; THE 2017). In the age of higher education internationalization, the quality of internationalism itself has become a source of symbolic capital for institutions and actors, and it is commonly taken as a marker of academic excellence (Bassaran and Olson 2017; Knight 2010). As a result, within the context of the global knowledge economy and the push for internationalization, these ranking systems act as mechanisms of hierarchizing academia that reproduce the "The West and the Rest" discourse (Hall 1996; Jiang 2008; Kostrykina et al. 2017; Yang 2002). Consequently, non-Western institutions and actors of higher education are pressured to integrate into the modern global academic system through internationalization in order to climb the rankings and compete on par with Western institutions in the uneven global market of higher education (Kim and Rust 2014; Kostrykina et al. 2017; Munch 2014; Stein 2016). However, due to the consolidation of power and symbolic capital in the academic core, the academic semi-periphery and periphery are disadvantaged in this project (Gerhards et al. 2018; Munch 2014).

Within the theoretical framework sketched above, discourse and symbolic capital become relevant analytical tools for parsing policy, practice, and perceptions of higher education internationalization in the context of the global academic system (Bourdieu 1986, 1988; Gerhards et al. 2018; Hall 1996). Utilizing these tools entails uncovering the relationship between internationalization discourses and institutional/individual symbolic capital; moreover, it involves interrogating what internationalization means, what it is, why it should be pursued, who it serves, and what impacts it has on the global academic system.

Internationalization Today

Internationalization is not a new phenomenon. Since the 1980s, a massive proliferation of research, discussion, and debate on the internationalization of higher education has taken place, with scholars vying for an ever-better definition, conceptual

framework, operational approach, and philosophy of international higher education (e.g. Altbach 2004; de Wit and Knight 1995, 1997; Kilick 2016; Knight 2003, 2004, 2013, 2015; Knight and Altbach 2007; Larsen 2016; Yang 2002; Zeleza 2012). Jane Knight's (2003) traditional definition of internationalization is crafted to be dynamic, flexible, and broad enough to encompass the process while allowing room for local motivations, interpretations, and applications to inform her definition in practice (2003:2). However, due to its ambiguity, this definition has been used to maintain the normative assumption of IoHE's beneficiality without incorporating its risks and implications for the global academic system (Altbach 2004; Knight 2014). In keeping with scholarly critiques (Kostyrykina et al. 2017; Yang 2002; Zeleza 2012), Jane Knight (2014) has since declared that internationalization is becoming a catch-all buzzword distanced from its initial goals (Stein et al. 2016a). She contends that definitions of internationalization need to be grounded by a common set of fundamental values so as to avoid misuse or exploitation of IoHE rhetorics and discourses. She writes that the set of values motivating internationalization has changed from "cooperation, partnership, exchange, mutual benefits and capacity building to one that is increasingly characterised by competition, commercialisation, self-interest and status building" (Knight 2014:75).

In contrast, Yang (2002) argues that developing a universal definition of internationalization is incredibly challenging due to differing perspectives on the process and contexts in which it is defined and addressed. Yang notes that "definitions of internationalization embody diverse emphases and various approaches" (2002:82). For example, higher education organizations tend to approach the definition of internationalization differently: the European Association of International Education calls it "the whole range of processes by which education becomes less national and more internationally oriented"; the Association of Universities and Colleges of Canada (AUCC) dubbed it "a multitude of activities aimed at providing an educational experience within an environment that truly integrates a global perspective"; and among OECD members, it is sometimes

commonly conceived as “learning the language, social system, and broader culture of another European country” (2002:83). Each of these definitions indicates a particular orientation to or modified reflection of internationalization. Evidently, conceptualizations of internationalization vary by the position and nature of the institution producing the definition (Yang 2002).

As highlighted by De Wit & Knight (1995) and Yang (2002), conceptualizations of internationalization shape its implementation strategies (e.g. international student recruitment) and how they are prioritized. These scholars introduce core areas of internationalization such as international student and faculty recruitment and international collaboration that are prioritized according to institutional contexts. Within American internationalization discourses, comprehensive internationalization is a more recent broad conceptual model for internationalization (see Hudzik 2011, 2014). To illustrate, the Center for Internationalization and Global Engagement of the American Council on Education (ACE) has developed a common comprehensive model for internationalization (CIGE 2016). Moreover, Warren Wilson has adopted this model in planning and pursuing institutional internationalization. CIGE defines comprehensive internationalization as “a strategic, coordinated process that seeks to align and integrate policies, programs, and initiatives to position colleges and universities as more globally oriented and internationally connected institutions” (2016). CIGE elaborates its definition, breaking down internationalization into six target areas: (1) institutional commitment; (2) leadership and structure; (3) curriculum, co-curriculum and learning outcomes; (4) faculty policies and practices; (5) student mobility; and (6) collaboration and partnerships.

As illustrated by Knight’s (2014) concern about the rationales driving the process of IoHE, rationales for pursuing internationalization are variable and have emerged historically. De Wit and Knight (1997) and De Wit (2002) note four rationale categories for internationalization: (1) academic, (2) social or cultural, (3) political, and (4) economic. De Wit (2002) historicizes these rationales, showing a gradual progression from academic/

cultural valuations of IoHE to more political and economic motivations. Academic/cultural rationales for internationalization are associated with the historical roots of the university, exemplified by the wandering, Latin-speaking scholar of the Medieval period seeking new knowledge of the world. During colonial expansion and with the rise of the nation state, political rationales for internationalization emerged first as a means of domination—i.e. export and control of educational institutions in colonized locales—and second as a mode of building peace and mutual understanding between nations. Finally, De Wit (2002) notes that the emphasis shifted to economic rationales in the post-Cold War era, drawing on an instrumental discourse that prioritizes the needs of the “modern, more global labor force,” joint research endeavors that boost technological-economic competitiveness, and the market commodification of higher education (16). Increasingly, institutions use internationalization discourses in marketing to generate symbolic capital which attracts revenue from students, donors, and organizations, thereby producing economic capital (Bourdieu 1986, 1988; Gerhards et al. 2018; Stier and Borjesson 2010). This practice validates Knight’s (2014) concern with shifting rationales for internationalization that may serve to perpetuate the stratification of the global academic system (Munch 2014).

Building on De Wit’s (2002) typology, yet focusing on contemporary rationales as opposed to their historical trajectories, Knight (2004:21) contends that further differentiation of priorities between national and institutional levels is warranted. Knight maps extant rationales within the four categories and charts the emergence of national and institutional rationales for internationalization. Knight’s exploration of national vs. institutional internationalization rationales demonstrates how these positions—nation and institution—influence the development of differentiated yet correlated rationales and showcases how HEIs may be aligned with national interests (2004). Five core rationales emerge in each arena, national and institutional. These sets of rationales overlap in many areas. The clearest example is the strategic alliance rationale, a rationale fitting both levels of organization because universities and the nation alike benefit from

the economic advantages that come with international educational partnerships. At the national level, human resource development subsumes student and staff development just as national commercial trade subsumes institutional income generation as macro and mezzo manifestations of each rationale, respectively (Knight 2004).

Knight (2004) importantly reveals how new commercial and nation-centric rationales emerge beneath the veneer of idealistic rationales. Her work foreshadows critiques of financially motivated neoliberal internationalization by illustrating how HEIs are increasingly driven by commercialism and aligned with the interests of nations while continuing to espouse values of international collaboration (Knight 2004, 2014). The use of idealistic cultural rationales and academic arguments for IoHE has the potential to veil and thereby naturalize the underlying nation-centric economic and political motivations that scholars have examined as drivers of internationalization (Altbach and Knight, 2007; Dixon 2006; Stein 2016). Within such a welter of social forces and institutions, it is prudent to develop a critical perspective of internationalization that highlights the implications of IoHE discourses. In the following section, I connect my discussion of internationalization discourses and rationales to critical theoretical perspectives of IoHE (Hebert and Abdi 2012). These perspectives clash, yet their variety exposes and challenges normative discourses that posit internationalization as a solely beneficial process without inequitable implications for the global academic system (Gerhards et al. 2018; Hebert and Abdi 2012).

Competing Perspectives on the Internationalization of Higher Education

Hebert and Abdi (2012) outline a framework of approaches to understanding IoHE from a more critical perspective: world culture, world systems, postcolonial theory, and culturalism. Furthermore, Stein et al. (2016a) provide an analysis of IoHE discourse articulations that illustrate these categories by advancing from the premise of the modern/colonial imaginary, which constructs notions of racial and international hierarchy favoring

Western states and actors. This premise is encapsulated in Hall's analysis of "The West and the Rest" discourse and his notion of the discursive archive (1996). Stein et al. opine, "Today's iteration of the enduring modern/colonial imaginary continues to support capitalist social relations, to normalize liberal Western notions of politics and governance, and to naturalize a racialized hierarchy of existence" (2016a:3). While acknowledging how this imaginary has been contested, the authors write that it has maintained its hegemony through "consent, coercion, and brute force" (Stein et al. 2016a:3). Moreover, they locate each of their identified discourse articulations, and by extension, each of Hebert and Abdi's (2012) theoretical approaches to IoHE in terms of how each supports and/or subverts the modern/colonial imaginary. In the rest of this section, I outline each of the four theoretical perspectives noted by Hebert and Abdi (2012) and illustrate them using examples of IoHE discourse articulations Stein et al. have analyzed in IoHE policy and programs (2016a).

World culture is the first IoHE perspective forwarded by Hebert and Abdi (2012). World culture approaches are characterized by their view of IoHE as a force of convergence giving rise to a unified global society as evidenced by the mass adoption of idealized Western models of higher education. However, this approach tends to assume a unilateral alignment of several differentially positioned political and socio-cultural actors and results in the hegemonic production of consensus (Hebert and Abdi 2012; Stein et al. 2016a). As evidenced by critiques stemming from the other three views, this consensus and convergence of cultures is an illusionary product of the West's hegemony over the global cultural political economy that deauthorizes dissent or resistance to the imposition of Western academic orthodoxy through the global academic system (Gerhards et al. 2018; Robertson and Dale 2015).

A large proportion of popular IoHE rationales fall into this ethnocentric, idealizing and totalizing theoretical approach. For example, Stein et al. (2016a) point to a common discourse of "internationalization as global public good," which stresses increased access to higher education and emphasizes how it

can benefit a constructed “global public” without attending to the stratification within it (Stein et al. 2016a:6). While this articulation allows for critiques of neoliberal economic approaches to IoHE, it still serves to perpetuate a global hierarchy by leaving dominant institutions and forms of knowledge governing IoHE unproblematized. Simultaneously, it uncritically advocates for increased access to these potentially neocolonial systems, and thus represents a normative world culture approach to IoHE (Hebert and Abdi 2012; Stein et al. 2016).

A second approach is the world systems paradigm introduced by Wallerstein (2004, 2011) and applied to academia and internationalization by various scholars discussed earlier (e.g. Gerhards et al. 2018; Hebert and Abdi 2012; Marginson 2006, 2008; Munch 2014;). According to world system theorists, globalization and the knowledge economy have given rise to increasingly narrow, economically motivated approaches to IoHE that focus on maximizing profit especially through international student recruitment (Jiang 2008; Kostrykina et al. 2017; Robertson 2009; Stein 2016). These mobile students, often from non-Western locales, typically pay high or full tuition fees and may stay in Western labor markets, contributing to the growth of Western HEIs and economies. This trend is known as brain drain, wherein core countries extract talented students and future workers from semi-peripheral and peripheral nations.

A world systems approach has the potential to foreground the unidirectionality of IoHE flows from the core to the semi-periphery and periphery—HEIs, models, standards, conventions, the English language—and student revenue, international prestige, and brain drain from the semi-periphery and periphery to the core (Basaran and Olsson 2018; Gerhards et al. 2018; Kostrykina et al. 2017). While this perspective can be used to analyze the concrete implications of IoHE in terms of the stratified global academic system, it can also be deployed normatively to suggest IoHE as materially beneficial to the world economic system (Hebert and Abdi 2012). To illustrate, Stein et al. forward an uncritical world systems IoHE articulation: “internationalization for a global knowledge economy” (2016a). This discourse fits an

uncritical, normative world systems approach in positing IoHE as a driver of knowledge-economic development and a tool for educating, innovating, and producing competitive labor forces in the global economy. In doing so, it values Western knowledge and authorizes a view of other places as having inferior “knowledge capital” necessary for development in the contemporary knowledge economy (Stein et al. 2016a:5).

Two more overlapping views of IoHE are postcolonialism and culturalism. Postcolonialism closely aligns with my own theoretical orientation toward analyzing IoHE as it “views globalization as the imposition of the economic and political agendas of major world powers on the global society so as to benefit rich, wealthy nations and corporations to the detriment of the world’s poor” (Hebert and Abdi 2012:6). This perspective criticizes the Western hegemony of IoHE as a neocolonial force that serves to perpetuate global power relations, primarily through the neoliberalization of higher education and the preeminence of the modern/colonial imaginary. It advocates for decolonizing and liberating higher education from Western or otherwise dominating influences, and suggests critical readings of history and the relations between parts of the world as a necessary component of reforming higher education and IoHE broadly. In an overlapping work, Stein (2016) develops decolonial critiques of internationalization, a set of critical views comprising an ideological perspective I refer to as decolonialism. Aligning with postcolonialism, decolonialism focuses on issues of commodification, tokenism, and power imbalances in internationalization and global context (Stein 2016). Furthermore, “anti-oppressive internationalization” is a subversive IoHE discourse articulation identified by Stein et al. (2016a) that fits into a postcolonial/decolonial perspective. It is defined by its dedication to effect lasting social change through global solidarity, collaborative resistance, and the pursuit of a more equitable status quo while pursuing IoHE. In explaining this articulation, Stein et al. (2016a) forward a myriad of critical literature on both discourses of IoHE for the global knowledge economy and as global public good. They cite the destructive influence of Western domination—i.e. the reinforcement of Western superiority—in IoHE measures like

study abroad; moreover, they critique IoHE institutions, including global ranking systems and international higher education organizations, that reproduce and reinforce discourses built upon “Eurocentric universalisms” (Stein et al. 2016a:8). The decolonial anti-oppressive articulation is exemplified by a trend of higher education decolonization movements, wherein mobilized groups of students and academics have called for rethinking and reclaiming higher education from the colonial consequences of domination and hierarchized racialization endemic to hegemonic, Western IoHE discourses and practices (GlobalHigherEd 2011; Pashby and Andreotti 2016; Stein et al. 2016a, 2016b; Wildavsky 2011).

The last perspective, culturalism, is preoccupied with progressive educational ideas that might destabilize the hegemony of Western knowledge in IoHE such as Freirean views and social justice education (Hebert and Abdi 2012). The culturalists recognize multiple, if conflicting, forms of knowledge circulating through the local-global nexus. Advancing from similar premises as postcolonialism, culturalism places more weight on understanding IoHE as a field of contested knowledge and questions the modern/colonial imaginary. Culturalism attends to the narratives of Others in attempts “to recognize and discover distinctive threads of human cultural thought and experience” (Hebert and Abdi 2012:8-9). My theoretical orientation aligns with postcolonialism and culturalism due to my interest in individual discourses, narratives, and alternative forms of knowledge—an approach largely absent from investigations of IoHE in Western contexts.

Culturalism is exemplified by the articulation of IoHE discourse Stein et al. call “relational translocalism” (2016a). This articulation stretches the limits of intelligibility “within the logics of mainstream capitalism, Westphalian nation-states, and Cartesian forms of subjectivity—that is, what is possible within the modern/colonial imaginary” (Stein et al. 2016a: 8). It does this by furthering anti-oppressive premises that recognize patterned relations of exploitation between The West and the Rest but centering individuals’ positions and complicity in these patterns. In doing so, relational translocalism emphasizes the proactive recognition and redress of a harmful modern/colonial imaginary

and material world order that “enabl[es] prosperity and safety for some at the expense of others who are subjected to austerity and violence” (Stein et al. 2016a:9). This articulation of radically reimagined and reconceptualized IoHE is incredibly speculative, but it provides a useful analytical tool for examining whether and how individuals locate themselves and their actions vis-a-vis the negative implications of IoHE.

Fitting into these competing perspectives, Yang (2002) posits three views of the international(ized) university: as a site of (1) convergence, (2) conflict, and/or (3) contestation or negotiation, parallel to Hall’s (1973) three types of decoding: dominant-hegemonic, oppositional, and negotiated. The first view of the university is connected to the world culture theoretical perspective because it assumes that IoHE—as a process of convergence and connection for an imagined global academic community—is evenly beneficial to all players in the global academic system. The second view of the university represents the postcolonial and world system perspectives as it suggests that there is conflict between Western impositions of imperialistic forms of knowledge on peripheralized locales and the local values, traditions, and institutions of knowledge. The third view of the university—as a site of contestation or negotiation—reflects the postcolonial and culturalism perspectives, positing the international university as a site where global and local knowledges intersect, cross-fertilize, and battle each other in negotiating representations of “different worlds in different ways” (Yang 2002:85). At the individual level, these perspectives may be analyzed using Hall’s (1973) theory of decoding discourse. Informed by subject-positions within relations of power, these perspectives represent (1) a dominant-hegemonic decoding and conceptualizing of higher education projected by the West, (2) an oppositional decoding and discourse of resistance to the neocolonialism of internationalization and global higher education, and (3) a hybrid perspective or negotiated decoding comprising both fragments of and tensions between the first two views (Hall 1973; Yang, 2002). Following Yang (2002), I tend to locate my own work in the second and third views of the university because they are critical of the dominant convergence perspective

and align with my conceptual orientation to the global academic system.

In a synthetic analysis of IoHE power relations based in Yang's (2002) view of the university as a site of negotiation, Kostrykina et al. (2017) expand critiques of knowledge economy rationales for IoHE but in the context of "The West and the Rest" discourse (Hall 1996; Hebert and Abdi 2012; Jiang 2008; Stein et al. 2016a). They argue that the Western underpinnings of global knowledge paradigms must be centered and acknowledged in IoHE research and practice so that the global ramifications of (Western) dominant IoHE discourses may be recognized and addressed. Kostrykina et al. contend that this central understanding of Western dominating influences in IoHE discourses lends itself to localized analyses of contested IoHE (especially) in non-Western locales and by non-Western actors (2017:7-8). In their analysis, the "game" of IoHE—regulated by Western hegemony over the knowledge economy and forces of globalization—becomes an arena for negotiating the "rules" of IoHE in localized contexts, allowing for the subversive modification of Western knowledge paradigms pertaining to higher education (Hebert and Abdi 2012; Kostrykina et al. 2017). This study is particularly significant because it provides insight into the practical, on-the-ground negotiation of power relations between The West and the Rest in the context of IoHE (Hall 1996; Kostrykina et al. 2017). This insight paints a picture of the Rest not as passive recipients, nor as victims of Westernization, but as active agents fully capable of understanding, contesting, and negotiating the Western hegemony of IoHE discourses (Hall 1973; Kostrykina et al. 2017).

Having forwarded a number of critical approaches to understanding how IoHE discourses are implicated in the (re) production of uneven global power relations, I now turn to literatures on the IoHE discourses of institutions and individuals. Foregrounding the language of IoHE in my analysis against the background of globalization, the knowledge economy, and exploitative historical and economic relationships between The West and the Rest, I will demonstrate the significance of tensions in IoHE discourses; moreover, I will show how institutions

draw upon and contribute to IoHE discourses in mediating disharmonies between, for example, the global commodification of knowledge and higher education and the purported values of cosmopolitanism, democracy, and social justice that predominate in HEIs, including Warren Wilson College.

Analyzing Institutional Internationalization Discourses

Scholars have produced a multitude of approaches to the analyses of internationalization discourses in institutional policy, media, and academic discourse (e.g. Kostyrykina et al. 2017; Stein et al. 2016a; Stier 2004, 2010; Stier and Borjesson 2010). Jonas Stier (2004) is renowned for his typology of internationalization ideologies that draws on prior broad categorizations of IoHE rationales (de Wit 2002; Knight 2004; Knight and de Wit 1997). Stier develops characterizations of three ideological frames used in the institutional discourses of IoHE policy and practice: (1) idealism, (2) instrumentalism, and (3) educationalism.

Idealism—the normative ideology of internationalization—is built on the preconception that IoHE is a beneficial process that fosters international interconnectedness and cooperation, creating “a more democratic, fair, and equal world” (Stier 2004:88). In traditional typologies of IoHE rationales, idealism would be considered a social/cultural and political discourse in supporting purportedly beneficial international programs and policies (de Wit 2002; Knight 2004; Knight and de Wit 1997). In his analysis, Stier traces the origins of idealism to universalism, a totalizing mode of knowing that posits knowledge as universal and objective. Following Bauman’s (2000) argument that globalization replaced universalism in modern discourses (as cited in Stier 2004), he illuminates how both the current ideology and its predecessor exemplify ideas that inculcate “a sense of world order” and thereby contribute to its creation. Idealism furthers these ideological premises by positing human capacity as a tool for improving the world through the project of modernity, egregiously overlooking how ideal visions of changing the world are rooted in different cultural contexts with different motivations and implications. Therefore, the discourse of idealism may be critiqued as a dominant

and ethnocentric discourse of the core/West that may victimize and subordinate the semi-periphery and periphery/rest due to its reliance on ideas about improving and thereby, in a sense, saving these hapless locales from being left out of modernity—the history of human progress (Stier 2004).

Instrumentalism, Stier's second ideology of IoHE, fits into the category of political and economic rationalism because it prioritizes the isomorphism of HEIs and academic orthodoxies as a means to homogenize, simplify, and integrate higher education into a globally connected system (2004). This bureaucratic rationalism is primarily concerned with higher education as a means to maximize profit by attracting student revenue, producing competitive laborers and mobile work forces, sustaining development and growth, and spreading ideologies of preeminent economic and political actors that may serve to advance other instrumental priorities (Stier 2004:89-91). Stier (2004) associates this ideology with policymakers and administrators, not faculty, who “are more reluctant [to support] or even oppose such a rationale for internationalizing higher education” (2004:90). In advancing the discourse of instrumentalism, the aforementioned key actors espouse support for a number of common values associated with HEIs: “life long learning, inclusive education, social competencies, critical thinking, and, last, but not least, intercultural understanding” (Stier 2004:90). These values are commonly deployed in IoHE discourses, but for instrumentalists, they are seen as target objectives meeting the needs of “the capitalist, global, and multicultural world” by providing relevant professional competencies that are widely sought in the world of employment, increasing economic competitiveness of institutions' graduates and thereby increasing the economic competitiveness of the institutions themselves (Stier 2004:90-91).

In keeping with critical world systems theorists, this discourse may be critiqued insofar as it legitimizes academia as a global marketplace commodity. In taking a rationalistic, neoliberal approach to higher education, instrumentalism blatantly supports the West's extraction of “academic staff and fee-paying students” in both a temporary and a more permanent way evidenced in the brain drain trend discussed earlier. Apart from these financial

incentives, Stier suggests that certain ideocultural goals also drive instrumentalism, including the imposition of ways of life and thought through projects, as in the supranational academic identity project accompanying the EU's approach to IoHE that may precipitate ideological homogenization and cultural normative regulation using the guise of supranational European community (2004:91). Instrumentalism, therefore, may be critiqued as a coercive discourse bent on the conflation of cultures, the collapse of many identities, and the homogenizing assimilation of HEIs into one totalizing system of standards (Stier 2004:91).

Stier's third ideology of IoHE is educationalism, defined by its expansive academic focus on the learning process that goes beyond "mere idealistic and professional aspirations of policy-makers" (2004:92). The discourse of educationalism posits IoHE as enriching to the learning process by stimulating learners with an entirely new cultural and educational context; moreover, educationalists—predominantly faculty—advance the notion that IoHE provides a multidimensional learning experience comprising reflection and the adoption of different points of view—educational opportunities that cultivate a purportedly deeper sense of intercultural understanding enmeshed with the learner's academic growth and development. Therefore, educationalists argue for IoHE as it facilitates "personal growth and self-actualization" (Stier 2004:92).

Stier outlines three critiques of educationalism. First, Stier analyzes its tendency toward "academicentrism," a kind of chauvinism that gives greater credence to Western ideas about how learning and education should be structured and administered to benefit the individual. Second, the educationalist perspective favors some disciplines with which it dovetails—i.e. social sciences—more than others—i.e. natural sciences and math. Third, educationalism may atomize cures to structural global issues by linking the benefits of IoHE to the self-actualization and personal growth of educated individuals.

Echoing his earlier work, Stier (2010) found that these common discourses of IoHE share overlapping yet distinct understandings of IoHE as a beneficial endeavor for varying

academic, cultural, political, and economic reasons. Moreover, he synthesizes a critique of these discourses' implications, highlighting their shared preoccupation with the form of higher education—e.g. models, standards, structured core areas, student body composition—as opposed to its content wherein subtle cultural biases may operate as modes of reproducing social inequality through exclusion and Western ethnocentric ideocultural framing in curricula and pedagogy (Stier 2010:339). This critique reflects the general lack of attention to curriculum, pedagogy, and culture in internationalization studies, and it demonstrates how prioritizing issues of academic structures, as opposed to academic content, advances instrumentalist rationales, sidelining efforts to improve these areas while simultaneously espousing their value (Stier 2010).

Stier and Borjesson (2010) conceptualize IoHE discourses in terms of how institutions and individuals use them to craft marketable self-representations of colleges and universities, writing:

Narratives produce the very events they reflect upon. Internationalization is both an empirical and analytical category *and* a rhetorical resource for actors. Internationalization is integral to the discourses in narratives on the demands knowledge society places upon its citizens and higher education systems. (Stier and Borjesson 2010:337; emphasis in original)

In this excerpt, these scholars frame the discourses of internationalization as producers of a social reality that higher education actors draw on to negotiate and respond to the conditions of economic globalization and the rise of the knowledge economy. This insight is key in guiding my own research into how actors at Warren Wilson draw on IoHE discourses to advance national, institutional, and personal interests through marketed representations of the college.

By analyzing policy and marketing materials, Stier and Borjesson (2010) elaborated a five-part typology of universities' self-representations of IoHE in discursive space. The authors link this phenomenon to the commoditization of higher education

and the global marketization of universities that compels HEIs to invest in branding, benchmarking, and distinguishing themselves from other institutions. This typology demonstrates how HEIs draw on and contribute to discourses of IoHE in a number of ways in service of pursuing economic competitiveness by, for example, positioning the internationalized university as (1) a catalyst, which signals HEIs as active drivers of knowledge production, economic growth, and world improvement; (2) a magnet, which emphasizes HEIs' ability to attract revenue-generating international students through their global visibility and distinctiveness; (3) a success story, which draws on narrative rhetoric convincing the audience of HEIs' effectiveness as catalysts and magnets while communicating an incessant need to improve IoHE efforts as a way to gain audience trust; (4) a moral stronghold, which aligns with an idealist ideology by presenting HEIs as productive bastions of social justice and forces that equalize the inequities of the stratified globe by spewing forth both their liberal principles and enlightened citizen graduates who espouse similar values; and/or (5) a melting pot which draws on uncritical ideas of multiculturalism as conducive to the learning environment and as an indicator of academic excellence, ultimately centering the individual and individual outcomes in an educationalist approach (Stier 2004, 2010; Stier and Borjesson 2010).

This analysis highlights how HEIs might draw on multiple, sometimes conflicting discourses of IoHE in crafting self-representations that, for example, advance economic goals without compromising idealist and educationalist values associated with HEIs in a rhetorical "harmonizing" of the dissonances therein (Stier and Borjesson 2010:349-350). In closing their article, the scholars synthesize their findings, writing:

Our analysis has revolved around the urge to harmonize potentially politically controversial dichotomies. This brings about a number of consensus narratives. The universities should be independent *and* useful for society, working both locally *and* globally, ensure tradition *and* looking toward the future, be a catalyst *and* a response to today's problems,

to be excellent (elitist) *and* an educational resources for the masses of people, etc. (Stier and Borjesson 2010:350; emphasis in original)

This characteristic of IoHE discourses is relevant to my research in that it exposes how hegemonic discourses of IoHE re-incorporate and neutralize tensions between interests in discourse by rhetorically harmonizing them—making them appear to cohere—and producing consensus (Stein et al. 2016a; Stier 2010; Stier and Boresson 2010). These key insights enrich my grounded analysis of how WWC discursively represents itself with symbolic capital—through marketing and internal messaging—in the arena of IoHE (Basaran and Olsson 2018; Stier and Borjesson 2010).

While the scholarship included here on traditional and critical approaches to IoHE discourses is essential to consider in conducting my own study and crafting my own critical analysis, these studies have largely excluded the individual voices of IoHE actors and their articulations of IoHE discourses, opting instead to focus on policy or representations of practice as a unit of discursive analysis (Knight 2004; Stein et al. 2016a; Stier and Borjesson 2010; Stier 2004, 2010). The following section builds on a minority of studies that include individuals in their qualitative investigation of IoHE discourses and seeks to relate prior work to my own research with individuals who may be implicated in the realm of IoHE at their institution, Warren Wilson College.

Studies of Individual Internationalization Discourse

While the aforementioned macro-level discourse analyses may be applicable in evaluating individual articulations of IoHE discourses, the following studies explicitly include and focus on how individuals think about and respond to IoHE and provide a deeper, nuanced look at how individuals draw on strains of IoHE discourse depending on their positioning, priorities, and the pressures they face. In this section, I present a few contrasting studies: Forstorp (2017), focuses on “what we talk about when we talk about internationalization” by conducting interviews with administrators and IoHE practitioners in Russia and Norway;

Gao (2015) presents qualitative results from interviews with administrators at flagship universities in Singapore, Australia, and China and finds that administrators generally shared constructs of IoHE with only minor contextual variations; Tian and Lu (2017) present striking evidence that IoHE creates tension for some agents, relaying how young Chinese lecturers are pressured to publish research in international journals, which detracts from their teaching and wellbeing; and Yang (2002) relays fieldwork indicating that Chinese faculty and HEI officials recognize the risks and consequences of IoHE, but find, as Kostrykina et al. (2017) put it, that the game is worth playing. Their rationalizations were often couched in the belief that the economic benefits Western-dominated IoHE provides outweigh the ramifications of Westernization due to the endurance of Chinese culture and national character (Yang 2002). These studies provide a range of findings that may serve as reference points in my own ethnographic study and discursive analysis.

Forstorp (2017) writes about the views of IoHE “missionaries,” administrators and international coordinators who interpret and mediate meanings of IoHE for the various constituencies with whom they interface in the process of internationalization. Forstorp’s work problematizes how IoHE is discursively animated by institutional actors as “a concept with multiple functions and meanings, serving needs and expectations at various institutional levels,” (2017:127). Forstorp (2017:134) interviewed senior administrative leaders and mid-level IoHE practitioners, concluding that official documents and leadership visions tend toward vague and abstract articulations of IoHE and its rationales, while practitioner perspectives arc toward defining IoHE in terms of concrete, specific activities, goals, outcomes, and conditions. The significance of Forstorp’s work lies in his examination of individual and institutional discourses of IoHE, rendering visible how IoHE is simultaneously a means to different ends, framed in different ways and engendering disparate interpretations. This work reflects theoretical developments in policy discourse studies that track how different articulations of IoHE advance different goals and may appear to integrate social

tensions into one resonant discourse while favoring dominant neoliberal interests and subordinating resistant or merely non-economic values of IoHE (Dixon 2006; Stier 2004, 2010).

Yuan Gao (2015) conducted a study focusing on how university administrators conceptualized internationalization as a shared construct across national and institutional borders. Finding considerable commonalities across nations and universities and congruence with the literature, Gao (2015) reports that informants shared academic excellence as their motivator for IoHE; moreover, Gao's work adds campus/organizational culture to the ever-expanding list of IoHE core areas. This is important because—like curriculum and pedagogy—campus culture vis-a-vis IoHE has not been given sufficient attention in IoHE literature nor in university discourses and practices (Stier 2010). This is problematic for HEIs in the U.S. and abroad. It creates an issue parallel to the diversity and inclusion dilemma, wherein diversity represents numerical representation by nationality/race/class/gender etc. and inclusion represents changing organizational culture to support the numerical diversity of the institution. A lack of attention to the academic and social/cultural needs of international students, for example, means an institution runs the risk of recruiting students without retaining them due to underservice and an unwelcoming environment. Finally, Gao (2015) acknowledges that a shared construct of IoHE is deployed contextually as impacted by local variables.

In contrast, taking the faculty perspective, Tian and Lu (2017) report how young Chinese lecturers are increasingly pressured to pursue research and publication as a part of a larger, coercive neoliberal IoHE agenda driven by global HEI ranking systems and market competition. These findings are congruent with Dixon's (2006) poststructuralist ethnographic work. Drawing on the storylines of policymakers and policy actors from Thailand and Australia, Dixon (2006) argues that naturalized neoliberal discourses have obscured the relationship between IoHE and globalization. While scholars have conceptualized these phenomena as oppositional, one reactive to the other, Dixon finds that IoHE may contribute to and exacerbate the negative aspects

of globalization—exploitation, academic hierarchization, global stratification (2006; Altbach 2004). Institutional actors, therefore, may draw upon certain elements of idealist and instrumentalist discourses to rationalize and harmonize—for themselves and others—the consequences of the work in which they are complicit (Dixon 2006). In an early study, Yang (2002) presents discourses of IoHE and then contrasts these views with the testimonies of Chinese faculty whom he interviewed. Unlike the work of Dixon (2006) and IoHE decolonization discourse, these faculty represented a glocal discourse of IoHE wherein they recognized the dominating influence of Westernization, yet rationalized its worth in terms of economic development and competition in higher education. They drew on notions of the distinctiveness and endurance of Chinese culture and national character to demonstrate how and why they were willing to tolerate Western hegemonic IoHE discourses and practices as it enabled their survival and advantage in the evolving world order (Yang 2002).

In reviewing several bodies of literature related to the IoHE in global, national, institutional, and individual contexts, I charted a course for my own research. Following discourse studies of IoHE literature, policies, ideology, institutional self-representation, social cartography, and as represented by HEI faculty and officials in varying global positions, I investigated the extent to which individual articulations of IoHE discourses in the context of

Warren Wilson College draw on dominant or divergent discourses in conceptualizing IoHE, their work, and their identity in relation to the structures—i.e. the institution, the nation—they navigate and thus influence. My objective was to analyze the implications of dominant IoHE discourses by examining rationales, ideologies, and their practical consequences through explorations of interviewees' articulation, interpretation, manipulation, evasion, and/or reinforcement of these discourses (Hall 1973, 1996).

PURPOSE OF THE STUDY¹

The purpose of my research was to investigate how internationalization is conceptualized and communicated at the individual level by key informants involved in internationalization efforts at WWC. The study was designed to examine this micro-level of internationalization discourses with a critical eye toward the dominance of some conceptualizations over others and the interests implicit in different discourses. I utilized a qualitative approach comprising critical discourse analysis and semi-structured interviews. I purposively sampled a number of key informants in faculty and administrative positions. After interviewing twenty informants, I applied discourse analysis procedures to transcriptions of the induced discourse derived from interviews (Fairclough 2013; Ruiz 2009). In this phase of qualitative research, I drew on conceptual tools to chart the emergence of different ideological discourses on internationalization (see above). I analyzed the relationships between discourses emerging in the data in terms of cohesion and consensus, contradiction and critique, and contestation or negotiation in line with Hall's (1973) theory of discursive encoding/decoding. Additionally, while this study has a critical bent, it will serve as a vehicle for the compilation of ideas and the amplification of voices pertaining to internationalization at Warren Wilson College. Finally, my research advances the internationalization research agenda through the examination of internationalization discourses and the application of key insights from the fields of sociology and international higher education studies to a new, unique context at Warren Wilson College, a small, progressive liberal arts school in the mountains of Western North Carolina near Asheville, NC.

FINDINGS

The (ideo)Logics of Internationalization Conceptualizations

In meeting with informants during interviews, my first point of inquiry was how participants conceptualized, defined,

¹ Note from editors: this section and the next are heavily abridged to meet the length requirement of our journal.

understood, and interpreted higher education internationalization at Warren Wilson. From a critical discourse analytical perspective, how individuals conceptualize and act upon information about a topic is strongly influenced by extant—usually dominant—discourses surrounding that topic (Hall 1996). Consequently, any topic—including internationalization—is not freely constructed (Hall 1996; Said 1979). Rather, suffused with discourses, conceptualizations of topical knowledge and their consequent implementations are alternatively constricted in some ways and enabled in others; however, this discursive influence is complicated by individuals’ agency in decoding internationalization discourses and acting upon their understandings of the topic (Hall 1973, 1996).

As my interviewees play an active role in constructing internationalization and putting it into practice, it is pertinent to analyze the ideological underpinnings of their statements and how they decode and (re)produce internationalization discourses. For this purpose, I utilize some of the conceptual tools compiled in the literature on internationalization (see above), namely two complementary theories, Hebert and Abdi’s (2012) competing perspectives on internationalization and Stier’s (2004) ideal typology of internationalization ideologies. Each broader perspective (Hebert and Abdi 2012) aligns with an ideal-typical ideology (Stier 2004), except for postcolonialism. I add decolonialism to Stier’s (2004) ideal typology by coupling an informant’s *in vivo* self-identification with the term “decolonial” and Stein’s (2016) compilation and development of decolonial critique (see also Stein et al. 2016a). I summarize the alignment between these theories and Hall’s (1973) theory of encoding/decoding messages in discourses in Table 1 (below). In conducting my discourse analysis, I utilize Hall’s (1973) theory to identify how ideologies and perspectives represented in interviewees’ statements are in conversation with the dominant discourse(s) of internationalization which are often centered around student exchange (Bolsmann and Miller 2008; Stein 2016; Stier 2004).

Type of Decoding Hall (1973)	Four Perspectives Herbert and Abdi (2012)	Ideal Typology of IoHE Ideology Stier (2004)
Dominant-hegemonic	World Culture	Idealism
Dominant-hegemonic	World Systems	Instrumentalism
Negotiated	Culturalism	Educationalism
Oppositional	Postcolonialism	Decolonialism

In conducting ideological discourse analysis of participants' concepts of internationalization, several themes emerged. Idealistic notions of internationalization were common across most interviewees, especially in reference to Warren Wilson's legacy of internationalism. Instrumental interpretations of internationalization typically emerged from senior administrators' data around marketing competition and international student recruitment, though many informants recognized instrumental realities of resource limitation and economic competition. Faculty and staff most often shared educationalistic perspectives on internationalization, speaking about interculturalism and student learning. Finally, a minority of participants shared decolonial critiques and perspectives on internationalization.

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Creating an Ecological Niche Model of Distribution of American Plains Bison (*Bison bison*) East of the Mississippi River; With Implications for Reintroduction

Abstract:

For a short period between the 1200s and 1800s, the range of the Plains Bison (*Bison bison*) extended east of the Mississippi River. There is much debate regarding the exact range the species occupied, the duration of occupation, and the factors driving this migration. Using MaxEnt, an ecological niche modeling software, this research takes a new approach to the old question of bison range. This research also addresses the question of reintroduction, as the Plains Bison has become symbolically important to this country and there are several successful examples of reintroduction in the west as well as one in the east. Historical resources, such as travel journals and letters, were analyzed to provide approximate locations of bison sightings from the late 1600s to the late 1700s. The researcher hypothesized that the range would favor the Barrens of Kentucky as well as northern grasslands of Pennsylvania, Illinois, and Ohio. The resulting range map shows that bison were scarce in the eastern United States, with the highest concentration being found on the east coast in the Carolinas and Florida, contrary to the researcher's hypothesis. Reintroduction could be beneficial from ecological, financial, and societal perspectives, but the researcher cautions against reintroducing an ecosystem engineer into an ecosystem that it inhabited so long ago and for such little time without further research into the effects of such a reintroduction.

Lyn Howe | Environmental Studies



Lyn Howe graduated in 2018 with a Bachelor's of Science in Environmental Studies with a concentration in Conservation Biology. She also completed a minor in Creative Writing, and was able to bring her separate interests together in this paper. She spent most of her career working in Creative Technologies in the library, where she became interested in GIS and other technology. Lyn found a passion for research while completing her NSURS, and hopes to one day soon begin graduate studies.

INTRODUCTION

While there are two species of bison native to North America, the Plains Bison (*Bison bison*) of the Great Plains is considered the most iconic mammal of the United States of America (Zontek, 2007). The historic population of bison was significantly larger than the current population with a greater range (Kelliher & Clark, 2010), and during a short time from approximately the 1400s to the 1800s, the range of bison expanded east across the Mississippi River (Belue, 1996). Many researchers have debated the exact timing of the eastward expansion, the factors driving the expansion, and the full range of the bison during this expansion.

Era of Bison Occupation East of the Mississippi River

Prior to European invasion of North America, bison roamed in large herds in the western United States, living mainly in short grass prairies (Kolipinski et al., 2014). Conservative estimates place the historic population of bison around 30 million animals (Kelliher & Clark, 2010) that were essential in maintaining the prairie ecosystems (Kelliher & Clark, 2010; Moran, 2014). Bison played a large role in subsistence of Great Plains Native American tribes, as well as being culturally and spiritually significant (Kolipinski et al., 2014; Zontek, 2007). Belue (1996) estimates that bison did not arrive east of the Mississippi until approximately the 1600s, though larger herds had existed west of the Mississippi for a much longer period of time. Earliest accounts of a large bovine creature east of the Mississippi come from Spanish explorers in modern day Florida during the 1600s (Belue, 1996). By the 1700s, French, English, and other explorers and settlers frequently reported bison in their travels, ranging from Wisconsin to Florida (Belue, 1996). By the late 1700s, the Plains Bison had been extirpated from its eastern range (Belue, 1996).

Theories Regarding Eastward Bison Expansion

Historians and ecologists have agreed that the European colonization of North America brought with it profound changes, both culturally and environmentally (Cronon, 1983). Prior

to European settlement, Native American land management practices in the east (namely, controlled burns) created and maintained prairie environments (Belue, 1996; Cronon, 1983). Several researchers have theorized that when the Native American populations decreased in the 1500s due to European influence, hunting pressure decreased as well, allowing bison to move into these savannahs (Belue, 1996; Trawick Ward, 1990; Zontek, 2007).

The bison migration eastward also coincided with the Little Ice Age, which affected North America from the 1300s through the mid-1800s (Bamforth, 1988). The Little Ice Age resulted in harsher winters, causing poor winter foliage (Bamforth, 1988). Bamforth (1988) indicates that bison suffering from poor nutrition may range farther than bison with more nutritious foliage. Hypothetically, bison presence in the eastern United States could have been caused by harsh winters forcing bison movement into new territories. This hypothesis could explain the early presences of bison in archaeological sites in Indiana and Illinois that were dated to a time prior to the invasion of European explorers and settlers (Colburn, 1989; Gums et al., 1988).

The Debate over Range

The range of bison east of the Mississippi river has come under much debate (Rostlund, 1960). In 1876, Allen and Hornaday developed a boundary line to define the southernmost extension of bison range. This line excluded parts of southern Louisiana, Alabama, Georgia, and all of Florida. Many have claimed this boundary to be incorrect as it ignores historical accounts placing bison south of the line (Rostlund, 1960). The 1959 map created by Hall and Kelson is less conservative, containing areas further south than the Allen-Hornaday boundary line (Rostlund, 1960). However, claims of an extensive range in the south are called into question by the legitimacy of sources. The tendency to exaggerate has cast doubt upon some reports of large herds by explorers of the time. Another factor that makes these models problematic is the lack of evidence indicating whether these were sustained populations or whether they were more ephemeral (Trawick Ward, 1990; Van Horne, 2013).

For this project, the researcher addresses the question of range and distribution through a process known as ecological niche modeling. Ecological niche modeling predicts the distribution of a species as a factor of environmental variables.

Bison Hunt, Population Crash, Conservation, and Reintroduction

By the late 1700s, settlers in the east began to notice the disappearance of bison from areas to which they had been accustomed to finding great herds of them (Belue, 1996). In 1832 in Wisconsin, the last two wild buffalo in the eastern United States were killed (Belue, 1996). The western herds of bison fared little better. By the mid to late 1800s, the wild bison herds that had once characterized the Great Plains had been effectively eliminated. Factors that led to this extermination include the movement of European settlers westward, the increase in monetary value of bison meat and hides, the increase in popularity of hunting as a sport (as well as hunting incentive from a government that wished to demoralize Native American tribes), and the creation of the railroad which crossed the Great Plains (Kolipinski et al., 2014). The remnants of western herds of plains bison survived in Yellowstone National Park and in several private herds (Zontek, 2007).

Foremost amongst the private individuals who preserved herds were several Native American individuals from Great Plains tribes, such as James McKay and Samuel Walking Coyote, who began a legacy of bison conservation upheld by the modern Intertribal Bison Cooperative which has been integral to rescuing the plains bison from extinction (Zontek, 2007). In his book on the subject, Zontek (2007) describes a parallel between the control Native Americans have been allowed over their land and the health of bison herds on their land. Today, about 60 tribes of Native Americans in North America control over 20,000 bison (Zontek, 2007).

Meanwhile, there has been little attempt in the eastern United States to reintroduce wild bison to their historic habitats. This may be due to a lack of similar connection between Eastern Native American Tribes and the bison, or perhaps due to lack

of ecological necessity for such impactful ecosystem engineers. However, in order to have a meaningful discussion regarding bison reintroduction and management, we must begin by filling in many gaps in knowledge regarding the historical distribution and ecology of eastern herds of bison.

In his insightful book *Forgotten Grasslands of the South*, Reed F. Noss describes the eastern prairies and savannahs that bison could inhabit as disappearing rapidly. The reintroduction of bison could assist in the preservation and restoration of southeastern grasslands. Due to their size, their herding behavior, and their grazing behavior, they are efficient ecosystem engineers that help preserve the prairies in which they flourish. Additionally, bison are undeniably stunning animals with high cultural significance. The bison has become one of the great symbols of the United States, and in 2015 it became the national mammal of the country (H.R. 2908, 2015). It is both a symbol of the United States' failures as well as its successes, in that it symbolizes the destruction and ignorance of our past as well as our hope for the future. In this sense, the bison is not only a creature of great ecological importance, but also of great cultural importance. As they re-enter their western range, it is important that we also understand their ecological and cultural history.

Understanding the history of the bison is one more important piece to understanding the impacts our country has had on the land and its inhabitants, as well as towards developing better ways to interact with our environment now and in the future. This study comments on the practicality of reintroduction in the east and gives recommendations regarding potential habitat.

METHODS

Ecological Niche Modeling

This study brings a new perspective to the question of bison conservation, that of recent innovative software technology. The researcher has used the ecological niche modeling algorithm MaxEnt to make a distribution model of bison east of the Mississippi River during the 1100s to the 1800s. The model relies on a combination of known distribution data and environmental

variables to predict distributions (Soberon, 2005).

In recent years, Ecological Niche Modeling has become a frequently used technique. It has been utilized for predicting the full range of species which are difficult to sample, or predicting the response a species distribution may have to climate change (Soberon, 2005). The model in this research relies on evidence from the faunal record, historical records, and information on the biotic and abiotic requirements of bison to generate this model. While many algorithms need data on both presence and absence of the species for a given area, MaxEnt utilizes presence only data and generates background absence data. Though we can find presence data from the aforementioned sources, absence data would be beyond the ability of the researcher to utilize due to the nature of the research.

Presence data

Presence data was obtained from two sources. The first source was from travel journals, both original documents and secondary sources citing journals from 1686 through 1784 by explorers and settlers traveling east of the Mississippi river. All references to bison or buffalo were cross referenced with Google Maps to provide an approximate location. The coordinates of the nearest town or city were then compiled into a CVS file.

Table 1: The locations of *Bison bison* according to historical sources

Observer	Longitude	Latitude	Nearest City	Reference
Dr. Thomas Walker, 1750	-82.5618	36.5484	Kingsport, TN	(Walker, 1750)
Dr. Thomas Walker, 1750	-83.5709	36.6094	Wheeler, VA	(Walker, 1750)
Dr. Thomas Walker, 1750	-80.9937	33.8573	Laurel Creek, WV	(Walker, 1750)
George Croghan, 1765	-88.7320	37.1512	Metropolis, IL	(Belue, 1996)

Observer	Longitude	Latitude	Nearest City	Reference
George Croghan, 1765	-80.0095	40.4406	Fort Pitt, PA	(Belue, 1996)
George Croghan, 1765	-81.9062	38.9470	Antiquity, OH	(Belue, 1996)
George Croghan, 1765	-88.7320	37.1512	Fort Massac, IL	(Belue, 1996)
George Croghan, 1765	-84.7482	38.8883	Big Bone Lick, KY	(Belue, 1996)
George Croghan, 1765	-81.5615	39.2667	Parkersburg, WV	(Belue, 1996)
Andres Gonzales de Barcia, 1718	-84.2097	30.1523	Fort San Marcos, FL	(Belue, 1996)
Harry Gordon, 1766	-79.9959	40.4406	Fort Pitt, PA	(Mereness, 1916)
Diego Pena, 1716	-81.6557	30.3322	Jacksonville, FL	(Boyd, 1949)
Diego Pena, 1716	-82.7137	29.9233	Fort White, FL	(Boyd, 1949)
Diego Pena, 1716	-84.2807	30.4383	Tallahassee, FL	(Boyd, 1949)
Diego Pena, 1716	-84.8602	30.6930	Mosquito Creek, FL	(Boyd, 1949)
Kasper Mansker, 1770	-86.7816	36.1627	Nashville, TN	(Albright, 1909)
Issac Bledsoe, 1771	-86.3080	36.3937	Castalian Springs, TN	(Albright, 1909)
De Celeron, 1737	-90.049	35.1495	Memphis, TN	(Atkinson, 2004)
William Bartram	-82.5851	33.9784	Bobby Brown State Park, GA	(Bartram, 1791)

Observer	Longitude	Latitude	Nearest City	Reference
Mark Catesby, 1772	-81.8909	33.4274	Beech Island, SC	(Horne, 2013)
John Filson	-83.9915	38.4344	Blue Lick, KY	(Filson, 1784)
John Filson	-85.0000	37.9976	Bullet Lick, KY	(Filson, 1784)
Colonel William Byrd,1728	-81.5188	36.4610	Warrensville, NC	(Horne, 2013)
Colonel William Byrd,1728	-78.9283	36.7660	Halifax, WV	(Byrd, 1728)
Colonel William Byrd,1728	-86.7816	36.1627	Nashville, TN	(Byrd, 1728)
Daniel Smith, 1780	-84.7480	36.9967	Nancy, KY	(Sioussat, 1915)
Daniel Smith, 1780	-86.4467	36.3884	Gallatin, TN	(Sioussat, 1915)
Henry de Tonti, 1700	-88.0399	30.6953	Mobile, AL	(Belue, 1996)
John Peter Salling, 1742	-81.1964	38.1618	New River, WV	(Salling, 1742)
William Bartram, 1784	-83.3576	33.9519	Athens, GA	(De Vorse, 2001)
Descendent of John Calhoun, 1756	-82.3790	34.1782	Abbeville, SC	(Belue, 1996)
Marcus Delgado, 1686	-85.2269	30.7744	Marianna, FL	(Belue, 1996)
Francis Moore, 1735	-81.4915	31.1500	Brunswick, GA	(Goff, 1957)
De Gannes, 1680-1693	-88.0817	41.5250	Joliet, IL	(Pease & Werner, 1934)

Archaeological site reports of sites east of the Mississippi were sorted by presence of bison remains. Because trade between various populations of Native Americans and settlers did occur, not all sites with bison present were utilized. Site reports in which the archaeologists interpreted the presence of bison as trade were discarded. These were sites in which the bison remains present were worked trade items such as bison scapula shaped into hoes. Site reports in which the archaeologists were uncertain whether the remains were bison or not were discarded. All other sites were cross-referenced using Google Maps to provide approximate latitude and longitude. These coordinates were added to the .csv file with the data from the travel journals, resulting in bison occurrences that were used for ecological niche modeling.

Table 2: The presence of *B. bison* based on archaeological sites

Name of Site	Longitude	Latitude	Era of Occupation	Reference
Wedge Site	-90.1901	38.5709	Late Mississippian	(Gums et al., 1988)
Murphy Site	-87.9923	37.8554	Late Mississippian	(Colburn, 1989)
Laurens Site	-90.1590	38.0878	1800s	(Jelks et al., 1989)
Big Bone Lick	-84.7482	38.8883	?	(Cincinnati Museum Center)
Madisonville Site	-84.3744	39.1451	Protohistoric	(Brose et al., 2010)
Slim Lake Site	-90.6073	39.7573	Protohistoric	(Brose et al., 2010)
Zimmerman Site	-88.9934	40.3198	Historic	(Illinois State Museum)
Waide Site	-88.6503	33.6077	Protohistoric	(Johnson et al., 1994)
Crawford Farm	-90.5721	41.4531	1790-1810	(Parmalee, 1964)

Environmental Variables

Bioclimatic layers (Appendix A) from worldclim.org were downloaded into QGIS. This data was global, but the researcher used the extraction tool to clip the data to the eastern United States. These layers are modern, as temperature and precipitation data from the period in question were not available to the researcher.

Since fire is the main disturbance mechanism in maintaining grasslands (Noss, 2013), fire and temperature anomaly data from the year 2001 were downloaded from USDA Forest Service Remote Sensing Applications page. This data is the result of satellite imagery from NASA, the University of Wisconsin, and USDA Forest Service. The fire data was downloaded as a vector layer and was rasterized using the QGIS rasterization tool. The output raster used was the temperature raster layer mentioned above. All layers were transformed from .bil to ascii format.

Ecological Niche Modeling

The MaxEnt species distribution mapping algorithm was utilized to analyze the presence data and predict species distribution based on the environmental variables mentioned above. MaxEnt was chosen for several reasons. It is a very popular program for ecological niche modeling, due to its ease of use and predictive accuracy (Merow et al., 2013). It was also chosen due to its ability to calculate pseudoabsences (Merow et al., 2013), as absence data was not available to the researcher. The coordinate comma separated values file compiled from historical and archaeological sources was uploaded to MaxEnt as the samples for the software to utilize. The raster layers for bioclimate and fire were uploaded as environmental layers.

The option to do jackknife to measure variable importance was selected in order to measure the predictive capabilities of the environmental variables utilized was selected. The output form chosen by the researcher was logistic output format. The logistic output format and the raw output format give similar results when the presence data is sparse, but the logistic output format is easier to interpret (Merow et al., 2013). The option to remove duplicate presence records was not selected. The options to write clamp

grids and do MESS analysis were selected. The sample radius was adjusted to -6 in order to minimize the area size of the test data, which makes the prediction easier to read.

Table 3: Trial Settings

Trial	Features	Random Test %	Regularization Multiplier	Maximum Background Points
Trial 6	Auto	10	1	10000
Trial 7	Linear, Quadratic	25	5	10000

Features, Random Test Percentage, Regularization Multiplier, and Maximum Background Points were altered to test various assumptions (Table 3). Features are mathematical transformations of environmental variables intended to simplify response curves (Merow et al., 2013). Product, Threshold, and Category Features were not used as they are more appropriate for larger sample sizes (Elith et al., 2011). Not all of the features offered were selected for each test as the more features utilized make the solution more complex.

Linear features were selected in order to make the mean of the environmental variable where presence is predicted equal the mean of the environmental variables where presence was observed (Merow et al., 2013). Quadratic features were selected in order to constrain the variance of the environmental variables for where presence is predicted to the same variance of the environmental variables where presence was observed (Merow et al., 2013). Hinge features are used to study more complex relationships between environmental variables and test data and have been shown to improve model performance (Phillips & Dudík, 2008).

In order to create the prediction, MaxEnt first must “train” the software using a percentage of the presence data. 25 and 10 were used by the researcher.

Regularization is the process used by MaxEnt to choose which features are used in the model. Each type of feature is

assigned its own regularization coefficient, but these may be multiplied by a constant chosen by the user. Brown (2014) suggested regularization multiplier to be set as five when linear and quadratic features or linear, quadratic, and hinge features are used in conjunction.

MaxEnt chooses points that were not sampled with which to compare the areas that presence is known to occur. These points are known as background points (Merow et al., 2013). The number of background points is typically much higher than the number of presences (van Proosdij et al., 2016). Both trials used 10000 backgrounds points.

RESULTS

Trial 6

Figure 1: The range and distribution of bison based on predictions made in Trial 6. The white squares represent locations of presence data used for training. The violet squares represent test locations.

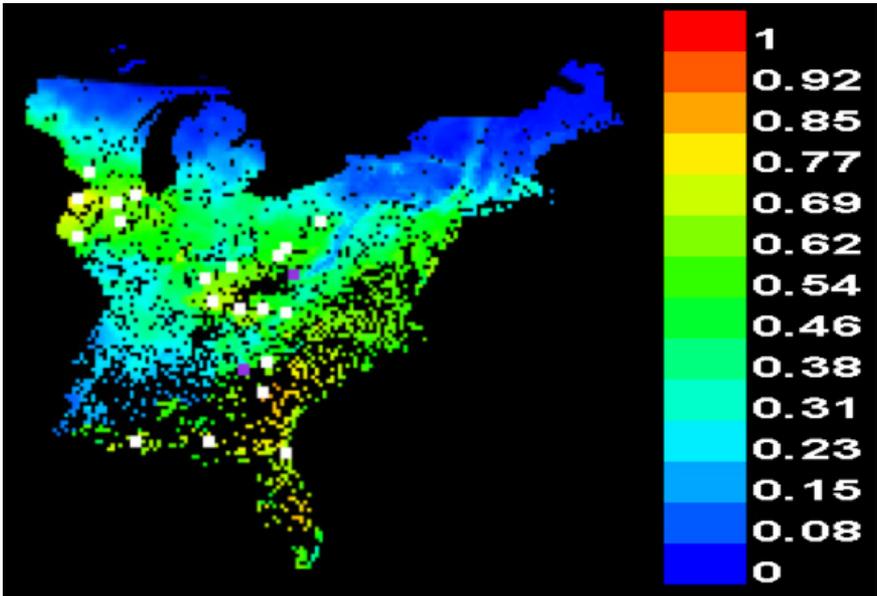


Table 1: The % Contribution and Permutation Importance of Environmental Variables on the range and distribution of *Bison bison* in the prediction made by Trial 6.

Variable	Percent Contribution	Permutation Importance	Description of Variables
Bio 1	46.4	31.8	Mean annual temp
Bio 8	26	14.9	Mean temp of wettest quarter
Bio 18	11.4	2	Precipitation of warmest quarter
Bio 9	6.7	19	Mean temp of driest quarter
Bio 14	4.1	26.1	Precipitation of the driest month
Fire Bio 1	2.7	2.7	Fire + bio 1
Bio 5	1.9	0	Max temp of warmest month
Bio 2	0.3	1.6	Mean diurnal temp range

Figure 2: Graph showing omission and predicted area for Trial 6. The closer the Omission rate of training samples is to the omission of test samples, the more accurate the test.

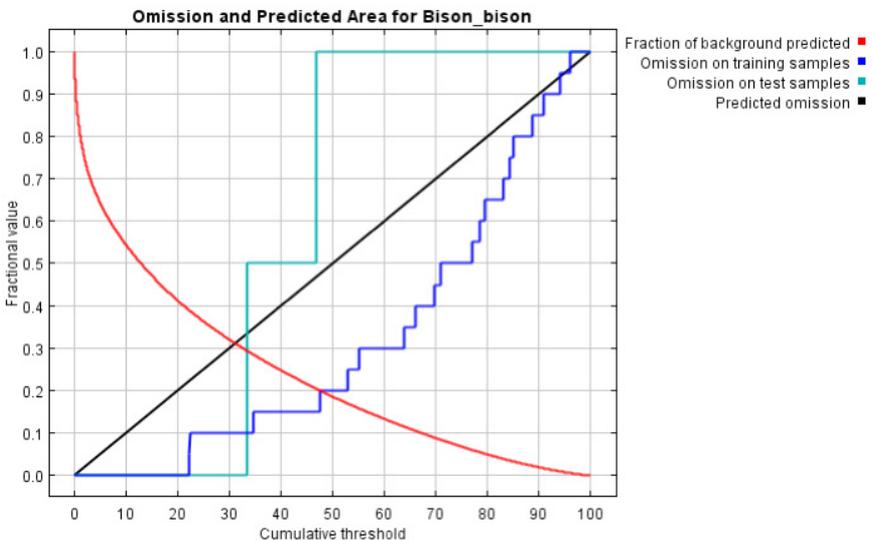
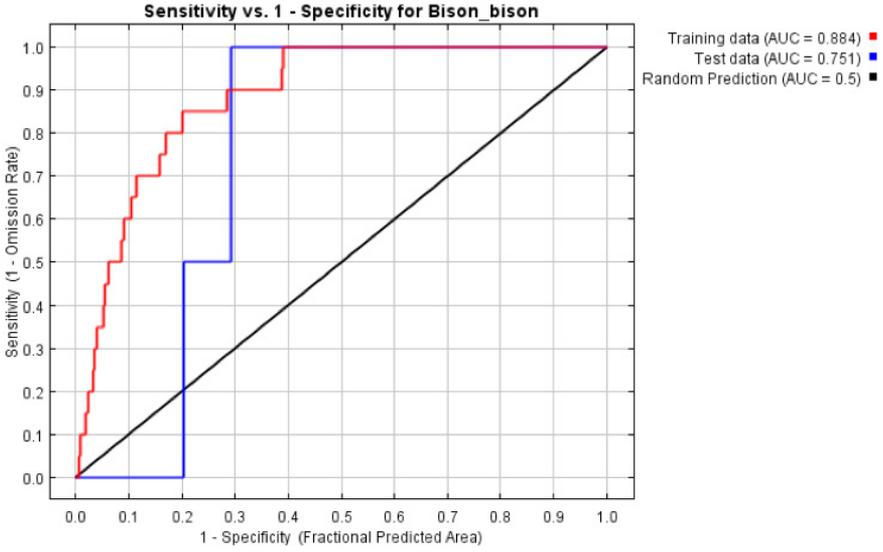


Figure 3: Graph showing sensitivity and specificity for Trial 6. The red line shows the area under the curve for the training data. The black line represents the AUC for a random prediction. The closer the AUC for the training data is to one, the more accurate the prediction.



The AUC for the training data in Trial 6 was 0.884. See the Appendix C for response curves. See Appendix B for Jackknife results.

Trial 7

Figure 4: The range and distribution of bison based on predictions made in Trial 7.

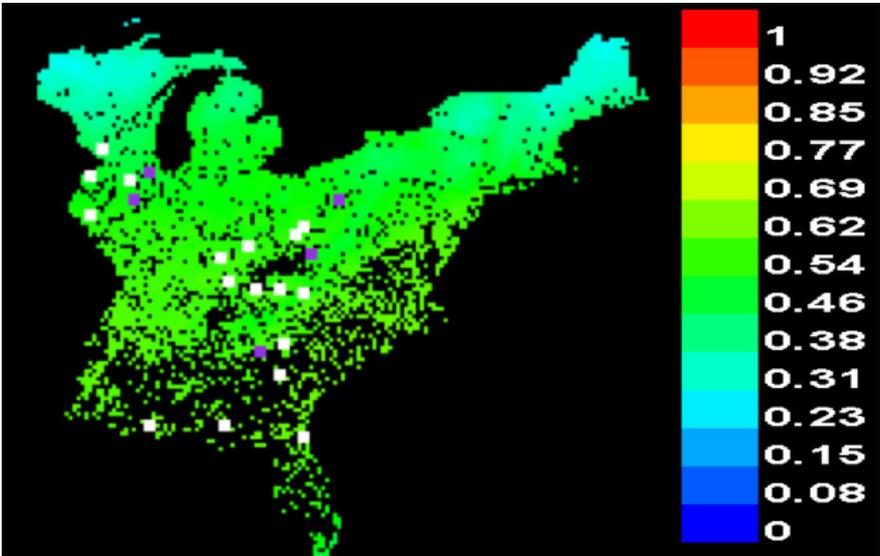


Table 2: The % Contribution and Permutation Importance of Environmental Variables on the range and distribution of *Bison bison* in the prediction made by Trial 7.

Variables	Percent Contribution	Permutation Importance	Description of Variable
Bio 6	92.6	90.3	Minimum temp of coldest month
Bio 10	5.5	0	Mean temp of warmest month
Bio 8	1.9	9.7	Mean temp of wettest quarter

Figure 5: Graph showing omission and predicted area for Trial 7. The red line shows the fraction of background predicted. The Omission rate of Training Samples is in dark blue. The closer the Omission rate of training samples is to the omission of test samples, the more accurate the test.

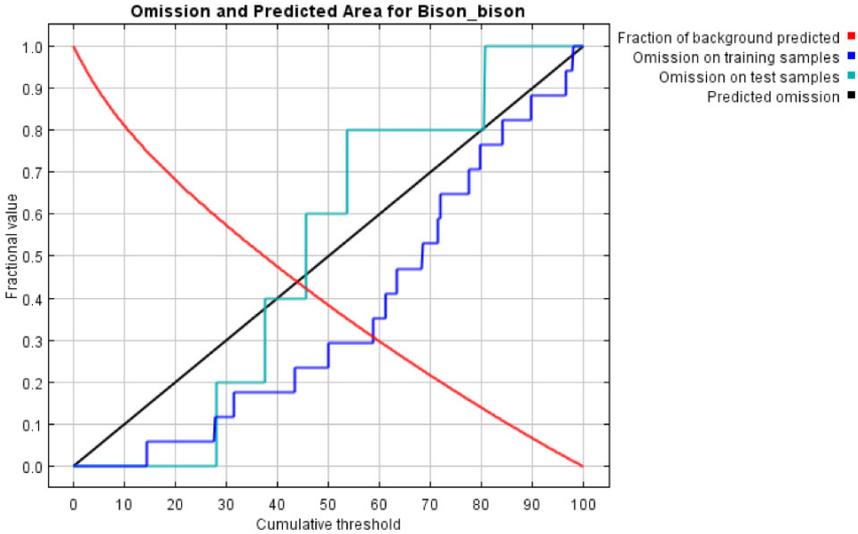
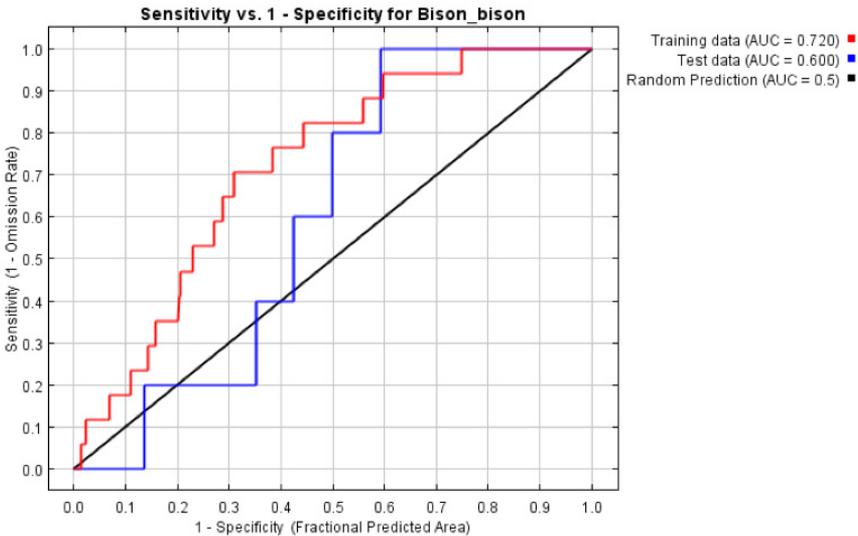


Figure 6: Sensitivity and specificity for *Bison bison* based on Trial 7.



DISCUSSION

Historical Resources

Thirty-four of the locations come from travel journals and other records dating between the late 1600s and the late 1700s, fitting the hypothesis that Plains Bison lived in the east during that era. However, there is an obvious bias. Written records accessible to the researcher did not appear until the historic era, leading us to question whether these records indicate that bison only existed in the east during the 1600s and the 1700s or, alternatively, bison were only recorded in a way accessible to the researcher during the 1600s and the 1700s, but had arrived east before then.

These records indicate bison presence in much of the eastern United States, including Illinois, Georgia, Florida, South Carolina, West Virginia, Alabama, Tennessee, Kentucky, North Carolina, Pennsylvania, Ohio, and Virginia. Tennessee and Florida had the highest number of observations.

These sightings were not made by scientists, and no there was no sampling method to unite them. These observations were three hundred years ago over the course of a century. With this in mind, there are many reasons to doubt the validity of these observations. In the resources analyzed by the researcher, the word “buffalo” or a variation is used rather than the word “bison.”

In his 2013 essay on the presence of bison in Georgia, Van Horne argues that the word “buffalo” is utilized by English writers to describe any bovine that they are unsure of. In Georgia and Florida, feral cattle escaped from Spanish herds may have encountered settlers and explorers (Van Horne, 2013). Van Horne (2013) proposes a case of mistaken identity—that the settlers had expected to find bison and therefore had described Spanish cattle as bison.

Trawick Ward (1990) suggests that various writers plagiarized each other until the truth of the matter was distorted and exaggerated. Ward also suggests that the identification of bison was a political and economic strategy to bring settlers into explored areas and thus may also cast doubt on the observation recorded. It is, therefore, impossible to collect trustworthy observational data on bison from such a long time ago.

Archaeological Resources

The researcher excluded all sites in which the author of the report was unsure as to identification or concluded that the remains could be attributed to trade. Because of this, the remaining nine sites are likely to be indicators of bison presence. These sites indicate presence in Mississippi, Illinois, Kentucky, and Ohio. Four of these sites were in Illinois.

The Wedge Site in Illinois and the Murphy Site in Indiana were dated to an era much earlier than hypothesized, but due to their proximity to the Mississippi River, these sites could represent the initial expansion of bison eastward. Later sites, such as the Laurens Site in Illinois, the Madisonville Site in Ohio, the Slim Lake Site in Illinois, and the Zimmerman Site in Illinois all match the researcher's hypothesis as far as era and range. The Waide Site in Mississippi does not fit with the range, but does fit the era. Johnson et al. (1994) indicates that bison habitat in the form of the Black Prairie did exist in Mississippi during that era.

While archaeological sources are a more modern and empirical source of information, they also come with some caveats. The possibility of trading makes the source of bison remains indeterminate in many cases. Misidentification of bison bones may also be a factor, as some remains may be confused with other species (Trawick Ward, 1990) such as elk or cattle. While these are factors may overestimate presence, underestimation of presence may also be a factor. The lack of bison remains in the faunal record may be due to bison being butchered away from the site that was later excavated (Trawick Ward, 1990). As the researcher excluded those sites which are likely to be explained by trade or for which the identification was under question, the remaining nine sites are highly likely to indicate presence of bison.

Ecological Niche Modeling

Trial 6

The omission, also known as the false negative rate, describes instances where the model predicted unsuitable conditions, but at which bison presence occurred. The more accurate a model is, the closer the omission on the training data

should fit the predicted omission. Refer to Figure 2. The omission of the training data (dark blue) does not fit as close to the predicted (black) as is preferred, but still follows it well.

Figure 3 displays the area under the curve (AUC). An AUC value of 0.5 would indicate that the model influenced by environmental variables is not any more precise than a model based on random distribution. An AUC value closer to 1 indicates that the model influenced by environmental variables is far from a model in which the distribution is random. The AUC value for Trial 6 was 0.884, indicating that the model was fairly precise.

Test results show variation in likelihood across the eastern United States. The northern parts of Wisconsin and Michigan as well as New York, Vermont, and Maine show low probability, around 20%. A higher likelihood of around 50% was found in Illinois, Indiana, Ohio, Pennsylvania, New Jersey, Delaware, Virginia, Kentucky, and Tennessee supports the researcher's hypothesis. A likelihood of about 50% was also found in Delaware and North Carolina, further east than the researcher suspected. The likelihood increased to around 85% in parts of South Carolina and Florida, which is farther south than predicted. 50% likelihood was found in parts of Georgia, Alabama, and Mississippi. In the western parts of Mississippi, Tennessee, and Alabama, the likelihood decreases down to 20% or less.

Trial 7

Refer to Figure 5. The omission of the training data (dark blue) fits to the predicted better than the training data for Trial 6. Figure 6 displays the area under the curve (AUC). The AUC value for Trial 7 was 0.72, indicating that the model was fairly precise, though not as precise as Trial 6.

The picture of the prediction shows little variation in likelihood across the eastern United States. The northern parts of Wisconsin and Michigan as well as New York, Vermont, and Maine show low probability, around 30 to 40%. A higher likelihood of around 50% was found across the rest of the United States. The lack in heterogeneity across the picture makes it practically useless as a tool for prediction. While prairies and grasslands were not as rare

as they are today (Noss, 2013), it is unlikely that potential bison habitat was as uniformly distributed as this model suggests.

Reintroduction

Although the number of bison has increased since their near extinction in the 1800s, they have not recovered to their prehistoric extent (Kolipinski et al., 2014). Challenges to bison conservation reestablishment include the possibility of genomic extinction and habitat loss (Kolipinski et al., 2014). Modern bison herds are subject to a sort of genetic fragility, which is partially due to the genetic bottlenecks that occurred after the crash of the bison herds and partially due to the interbreeding of bison with cattle (Kolipinski et al., 2014). Grasslands, the natural habitat of bison, are one of the most threatened habitats in existence (Noss, 2013). Bison conservation in the Great Plains has been prevalent for the local tribal governments as well as state and federal government, where cultural associations to bison are strong and the ecosystems are dependent on bison presence (Kolipinski et al., 2014).

Tribal governments are at the forefront of bison conservation, with 60 tribes in North America managing over twenty thousand bison (Zontek, 2007). As the human population in the Great Plains decreases, new opportunities arise for bison habitat conservation that would not be possible in more densely populated areas (Kolipinski et al., 2014).

Although a relatively recent proposal, the reintroduction of bison into the eastern United States is not an entirely new idea. In Illinois in 2014, thirty bison were reintroduced to the Nachusa grasslands, which is comprised of over three thousand acres of prairie (Schuessler, 2015). This was done as an integral part of a larger attempt to restore prairie habitat in Illinois (Schuessler, 2015). Most of Illinois's prairie has been destroyed, and the lack of a large grazer hindered the restoration (Schuessler, 2015). The reintroduction of bison has had another effect as well: because bison are what conservationists often refer to as "charismatic megafauna," the presence of a large and culturally significant mammal has increased publicity for Nachusa grasslands and their

conservation efforts (Schuessler, 2015).

A dilemma arises around whether bison reintroduction is advisable in the east. Bison habitat is disappearing, perhaps indicating the resources to support herds are no longer in existence, but in a seemingly paradoxical line of reasoning, some suggest the key to preserving those ecosystems is the reintroduction of bison.

This research may indicate remaining suitable habitat in areas other than Illinois. Whether there are large enough undeveloped areas in the south east is a subject for further study. The low human population in the Great Plains, the stronger cultural attachment to the bison, and the necessity of a large grazer in the plains ecosystem are all factors that make the Great Plains a more realistic area for bison reintroduction. However, if separate herds were established in the east, it may improve eastern grassland conservation through the reestablishment of a large grazer and the publicity of charismatic megafauna. Further research on habitat availability and large grazer necessity would have to be done before recommendations could be made.

CONCLUSION

Preliminary research of secondary sources indicated that bison presence would mostly be found in Ohio, Illinois, Kentucky, Pennsylvania, with smaller populations in Tennessee and Virginia, and with no populations in Mississippi, Florida, or Alabama (Trawick Ward, 1990). Historical resources yielded evidence for bison in Tennessee, Virginia, West Virginia, Illinois, Pennsylvania, Ohio, Kentucky, Florida, Georgia, South Carolina, North Carolina, and Alabama. Tennessee, Florida, Kentucky, and West Virginia had the most locations from historical resources. However, the trustworthiness of this historical data has been called into question (Horne, 2013; Trawick Ward, 1990). If misidentification or exaggeration did occur, then the samples may not accurately represent the presence of bison. Deeper research of the available historic resources and a more selective process by which observations are used as presence data would lead to a more accurate model.

Archaeological data is scarce with regards to bison and

may in some cases reflect trade practices rather than bison presence. Archaeological resources yielded evidence of bison in Illinois, Indiana, Kentucky, Ohio, and Mississippi. The bulk of the archaeological evidence came from Illinois. It is unlikely the sites chosen by the researcher can be attributed to trade or misidentification. However, many site reports were unavailable to the researcher, which may mean that the archaeological data utilized is not the full faunal set for the Eastern United States. Greater access to archaeological site reports may yield more instances and improve the model.

The environmental niche model created by Trial 6 shows the highest concentration of bison in the southeast, which is contrary to the initial research and hypothesis and may be due to the misidentification of cattle in Florida. Therefore, without a more thorough vetting process for presence accounts and more access to presence accounts, it is impossible to know whether this is an accurate model.

While the eras of bison occupation were not the main focus of this research, the question was addressed. Most sources indicate that bison occupation occurred only from the 1600s to the 1800s. However, archaeological evidence from the Wedge Site, the Murphy Site, Madisonville Site, Slim Lake Site, and the Waide Site all yielded faunal remains from earlier eras (Brose et al., 2010; Colburn, 1989; Gums et al., 1988). Observation resources were limited to the 1600s and the 1700s. More comprehensive research of archaeological sites may yield more evidence of earlier occupation, or it may prove that these sites are anomalies.

Another question the researcher encountered was the variables prompting the bison movement east. This could be due to harsh climate forcing bison to range further to find grazing as the movement coincided with the Little Ice Age. It may also be due to the change in land use and hunting pressure as Native American population decreased, prior to the European bison hunt.

Environmental modeling shows high probability of bison presence in the southeast, with lower probability in Illinois, Indiana, Pennsylvania, and southern New England. In the northeast, probability was very low. Although this study was

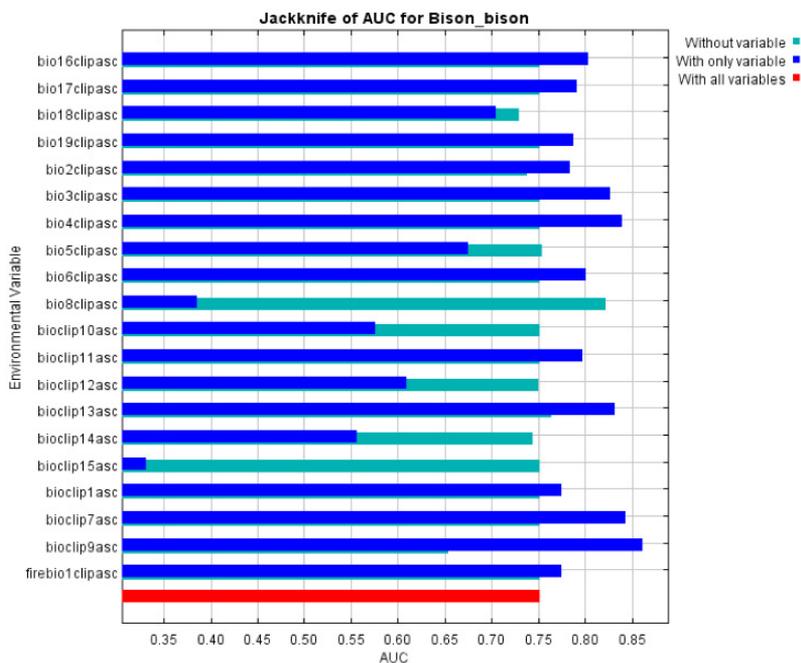
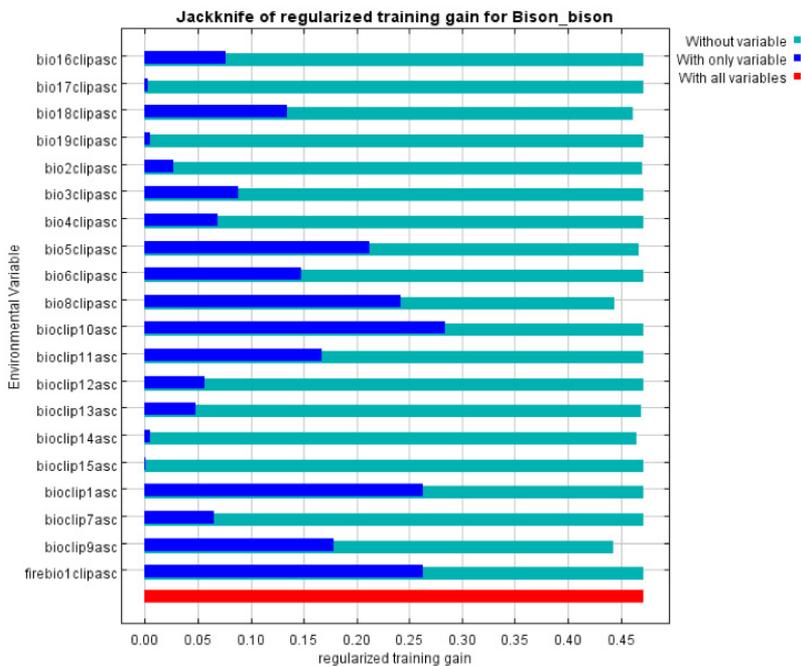
unable to determine range and distribution beyond a shadow of a doubt and was unable to make conclusive recommendations regarding reintroduction, this study was successful in setting a framework for a future, more comprehensive study, as well as serving as an example of the utility of ecological niche modeling, as well as its ability to address questions that seem beyond our ability to answer. The data gathering process and the subsequent MaxEnt maps hint at a more prolific spread of bison in the southeast than anticipated and previously cited. This makes the proposition to reintroduce bison in the east more realistic and grounded in historic distributions. As ecosystem engineers, their very presence in the landscape could restore an important and endangered ecosystem. Additionally, their presence would draw tourists and social interest, which in turn could increase the resources available for preservation. However, measures such as introducing a major ecosystem engineer should not be taken without thorough research into the effects this may cause.

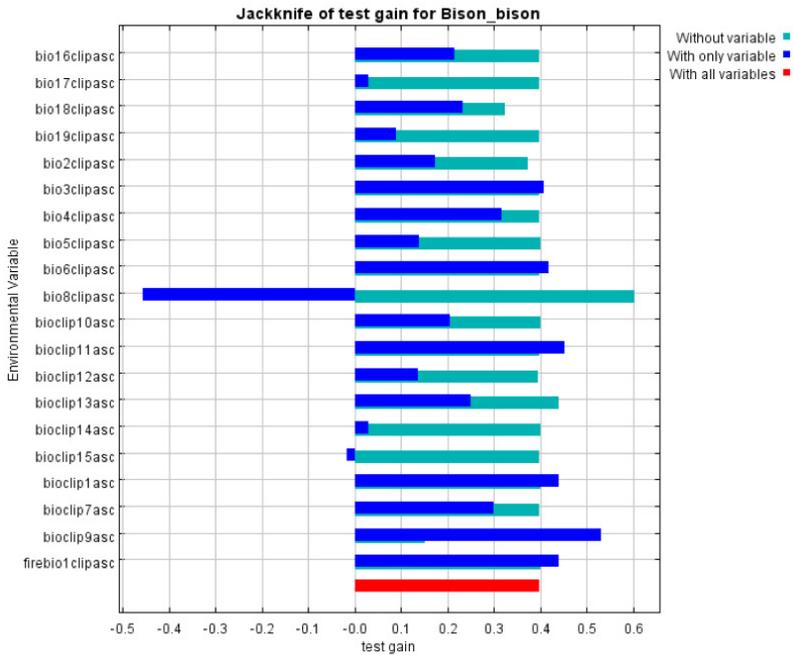
APPENDICES

Appendix A: Bioclimatic Variables

- BIO1 = Annual Mean Temperature
- BIO2 = Mean Diurnal Range (Mean of monthly (max temp - min temp))
- BIO3 = Isothermality (BIO2/BIO7) (* 100)
- BIO4 = Temperature Seasonality (standard deviation *100)
- BIO5 = Max Temperature of Warmest Month
- BIO6 = Min Temperature of Coldest Month
- BIO7 = Temperature Annual Range (BIO5-BIO6)
- BIO8 = Mean Temperature of Wettest Quarter
- BIO9 = Mean Temperature of Driest Quarter
- BIO10 = Mean Temperature of Warmest Quarter
- BIO11 = Mean Temperature of Coldest Quarter
- BIO12 = Annual Precipitation
- BIO13 = Precipitation of Wettest Month
- BIO14 = Precipitation of Driest Month
- BIO15 = Precipitation Seasonality (Coefficient of Variation)
- BIO16 = Precipitation of Wettest Quarter
- BIO17 = Precipitation of Driest Quarter
- BIO18 = Precipitation of Warmest Quarter
- BIO19 = Precipitation of Coldest Quarter

Appendix B: Jackknife Results Trial 6





Appendix C: Trial 6 Response Curves

Figure C1: The response of the distribution of *Bison bison* according to Trial 6 to mean annual temperature (variable Bio 1).

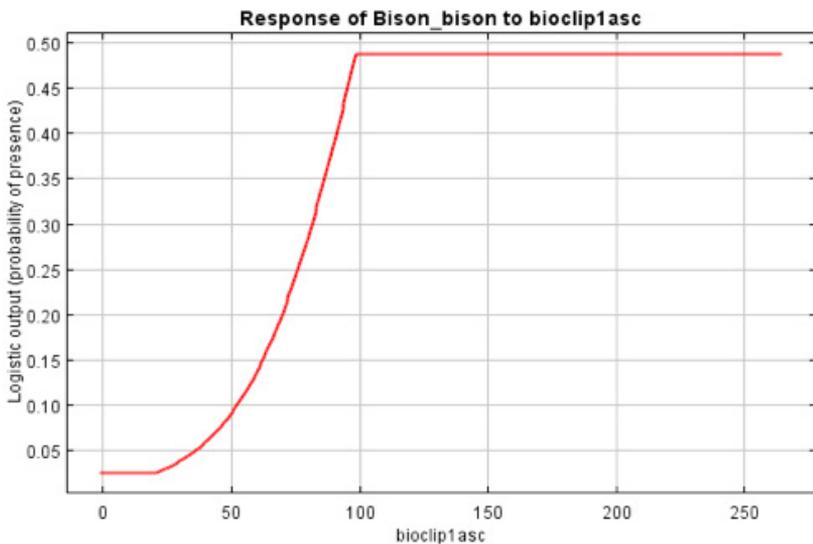


Figure C2: The response of the distribution of *Bison bison* according to Trial 6 to the mean temperature of the wettest quarter (variable Bio 8).

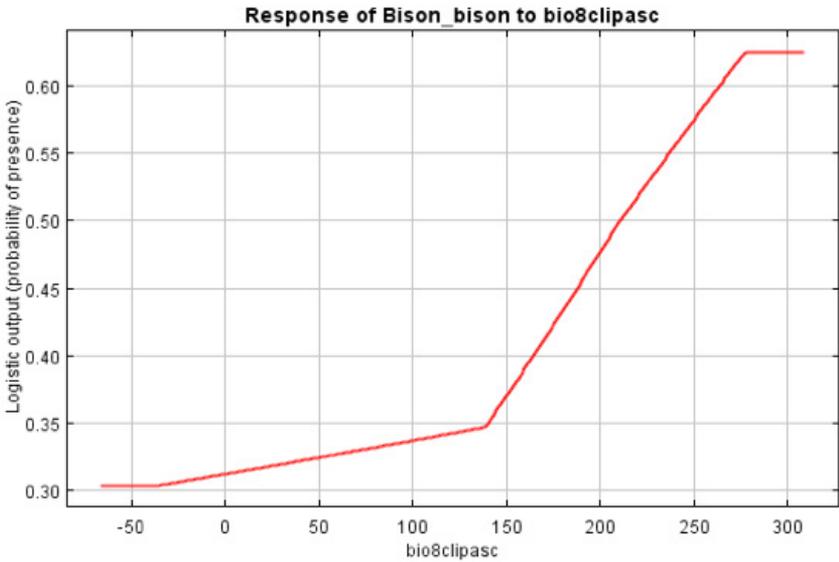


Figure C3: The response of the distribution of *Bison bison* according to Trial 6 to the precipitation of the warmest quarter (variable bio 18).



Figure C4: The response of the distribution of *Bison bison* according to Trial 6 to the mean temperature of the driest quarter (variable Bio 9).

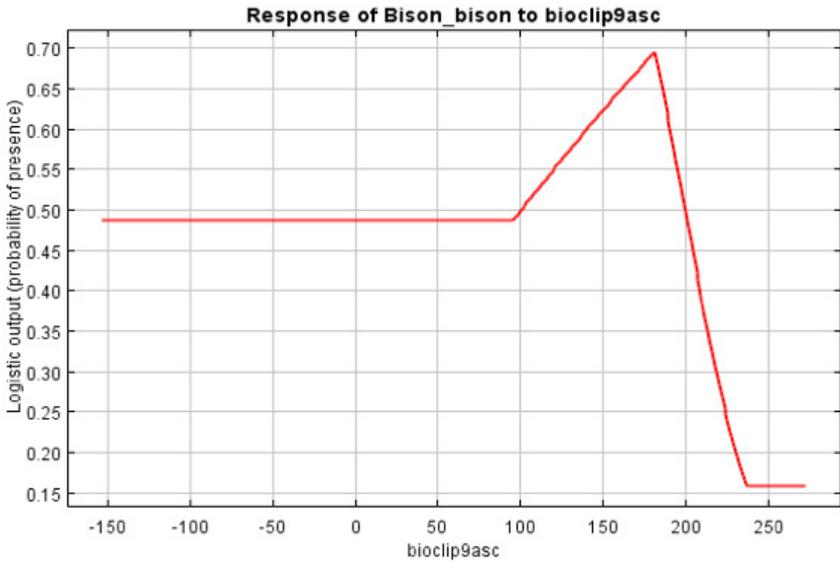


Figure C5: The response of the distribution of *Bison bison* according to Trial 6 to the mean temperature of the driest month (variable 14).

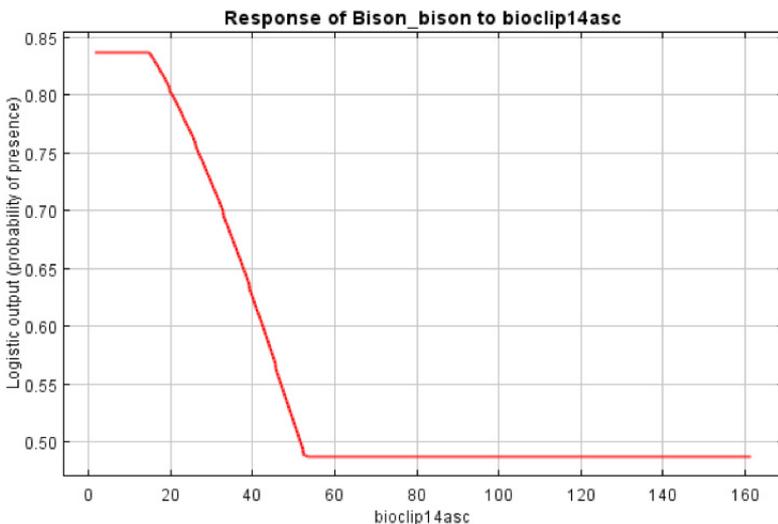
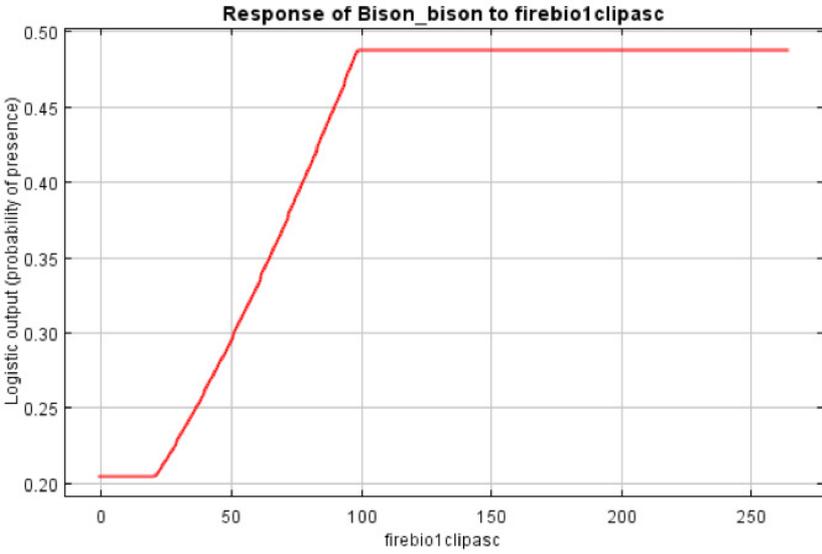
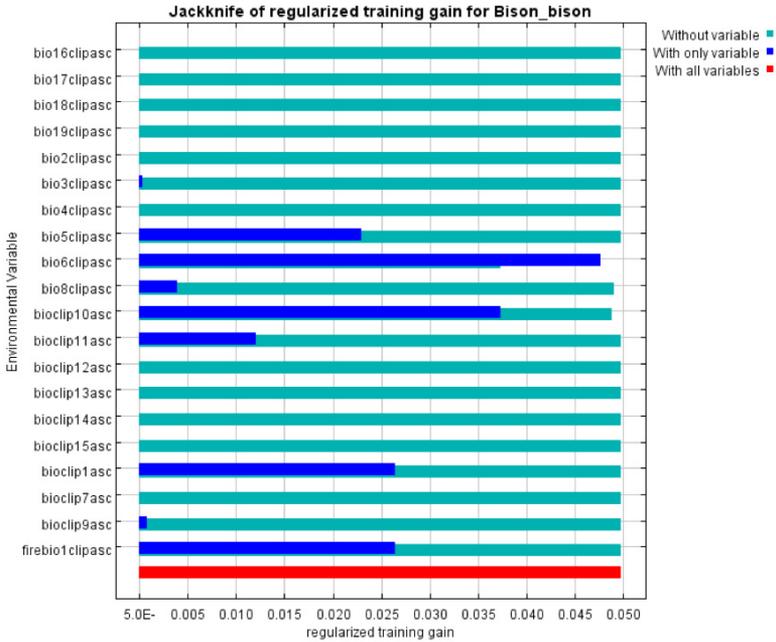
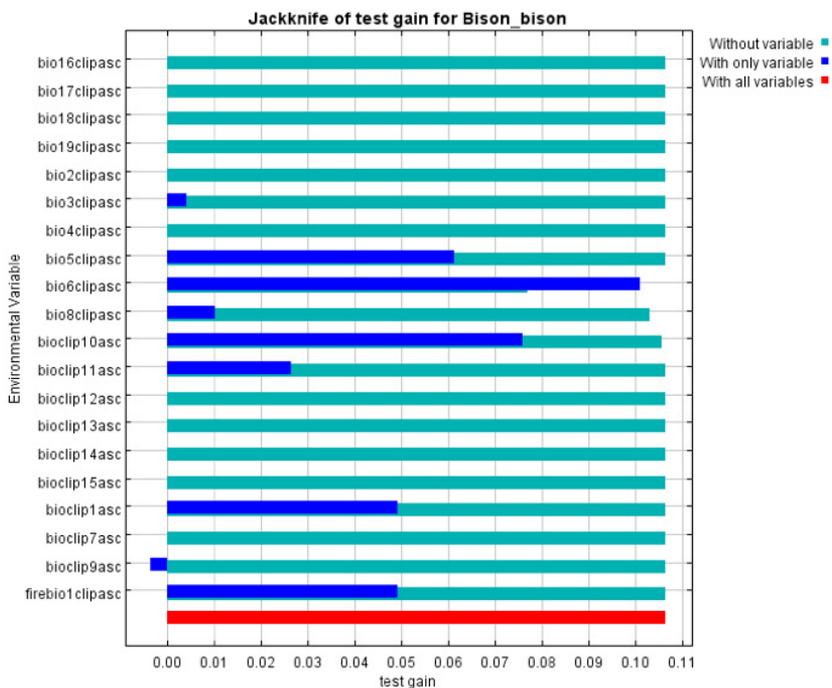
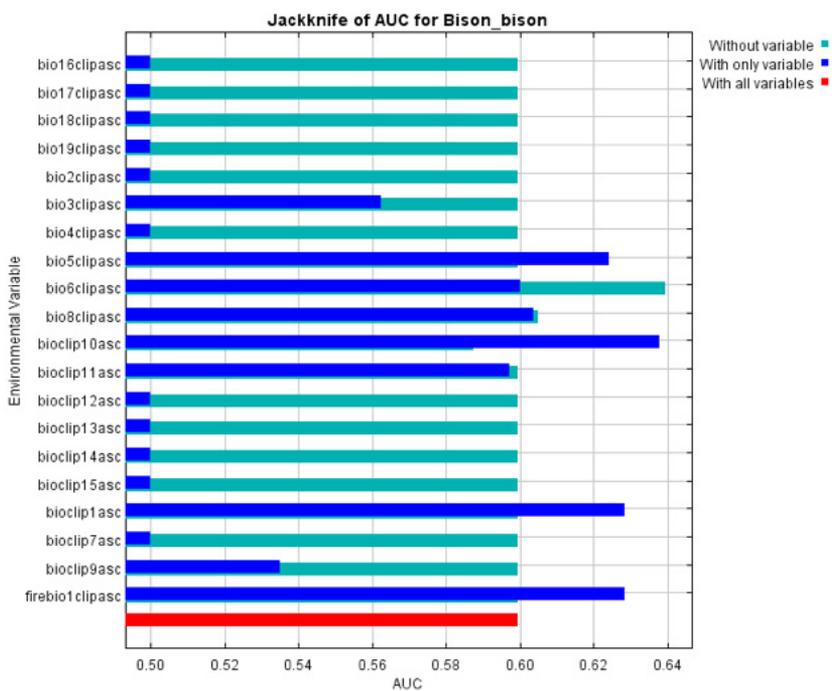


Figure C6: The response of the distribution of *Bison bison* according to Trial 6 to the rasterized fire layer.



Appendix D: Trial 7 Jackknife Results





Appendix E: Trial 7 Response Curves

Figure E1: The response of the distribution of *Bison bison* to the minimum temperature of the coldest month in Trial 7 (Bio 6).

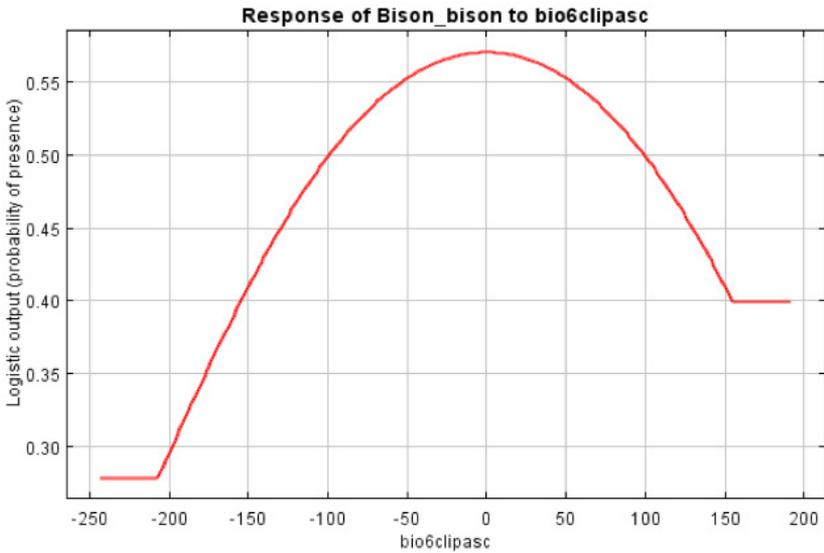


Figure E2: The response of the distribution of *Bison bison* to the mean temperature of the warmest month in Trial 7 (Bio 10).

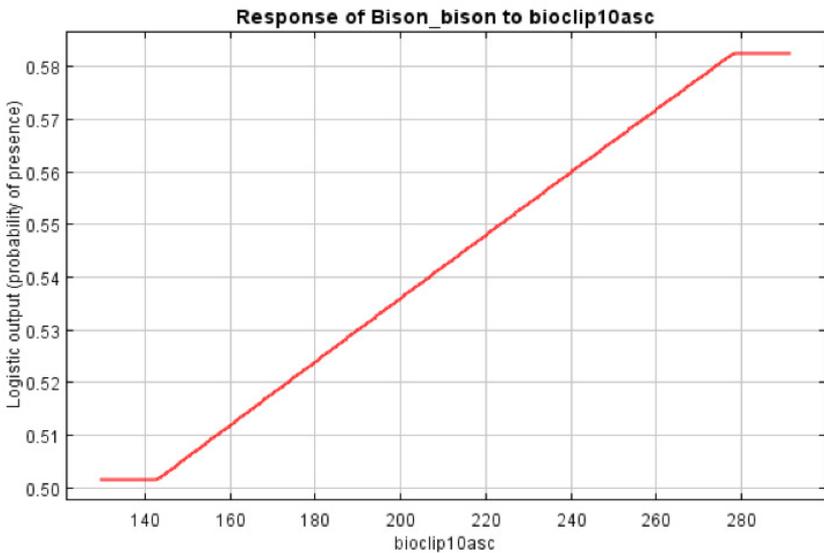
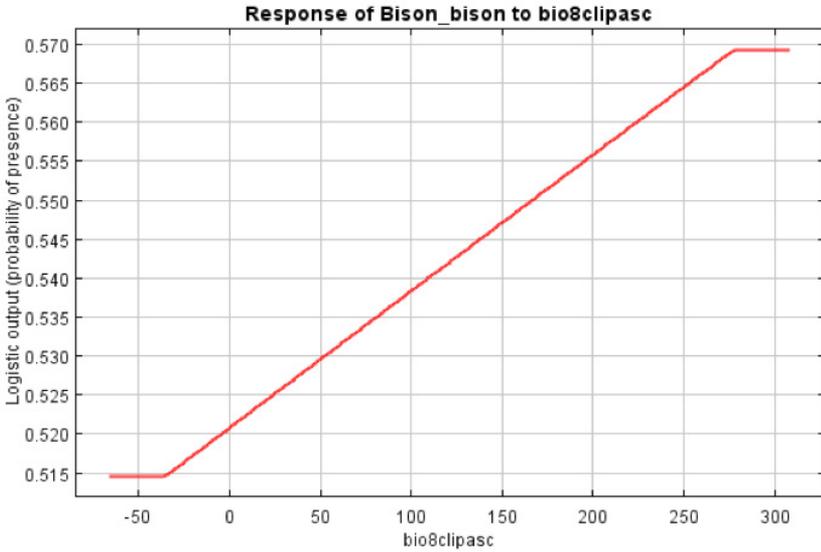


Figure E3: The response of the distribution of *Bison bison* to the mean temperature of the wettest quarter in Trial 7 (Bio 8).



Appendix F: Researcher's Reflection

On May 5th, 2016, President Barack Obama signed the National Bison Legacy Act, which adopted the bison as the national mammal of the United States (H.R. 2908, 2015). In the text associated with the act, the House of Representatives states a variety of reasons behind this decision. Among those reasons was the economic, ecological, and cultural importance of bison in the United States, both in a historic and modern context (H.R. 2908, 2015). With its many mentions of Native American culture and tribal bison restoration, it reads as an attempt to finally recognize and legitimize native culture (H.R. 2908, 2015). But words without action are just words, and symbolic apologies do little to improve the country. The reintroduction of bison in the western United States is promising, and as human population decreases in the Great Plains, perhaps a full restoration will be possible in that area. But any ecological action must be informed, and based on the latest scientific research. As this country pushes toward peace and sustainability, we must recognize the importance of scientific inquiry and properly support and promote it.

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subjective exploration of ethereality
by Jesse Raven

Reclamation through Reiteration: Subverting Didacticism in Feminist Fairy Tale Retellings

Abstract:

This essay is an analysis of the ways in which harmful didactic themes in traditional fairy tales can be identified and subverted through the act of retelling. The essay explores feminist retellings of Charles Perrault’s “Bluebeard”—specifically, Angela Carter’s “The Bloody Chamber” and Margaret Atwood’s “Bluebeard’s Egg”—for the ways the authors take an inherently misogynistic story structure and reconstruct it to not only address its problematic themes but also subvert them, effectively reclaiming the story under more progressive terms. The essay analyzes the implications of perpetuating misogynistic fairy tales in modern culture as well how retelling these tales can lead to new understandings of the issues explored therein across both historic and modern contexts.

Molly Howard | English



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INTRODUCTION

“The puppet master, open-mouthed, wide-eyed, impotent at the last, saw his dolls break free of their strings, abandon the rituals he had ordained for them since time began and start to live for themselves; the king, aghast, witnesses the revolt of his pawns.”

—Angela Carter, *“The Bloody Chamber”*

It would seem that the guiding principle for many fairy tales is that “a spoonful of sugar makes the medicine go down,” particularly if that medicine manifests as misogyny, classism, or violence. The original fairy tales of the 18th century utilized a clever cocktail of magic and whimsy to lighten the blow of a shocking amount of violence-imbued morality. Some examples of this violence include how Cinderella’s stepsisters have their eyes pecked out by doves “and so they were punished for their wickedness and malice with blindness for the rest of their lives” (*Classic Fairy Tales* 122); Snow White’s stepmother is punished for her cruelty by having to “put on ... red hot iron shoes and dance in them until she dropped to the ground dead” (*Classic Fairy Tales* 89); and the little boy’s stepmother in “The Juniper Tree” “chopped him up ... put the pieces into a pot and cooked him up into a stew” (*Classic Fairy Tales* 192). Extreme violence as a means of serving justice is a theme that is reiterated again and again in the tales that were intended to serve as moral compasses for children and parents alike. The whitewashed fairy tales in common circulation today have little to no remnant of these cruel origins, and the visceral lesson that seems to be conveyed through the majority of these tales is that goodness is rewarded with worldly gain, and wickedness is punished with a brutal death or mutilation. It is a wonder that children being fed these lessons dared to act out at all for fear of receiving some cosmic, bloody serving of justice.

Perhaps most well-known in the folklore realm are the Brothers Grimm, who recorded oral folktales that had been passed from generation to generation, compiling a collection that would become the basis of what we recognize to be the “classic” fairy tales. However, as they collected these tales they actively edited

and censored them, moving them from their original intention of being adult entertainment for the working class to instead function as a “manual of manners” for children (*Classic Fairy Tales* 373). They imbued many of the tales with a structure intended to express some sort of moral or behavioral message for the improved upbringing of children, and this is where the root of didacticism in the classic tales lies, or, where “the moral of the story” was born. However, beyond the didactic qualities the Grimms implanted in these stories, fairy tales are also rife with social lessons and messages being conveyed to the children and adults reading them, most notably that of the moral fallibility of women, the power and importance of money, and the promise of a happy ending for obedient children. Jack Zipes, a leading scholar in fairy tale and folklore studies, reiterates this point, saying, “discreet inquiry and censorship have always been employed to guarantee that fairy tales were more or less constructed to follow the classical pattern and to reinforce the dominant social codes within the home and school” (Zipes 34).

Fairy tales have by no means been left to gather dust in the 18th century; on the contrary, they heavily populate the art, literature, and media of contemporary culture in the form of retellings. Most well-known in the genre of fairy tale retelling is, of course, Disney films’ interpretation of classic tales, which have been heavily edited and “purified” of most of the more violent or questionable aspects of the original tales. Fairy tale retellings extend far beyond the rose-colored reach of Disney, though, and have been taken up as a narrative art form, appearing again and again in literature and art throughout the ages. The study of fairy tales and folklore provides insight to the norms and values of a culture, especially through analysis of the morals being advertised in different tales. Studying the ways in which fairy tales evolve over time and across cultures functions as a means of understanding the evolution of art and the ways in which contemporary culture interacts with tradition. Fairy tales that are retold inevitably evolve from telling to telling—in an incalculably vast game of cultural “Telephone”—and this evolution serves as invaluable evidence of changes in values, morals, and rhetorical practices. The retelling

of a fairytale serves as a sort of time capsule, taking a commonly known plot structure and shaping it to highlight the values and norms of the era in which it is being told.

Perhaps what makes fairy tales so prevalent across different eras is that most tales are a template of sorts—a general plot and cast of stock characters that then are easily fleshed out through the act of retelling. This template form then also has the potential to lend itself to expressing the updated moral messages of shifting eras. As Maria Tatar notes,

All printed fairy tales are colored by the facts of the time and place in which they were recorded. For this reason, it is especially odd that we continue to read to our children often without the slightest degree of critical reflection unrevised versions of stories that are imbued with the values of a different time and place. (*Off With Their Heads* 19)

This quality re-emphasizes the importance of fairy tales in contemporary culture. Because the original tales are so often steeped in harmful misogynistic or oppressive morality, the act of retelling fairy tales from an alternate perspective serves to subvert this toxic didacticism and act as a form of reclamation; reclaiming a canon of culture by telling it from an oppressed perspective reenters that voice into the cultural schema on its own terms and under its own power.

This essay is an exploration into the evolution of the didactic elements of fairy tales, as well as the ways in which that harmful didacticism might be subverted or re-envisioned. As such, I have chosen to focus my analysis on Charles Perrault’s “Bluebeard” for the ways in which female disobedience, curiosity, and autonomy are treated within this tale in relation to its instructive qualities. “Bluebeard,” like so many fairy tales, is a tale rich in moral lessons that are rooted in violence and punishment, featuring a central antagonist or oppressive force in the form of a malicious parental figure—a figure who is only overcome by means of extreme violence. In this sense, “Bluebeard” presents an extremely high stakes scenario, one of life and death wherein

the fate of a young woman hangs in the balance, and as such its moral implications would seem to boast a similarly dire gravity. Though many fairy tales are geared towards very young children, the fears and morals being addressed in “Bluebeard” are aimed more towards girls approaching adolescence, at the opposite end of the spectrum of childhood. The tale is centered around the various perils associated with entering society, leaving the home, and getting married, and its instructional qualities are centered around teaching adolescent women how to behave in each of these situations.

This essay endeavors to interpret the ways in which the act of reclamation functions in retellings of “Bluebeard” by analyzing the works of critically acclaimed feminist writers Margaret Atwood and Angela Carter. Because “Bluebeard” is a female-oriented cautionary tale featuring violence against women as an integral part of its narrative, the act of retelling this misogyny-laden tale through a feminist lens is especially important for its perpetuation in the cultural canon.

CHARLES PERRAULT’S “BLUEBEARD” (1697)

Perrault’s “Bluebeard” tells the tale of a wealthy aristocrat who convinces the daughter of a respectable woman to marry him despite having an unfortunate blue beard. He promises his new wife control of all his fortune with only one caveat: not to open one particular door in his castle. When Bluebeard leaves the castle, his wife immediately disobeys him. She finds that behind the forbidden door are the dead bodies of Bluebeard’s previous wives—a fact that is revealed in an offhand parenthetical aside:

She began to realize that the floor was covered with clotted blood and that the blood reflected the bodies of several dead women hung up on the walls (these were all the women Bluebeard had married and then murdered one after another). (Perrault 145)

Bluebeard’s wife drops the key to the forbidden room in a pool of blood, and the key is irrevocably stained. The bloodstained key

alerts Bluebeard to his wife's transgression, and he prepares to kill her as punishment; however, she is saved when her brothers—summoned by their sister, Anne—kill Bluebeard at the last second. Maria Tatar cites “Bluebeard” as a “story about transgressive desire, as a text that enunciates the dire consequences of curiosity and disobedience” (*Classic Fairy Tales* 139). The plot is centered around both the violation of a prohibition—opening a forbidden door—and the repercussions for that disobedience, and it initially seems logical that an instructional tale intended for children should warn against the perils of disobeying rules.

However, the didactic implications of “Bluebeard” are far more menacing than simply encouraging children to mind their parents' rules. There is a distinct and undeniable focus on *female* disobedience as transgressive and dangerous. As Perrault is so kind to remind us,

Curiosity, in spite of its many charms,
Can bring with it serious regrets;
You see a thousand examples of it every day.
Women succumb, but it's a fleeting pleasure;
As soon as you satisfy it, it ceases to be.
And it always proves very, very costly. (148; my emphasis)

Curiosity seems to be equated with agency in this model of thinking, condemning women not only for having curiosity but also for having the capacity to act on that curiosity, ultimately leading to damnable disobedience. However, curiosity exists on a troubled plane in Perrault's “Bluebeard.” Although it is curiosity that sends the other wives to their grave, there is something self-preserving in the final wife's curiosity; it is because of her curiosity that she discovers her husband's secret and, in the end, is spared the same fate. However, Perrault ignores this logic, and the entire tale is oriented around condemning female curiosity of any kind because it purportedly “[c]an bring with it serious regrets.” As Maria Tatar observes, “Rather than celebrating the courage and wisdom of Bluebeard's wife in discovering the dreadful truth about her husband's murderous deeds, Perrault and other tellers of the

tale often cast aspersions on her for engaging in an unruly act of insubordination” (*Classic Fairy Tales* 142).

The conflict inherent in the moral lesson of “Bluebeard” is that curiosity may either save or end your life. The determining factor then, it would seem, is whether or not one has a pair of heroic brothers to come to the rescue. In the end, Bluebeard’s wife is saved from execution by Sister Anne and their two brothers, who “plunged their swords into [Bluebeard’s] body and left him for dead” (Perrault 147). Bluebeard’s wife at least has the cunning to prolong her execution by feigning piety and begging for time to say her final prayers, but ultimately it is the brothers who are lauded as the heroes of the tale, again reiterating a self-righteously gendered dispersal of agency. It is also worth mentioning the importance of Sister Anne’s role in the course of events; largely unmentioned aside from her appearance in the beginning of the tale as being one of “two daughters who were perfect beauties” (144), if it were not for her summoning their brothers, it is likely Bluebeard’s wife would not have escaped with her life. Despite this, the heroic spotlight of the tale remains trained on the brothers while the moral lesson of the tale hones in on the repercussions of disobedience.

Interestingly, both Maria Tatar and scholar Bruno Bettelheim equate the brothers’ timely rescue with an anxiety surrounding marriage and leaving the home (*Classic Fairy Tales* 139-140; Bettelheim 306). It does seem contrary to general fairy tale plotlines that the heroine’s brothers should come to her rescue instead of a handsome prince or even a “very worthy man, who banished the memory of the miserable days she had spent with Bluebeard” (Perrault 148), such as the man she eventually marries. Despite the distinct value placed on the safety of home—and, by default, on childhood—“Bluebeard” is a transitional tale focused on the movement from youth to adulthood. Whereas many fairy tales are centered around the perils adults present to children, “Bluebeard” focuses on the perils of *being* an adult, and its instructional quality is thus centered around how women might conduct themselves as married adults to avoid the “serious regrets” brought about by indulging in curiosity.

Inherent, too, in the moral quality of “Bluebeard” is a

distinct warning against the perils of superficiality, and from the outset of the tale is a focus on the shallowness of our unnamed female protagonist. She initially cannot find it within herself to overcome her disgust with his “blue beard ... [which] made him look so frightful that women and girls alike fled at the sight of him” (144). However, this reluctance is dissipated when Bluebeard hosts a series of extravagant parties, and the protagonist realizes the extent of his wealth. If Bluebeard’s wife hadn’t been lured in by her gluttonous desire for Bluebeard’s money and worldly possessions, perhaps she wouldn’t have “[begun] to think that the beard of the master of the house was not so blue after all and that he was in fact a fine fellow” (144). The aspect of the titular blue beard itself seems to suggest a fixation on the superficial; the beard is never explained as anything except a “misfortune” (144), and it functions in such a way that it emphasizes the woman’s fixation on material gain. She only accepts Bluebeard’s hand in marriage when his wealth proves more attractive than his beard.

In this way, Bluebeard’s wife is characterized from the outset as being superficial and fixated on material wealth, making the didactic quandary of the tale equally an issue of both the pitfalls of female curiosity and the moral fragility of women. This factor is especially emphasized by the richness of Bluebeard’s home, which is so lavish and opulent that one “could not find words to describe the number and beauty of the tapestries, beds, sofas, cabinets, stands, and tables” (145). The temptation of curiosity is pitted against the temptation of material wealth, essentially rendering Bluebeard’s wife doomed to some failing, whether she fall prey to curiosity or gluttony. As Jack Zipes comments,

Perrault’s fairy tales, which “elevate” heroines, reveal that he had a distinctly limited view of women. His ideal “*femme civilisee*” of upper-class society, the composite female, is beautiful, polite, graceful, industrious, and properly groomed and knows how to control herself. ... The task confronted by Perrault’s model female is to show reserve and patience. (Zipes 40)

The issue of “know[ing] how to control herself” is especially apparent in “Bluebeard,” whose heroine’s “temptation was so great she was unable to resist it” (Perrault 145) and who nearly dies for the sake of her uncontrollable curiosity. The main moral message being advertised in “Bluebeard” seems to be that a lady must be both in control of herself and *under* the control of her husband for a marriage to be successful.

An extension of this message is the distinctly paternalistic quality of Perrault’s Bluebeard, who doles out commands, punishments, and promises of rewards as a means of exerting control over his wife, much like how some models of parenthood operate. The language he uses in his command not to open the door is patronizing, especially in light of the fact that he offers her a reward of jewels and treasures if she is obedient, as if she were a poorly behaved child. Further, he offers no reasoning behind why she shouldn’t open the door, saying only, “Open anything you want. Go anywhere you wish. But I absolutely forbid you to enter that little room, and if you so much open it a crack, there will be no limit to my anger” (145). The cultural context of the tale would lend to the understanding of a wife as her husband’s property, yet in “Bluebeard” particularly there is a distinct depiction of marriage (for a woman, at least) as a transition from one form of parental control to another. Drawing from Tatar’s and Bettelheim’s analysis of “Bluebeard” as a story about marriage anxiety, I would argue that it is also a tale that demonstrates the way in which a woman is passed from her parents’ control to her husband’s control upon being married, making commentary on the potentially deadly results of not obeying one’s possessor.

As a basis for fairy tale retellings, “Bluebeard” presents an especially challenging narrative because of how inherently misogynistic and violent it is. It is difficult to reclaim a story under feminist terms wherein violence towards women is the one essential plot component, yet the narrative is not totally impenetrable. The relative simplicity with which Perrault presents gender roles and power dynamics within his tale lends itself naturally to being subverted through retellings, though perhaps not in the ways one would immediately expect. Both Angela Carter and Margaret

Atwood resituate Perrault's tale in contexts that are complex and multilayered, challenging not only our notions of gender politics in literature but also the subversive art of fairy tale retellings as a genre.

ANGELA CARTER'S "THE BLOODY CHAMBER" (1979)

Premiere in the genre of fairy tale retelling is Angela Carter, whose collection of short stories *The Bloody Chamber* was groundbreaking in its unflinching subversion of traditional tales. However, *The Bloody Chamber* was not unanimously upheld as the pinnacle of feminist fiction upon its release; the stories within the collection largely abide by the "inherently misogynistic narrative structures" of the original tales (Gamble 20), which many scholars argue are impossible to reclaim under a feminist lens without fundamentally changing them. Essentially, Carter identifies the problematic aspects of the original tales and magnifies them in her retellings, which does seem to be paradoxical when viewed through a feminist lens.

However, I would argue in favor of those who view Carter's work as challenging—rather than embracing—our notion of gender politics in such limited terms as dichotomous power structures comprised of male versus female. By exaggerating the misogynistic aspects of the original tales and complicating them in her retellings, Carter is effectively taking the issues of a different era and reiterating them in contemporary culture as a means of emphasizing that those issues still exist. Further, if what is expected of a "feminist" or subversive retelling of a fairy tale is that the narrative structure is subverted simply so that the power dynamics shift in favor of the female character, then this is a problematic way of understanding feminist literature. In reality, misogyny most often manifests in situations where there is no means of simply flipping power dynamics, and by operating under the power structures of the original tales—which are undoubtedly "inherently misogynistic narrative structures"—Carter is making commentary on the reality of misogyny and oppression in contemporary culture. This is the subversive work of *The Bloody Chamber*, then—bringing the real-world relevance and impact of fairy tales

into contemporary culture through the act of representation and commentary on social ills.

However, many of the subversive aspects of *The Bloody Chamber* are present in the more drastic changes Carter makes in the stories. The titular story of the collection is Carter's "Bluebeard" retelling, which largely abides by the same narrative structure of Perrault's tale, aside from some small yet significant changes. "The Bloody Chamber" is written in the first person point of view from the perspective of the young woman who marries the Bluebeard character of the tale, the Marquis, and the act of giving Bluebeard's wife the role of the narrator is subversive in and of itself. A large part of the issue with Perrault's original "Bluebeard" is the patronizing tone with which Bluebeard's wife is described; she is consistently characterized as a child with no redeeming qualities—or any notable qualities at all, really. By moving the narrative into the first person point of view, the narrator is given depth, texture, and motivation on her own terms instead of having character traits ascribed unto her, such as in Perrault's tale.

Secondly, Carter introduces an entirely new character into the narrative, who further complicates the story and its interpersonal dynamics. The narrator herself is an esteemed piano player, and upon her move into the Marquis' castle, a piano-tuner from the neighboring village is hired onto the staff for the upkeep of her instrument. The piano-tuner, Jean-Yves, is a young blind man who, despite his submissive timidity, befriends the narrator and stands by her even when the Marquis prepares to behead her at the end of the story. Jean-Yves adds an interesting element to the narrative because he represents a direct parallel to the Marquis; whereas the Marquis is violent, powerful, and domineering, Jean-Yves is near-helpless, mild, and, as the narrator says, "to see him, in his lovely, blind humanity, seemed to hurt me very piercingly, somewhere inside my breast" (Carter 32). The piano-tuner represents a secondary side of masculinity, one which the narrator's naivety and inexperience has made her unaware of, as well as an alternate side of the male-female power dichotomy in which the female possesses agency and power over the male in the most basic terms as physical ability. Interestingly, once the narrator reveals the

Marquis' murderous secret to Jean-Yves, she begins referring to the piano-tuner as "my lover" (38), effectively claiming him as her own with seemingly no real exchange of intimacy. The narrator's relationship to Jean-Yves is a reflection of her relationship with the Marquis only with the power dynamics reversed, indicating an awareness of the problematic aspects of the original tale and a purposeful subversion of those aspects.

There is also an undeniable relationship between age and power in the narrator's interactions with both the Marquis and Jean-Yves, which functions as an extension of these reversed power dynamics. The narrator reflects that the Marquis "was older than I. He was much older than I; there were streaks of pure silver in his dark mane" (Carter 8), and repeatedly throughout the story he refers to her with infantilizing language that is both demeaning and sexually charged. For example, the narrator comes across a volume of violent pornographic images in the Marquis' library, and when he discovers her looking at them he asks, "'Have the nasty pictures scared Baby? Baby mustn't play with grownups' toys until she's learned how to handle them, must she?'" (17). This interaction abruptly leads to his forcing her up the stairs and raping her,¹ after which he asks, "My dear one, my little love, my child, did it hurt her?" (18). The narrator realizes that "it must have been my innocence that captivated him ... To know that my naivety gave him some pleasure made me take heart" (19); however, the root of the Marquis' pleasure appears to lie in the sense of power he derives from her youth and innocence, which is emphasized by the ways in which he so derisively infantilizes and demeans her.

¹There is some ambivalence regarding this moment in the story as to whether or not the Marquis and the narrator's consecrating their marriage should be considered rape. However, I would argue that there is an undeniably violent, demeaning manner in which the Marquis interacts with the narrator, such as how "he laughed at me aloud" and "snatched the book from my hands," leading to the moment when "a dozen husbands impaled a dozen brides" (Carter 17) in their mirrored bedroom. There is no indication of consent or pleasure on the narrator's part, and despite that in the antiquated context of the story's setting it is the expected "right" of a man to do what he wills with his wife, I believe it is essential that a modern reading and understanding of this scene situates it undeniably in the context of rape.

This relationship between age and power functions interestingly in its translation to the narrator's relationship with Jean-Yves, whom she acknowledges as "scarcely more than a boy" (32). It would seem that there is some evidence of patterns of abuse being internalized and then enacted from character to character; the Marquis derives some sense of superiority over the narrator because of his age, wealth, and power, and it is arguable that the narrator experiences the same sort of superiority over Jean-Yves. Her elevated status as the Marquis' wife gives her authority over the piano-tuner, who is technically her employee, and she uses this social agency to command him to obey her. Further, there is some element of disguise or deceit being equated with power; the narrator considers the Marquis' "strange, heavy, almost waxen face" like a mask (8), and she never sees any evidence of her husband's true face beneath that facade. In a similar sense, the piano-tuner's blindness functions almost as a means for the narrator to maintain a similar disguise; in the story's postscript, the narrator reflects that she is glad the piano-tuner is blind because he cannot see the mark on her forehead that was left from the blood-stained key, "not for fear of his revulsion, since I know he sees me clearly with his heart—but because it spares my shame" (41). Both the narrator and the Marquis utilize a facade that hides their guilt and gives them an extension of power and knowledge over their significant others, and it is in this sense that I read the patterns of abuse being transferred down the line from character to character.

What is perhaps the most notable change Carter makes in her "Bluebeard" retelling, though, is that when the Marquis is about to kill the narrator, her mother arrives in the nick of time to save her daughter instead of leaving the rescue to a pair of heroic brothers:

On her eighteenth birthday, my mother had disposed of a man-eating tiger that had ravaged the villages in the hills north of Hanoi. Now, without a moment's hesitation, she raised my father's gun, took aim and put a single, irrefragable bullet through my husband's head.
(Carter 40)

The feminist aspect inherent in changing the brothers to the narrator's mother is obvious, but there is an underlying complexity in their relationship that is subtly present throughout the story. From the outset, there is a theme of mother-daughter competition—a prevalent theme in classic fairy tales—that is apparent first in the way the narrator describes her mother: “What other student at the Conservatoire could boast that her mother had outfaced a junkful of Chinese pirates, nursed a village through a visitation of the plague, shot a man-eating tiger with her own hand and all before she was as old as I?” (7). Though the narrator finds her mother's legacy impressive, the comparison to her own accomplishments at the end of the description draws a definite parallel between the two women and emphasizes a sort of resentment on the part of the narrator, especially when she reflects that “I could not say I felt one single twinge of regret for the world of tartines and maman that now receded from me as if drawn away on a string, like a child's toy” (12). The narrator does not love the Marquis but actively chooses to marry him, leaving behind her poverty-stricken home life and the “white, enclosed quietude of my mother's apartment” (7). In this sense, the narrator's decision to marry the Marquis is a means of escaping her mother's legacy and striking out on her own, and when she does return home in the end, she has accrued an impressive legacy of her own.

In addition to the recurring theme of mother-daughter competition is the theme of mother-daughter alliances being broken and replaced with male-female alliances. Female-oriented fairy tales often begin with the death of a mother, who is usually substituted with a wicked stepmother, emphasizing that the separation of mother and daughter is expected and integral to the plot of a fairy tale. This female alliance is then most usually broken in favor of a marriage—and always a heteronormative marriage at that. The fact that the narrator of “The Bloody Chamber” returns home to her mother at the end of the tale is perhaps one of the most subtly significant moves Carter makes in her retelling because it subverts the traditional expectation that once the mother-daughter alliance is broken it can never be fixed, only replaced. Not only does the narrator of “The Bloody Chamber” return to live

with her mother, she also brings Jean-Yves, the piano tuner, and the three of them form a matriarchal family unit.

However, it is not only in these changes that Carter envisions a feminist “Bluebeard”; I would argue that, in many ways, Carter entirely reinvents the cast of characters from Perrault’s original tale. The protagonist, for example, does not desire to open the forbidden door simply because she cannot control her curiosity, like Perrault’s heroine who was “so tormented . . . by her curiosity that . . . she raced down a little staircase so fast that more than once she thought she was going to break her neck” (Perrault 145). Instead, Carter’s protagonist methodically searches through her husband’s possession in an attempt to understand him as a person: “The significance of the possessions implied by that bunch of keys no longer intimidated me, for I was determined, now, to search through them all for evidence of my husband’s true nature” (Carter 24). Whereas Perrault presents curiosity as a trait that is morally reprehensible when in the possession of a woman, Carter takes that trait and gives it a meaningful foundation and motivation. In the same way, the greed that so significantly marks the heroine of Perrault’s tale is transformed in Carter’s retelling in such a way that the narrator reveals the poverty she and her widowed mother have lived in—“I, the little music student whose mother had sold all her jewelry, even her wedding ring, to pay the fees at the Conservatoire” (Carter 13)—which rationalizes her union with the Marquis more than simply making her desirous of worldly gain.

Another subversive characterization is the way in which the Marquis is described throughout the narrative, both in terms of line-level word choice and the narrator’s perception of him. In many instances, the Marquis is described in animalistic and inhuman terms—such as “dark, leonine” (8)—and his physical appearance is reiterated as being “waxen” or lifeless (8, 26). In another instance, the narrator reflects that “I know it must seem a curious analogy, a man with a flower, but sometimes he seemed to me like a lily. Yes. A lily. Possessed of that strange, ominous calm of a sentient vegetable” (9). It is in descriptions such as these that Carter is subverting the dynamics of Perrault’s tale on a line-level basis, reiterating and redirecting the objectification and gendered

language that so strongly mark the original tale.

MARGARET ATWOOD'S "BLUEBEARD'S EGG" (1983)

Margaret Atwood is well known for the implementation of fairy tales in her fiction, and more often than not, her presentation of those tales functions as a form of social commentary or as a means of subverting the original tales' moral messages. As Sharon Wilson says, "by revisioning fairy-tale intertexts in a postmodern manner, Atwood explores power and sexual politics in patriarchal society ... usually through the transformative and creative act of telling a story" (Wilson 98-99), and her stories are prime examples of fairy tale retellings functioning as a subversive art form. "Bluebeard's Egg," Atwood's "Bluebeard" reiteration, is a further removed version of the traditional retelling than "The Bloody Chamber" or other examples in the genre. Instead of simply retelling the story of "Bluebeard" through another lens or voice, Atwood takes the conceit of the plot and completely transposes it onto a different time, place, and cast of characters. "Bluebeard's Egg" takes place within a realistic, contemporary setting and focuses on one couple's troubled marriage—or, rather, focuses on the trouble one woman perceives to exist within her marriage. Sally, the protagonist, is deeply paranoid about her relationship with her husband Ed, and the majority of the narrative is centered around her thoughts and anxieties as she struggles to make sense of her place in her husband's life. For context, their marriage is given this rather compromising introduction:

Sally is in love with Ed because of his stupidity, his monumental and almost energetic stupidity; energetic because Ed's stupidity is not passive. He's no mere blockhead; you'd have to be working at it to be that stupid. ... It fills her with wonder that world can contain such marvels as Ed's colossal and endearing thickness. He is just so *stupid*. Every time he gives her another piece of evidence, another tile that she can glue into place in the vast mosaic of his stupidity she's continually piecing together, she wants to hug him, and often does; and he is so stupid he

can never figure out what for. (Atwood 157)

From the outset, “Bluebeard’s Egg” is troubling in its presentation of Sally and Ed’s relationship, especially when read through a feminist lens. Despite how enormously stupid she considers him to be, Sally is absolutely fixated on Ed, and this fixation is apparent in nearly every line of the story; every thought or action Sally makes is somehow linked to its effect on Ed. The story would by no means pass the Bechdel test,² and I would argue that it is easy to read “Bluebeard’s Egg” as problematic at the very least because of how toxic and manipulative a character the female protagonist is. What, then, are we to make of this apparently anti-feminist story from such a premiere feminist author as Margaret Atwood?

The story itself is very dense, and the fact that the characters’ roles are not immediately identifiable as having been transposed from Perrault’s “Bluebeard” only serves to further complicate the narrative. Understanding the story as a true “Bluebeard” retelling calls for readers to match characters from the original tale onto the retelling. A clever maneuver on Atwood’s part is that she creates a subplot within the story that functions as a sort of meta-narrative; Sally enrolls in a creative writing night course and is assigned to write a retelling of “Fitcher’s Bird”³ that is “set in the present and cast in the realistic mode” (Atwood 171)—just as “Bluebeard’s Egg” is. This meta-narrative serves as a sort of commentary on “Bluebeard’s Egg” as a “Bluebeard” retelling, especially as Sally attempts to transpose the original tale onto hers and Ed’s life:

² A means of measuring how frequently female characters in a work of fiction talk about something that does not involve a male character.

³ “Fitcher’s Bird,” recorded by the Brothers Grimm, is a lesser-known version of the “Bluebeard” tale-type that follows more or less along the same plot line as Perrault’s “Bluebeard,” one difference being that instead of a key being the object that reveals the wife’s transgression, it is an egg. (Thus, Atwood’s title, “Bluebeard’s Egg.”) Another important difference between Perrault’s “Bluebeard” and “Fitcher’s Bird” is that in “Fitcher’s Bird” the wife saves herself and her sisters, using her cleverness to escape death rather than needing to be saved by her brothers.

The great temptation is to cast herself in the role of the cunning heroine, but again it's too predictable. And Ed certainly isn't the wizard [Bluebeard]; he's nowhere near sinister enough. If Ed were the wizard, the [forbidden] room would contain a forest, some ailing plants and feeble squirrels, and Ed himself, fixing them up; but then, if it were Ed the room wouldn't even be locked, and there would be no story. (173)

Later, Sally realizes that "Ed isn't the Bluebeard: Ed is the egg. Ed Egg, blank and pristine and lovely" (174), which raises the point that the characters' roles are up to debate, even to the characters themselves. Because Atwood so baldly puts forth the question of who each of her characters represents, we are automatically drawn to question Sally's role in the context of the original tale. It seems she could represent Bluebeard's wife, or "the cunning heroine," who is given the egg to test not only her fidelity but also her cleverness; if Ed is to be read as the egg, then Sally being read as the wife whose burden is to keep the egg from being tainted by disloyalty would re-emphasize the theme of betrayal and infidelity apparent throughout "Bluebeard's Egg." However, Sally could also be read as the Bluebeard of the story, fixated on finding any trace of disloyalty evident in her "Ed Egg," which would make the title "Bluebeard's Egg" more potent for its emphasis on Sally's unhealthy possessiveness.

A large factor at play within the narrative that is essential to understanding how the roles of the characters relate to the original tale is a distinct sense of misunderstanding between Sally and Ed. Sally's insistence on Ed's stupidity, which is reiterated throughout the story, can be interpreted as a desire to control Ed in some way, especially when it is revealed that Ed is a heart surgeon and by no means as stupid as Sally claims. This desperation for some semblance of control over Ed becomes especially apparent throughout the narrative as it is revealed how little she understands Ed as a person. She reflects at one point that "in her inner world is Ed, like a doll within a Russian wooden doll, and in Ed is Ed's inner world, which she can't get at" (169). The constant refrain of Ed's

stupidity is a manifestation of Sally's insecurity over not being able to know Ed fully and thus not be able to control him fully. The crux of Sally's anxiety appears near the end of the narrative when, during a dinner party, she believes she witnesses Ed groping another woman. This leads Sally into a spiraling panic, and she wonders if she "has been wrong about Ed, for years, forever. Her vision of Ed is not something she's perceived but that's been perpetrated on her, by Ed himself, for reasons of his own. Possibly Ed is not stupid. Possibly he's enormously clever" (177).

If we are to accept Sally as representing the Bluebeard character in "Bluebeard's Egg," then her panicked realization of Ed as having the potential for malice is akin to Bluebeard having the tables turned on him at the last moment when his wife's brothers kill him; as Angela Carter puts it, "the king, aghast, witnesses the revolt of his pawns" (Carter 39). The possibility that Ed is not as stupid as Sally has convinced herself he is disturbs her because it would disrupt the vision she has created of him in her mind as a half-person, an object of sorts. This, then, is where Atwood does not fail us in her reputation as a feminist author. What is the largest part of the misogyny inherent in Perrault's "Bluebeard" is the way in which Bluebeard objectifies and infantilizes his wife, as discussed in the sections above, and Margaret Atwood has effectively reversed these roles in "Bluebeard's Egg." Sally's constant references to Ed as stupid, a child, or an egg embody the same oppressive parental bent that the original tale has, but in Atwood's telling it is the wife who objectifies and oppresses the husband. This is the epitome of subversion: taking something once understood as a normalized form of oppression and reversing those roles.

The story is complicated by Sally's realization that Ed has the potential for something other than what she expects of him; she realizes, finally, that "the egg is alive, and one day it will hatch. But what will come out of it?" (Atwood 178). Her understanding of him as an egg, "blank and pristine and lovely" (174), emphasizes how firmly she considers him to be nothing but an object, incapable even of expression, which is similar to the presentation of the wife in Perrault's original "Bluebeard," who has no defining characteristic aside from her deadly curiosity.

This, then, is another aspect of fairy tale retellings as a genre; because fairy tales were largely used for instructional purposes, the characters—especially the female characters—have little to no characteristics other than what is instrumental in moving the plot forward. They function simply as stock characters, and part of the subversive work of feminist fairy tale retellings is giving characters fully formed personalities and fleshed-out traits that defy the expectations set forth by stereotypes and tradition. Margaret Atwood fully embraces this challenge by not only giving her female protagonist a fully fledged character but also by pointing out that the male character, who is consistently objectified throughout the story, also has the capacity for full personhood. Thus, the theme of paternal oppression and objectification present in the original tale is not only reversed in its gendered roles but it is also subverted in such a way that even the oppressed is given some agency over the oppressor.

What, then, are we to learn from Atwood's updated presentation of Perrault's moral tale? Part of the brilliance of "Bluebeard's Egg" as a feminist retelling is that it is settled within such a compromising and dense narrative; Sally is an unemployed housewife whose only concern is her ignorant and unattending husband, none of which is immediately indicative of a feminist text. Yet both the setting and characters' roles rather cleverly call into question themes such as domesticity, possession, and spousal abuse—all of which are present in Perrault's "Bluebeard"—and situate them within a contemporary context. As Maria Tatar aptly questions, "How do we preserve the the fairy-tale canon even as we divest it of the 'wisdom' of another age, of cultural constructs that are irrelevant or inappropriate for the child to whom the tale is read? One obvious answer is to rewrite the stories so that they are closer to our own time and place" (*Off With Their Heads* 19). Although "Bluebeard's Egg" is neither an exactly reiterated "Bluebeard" retelling nor intended for children, Atwood does embed the original tale within her retelling by having Sally recite the story as she remembers it, effectively both resituating the story within a modern context as well as preserving the original tale almost verbatim. This, then, is where the didactic quality of

“Bluebeard’s Egg” comes into play: by presenting the original tale alongside her retelling, Atwood draws parallels throughout the narrative that present the moral issues of the original tale within a modern context and make the narrative more accessible.

As Atwood presents it, “Bluebeard” in a modern context is a cautionary tale warning against the perils of obsession and possessiveness, which I would argue is a direct feminist update of the original tale’s moral structure. As Sheldon Cashdan points out, “though [‘Bluebeard’] is ostensibly about killing, its underlying meaning centers on what it means to treat human beings as objects, as things to be collected much as one collects art, jewelry, and other valuables” (191). Perrault’s Bluebeard is a collector of women who derives power from his possessiveness, and in a sense this is the same driving force that makes Sally simultaneously so anxious and dismissive of Ed. Both Atwood’s Sally and Perrault’s Bluebeard underestimate their spouses and seek to control them in various ways, and their objectification proves to be their downfall in both cases.

CONCLUSION

If the abundance of films, television shows, books, and stories based on classic fairy tales that are circulating in pop culture today are an indication of anything, it is that fairy tales are an inseparable part of contemporary Western culture. Whether through Disney or by other means, the fairy tales of the 18th century have been canonized and preserved to the point that they actively imbue and affect our notions of story and narrative structure. For generations, our understanding of plot—of a “story”—has followed that a man marries a woman and they live happily ever after, with no room for gender non-normativity, poverty, disability, or racial diversity. It is a deeply troubling issue that the way we as a culture understand “happily ever after” is only through the lens of heteronormative marriage. As Maria Tatar notes, “A story that has been brought ‘up-to-date’ does not necessarily give us an interpretation that is more pedagogically sound or psychologically true” (*Off With Their Heads* 20), and it is because of this fact that the creation and circulation of consciously

subversive fairy tale retellings are an essential component of progress.

One of the factors that drew me to “Bluebeard” originally is that it has neglected to become canonized in Western culture in the same way that other fairy tales such as “Cinderella” or “Snow White” have been. “Bluebeard” relies heavily on violence and murder as integral plot points, and so it is no wonder that Disney has not leapt at the chance to take this tale up as their own, which explains why much of the perpetuation of this story in particular has been through the work of writers such as Margaret Atwood or Angela Carter. Though “Bluebeard” is likely better left in the realm of adult literature, I would argue that the tale deals with issues that are still relevant and necessary for exploration. Perhaps Atwood’s method of transposing “Bluebeard” onto a modern setting as a means of making commentary on domestic abuse is the model that best utilizes fairy tale retellings as a subversive art form; if we are to reiterate fairy tales under the terms of a different era, then it seems that situating them in such a way that they explore relevant, contemporary issues is the surest path to giving classic tales significance and impact in modern culture. The fact that fairy tales continue to hold a significant place in the minds and hearts of contemporary society emphasizes how strongly they affect us in real and lasting ways. Breaking down the outdated narrative structures and moral codes imbued in these stories through retellings is essential in reclaiming them under more progressive, inclusive, and hopeful terms.

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Untitled
by Ruby Shearon

Separation, Communication, and Devotion: An Exploration of Motherhood Behind Prison Walls

Abstract:

The United States has one of the highest prison populations in the world, with more women incarcerated today than ever before. The majority of these women are mothers. Research on mothers in prison points to the constraints of maintaining communication and connections with children, and indicates that prison limits mothers' ability to parent (Baldwin 2018; Baunach 1985; Enos 2001). Incarcerated women are separated from their children and forced to parent over the phone, through the mail, and during visits. This mixed-methods research uses a survey and interviews to examine how women experience and enact motherhood in prison at Swannanoa Correctional Center for Women in Black Mountain, NC. Data focus on the ways that women navigate and maintain relationships with their children, the constraints of mothering from prison, and the effects these have on women and their children. Using Sharon Hays' concept of Intensive Mothering, this research explores the impacts of dominant constructions of motherhood on women who cannot live up to these expectations and are often deemed deviant mothers. Findings indicate that prison puts significant constraints on women's ability to mother and the experience is deeply emotionally painful. Despite the disproportionate incarceration of low-income women, and unrealistic expectations placed on mothers, many women indicated feelings of personal responsibility and negative perceptions of themselves as mothers as a result of their incarceration. However, women also expressed agency in performing their mothering roles within the constraints of prison, and described motherhood as a positive element of their identities and experiences in prison.

Anna Keeva | Sociology/Anthropology



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INTRODUCTION

Kendra was arrested when her daughter was just 15 months old, slept with her in bed every night, and was still breastfeeding. They were living with her husband and son in an eighteen-wheeler. She was arrested, she told me, because her husband killed their son. She has struggled over the years to build a relationship with her daughter, who is now almost 14 years old and calls Kendra's mother "mom." Kendra explained that in many ways she cannot build a mother-daughter relationship while separated from her daughter. She asked, "How do you create a relationship with someone you don't really know?"

The United States has one of the highest rates of incarceration of any nation in the world (World Prison Brief). Women make up a larger proportion of the U.S. prison population today than they have at any other time in history (Bureau of Justice Statistics 2010). In 2015, over 60% of women in state prisons had at least one child under the age of 18 (Sentencing Project 2015). Today, more than 2.2 million people are incarcerated in the U.S. The increase in women's incarceration is even more dramatic, and women represent the population with the fastest rate of growth of imprisonment, rising 700 percent between 1980 and 2014, resulting in 215,332 women in prison in 2014 (Sentencing Project 2015).

Incarcerated mothers face enormous constraints to their ability to mother. Their communication with their children is limited to interaction over the phone, through letters, and for some, short visits. Limited funds and geographical distance are only two of the many obstacles mothers face in maintaining contact with their children. They aren't present for their children's everyday lives and must parent from within prison walls.

Mass incarceration of women not only affects the women but also the children who rely on them for care and love, and their lives are often severely disrupted while their mothers are behind bars (Bureau of Justice Statistics 2010). Incarceration of mothers creates instability in the lives of their children and often leads to emotional challenges and placement in unsafe situations, which can create a cycle of abuse and crime for children (Marcus-Mendoza and Sharp 2001).

In the spring and fall of 2017, I participated in two classes at Swannanoa Correctional Center for Women (SCCW) in Black Mountain, NC through the Inside Out Program, an educational partnership between Warren Wilson College and SCCW. Swannanoa Correctional Center is a minimum-security state prison, which is five miles down the road in Black Mountain and houses up to approximately 360 women. It is an “honor grade” facility, meaning that all women incarcerated there have come from other prisons where they received honor status as a result of their behavior and time left in their sentences. Women are sent to SCCW from all over North Carolina, and the prison houses women convicted of all sorts of crimes. The racial demographics of the prison are quite different from the national prison demographics. Currently, 82% of the women at SCCW are white, 17% are black, 1.8% are Native American, and 0.3%, or one person, is Asian.

THEORETICAL FRAMEWORK

Separation from children is only one way that motherhood affects women in prison. These incarcerated mothers are also subject to judgment from the broader society based on their identities as mothers. Women are evaluated via dominant ideologies of motherhood that pervade society and set strict expectations for mothers. Sharon Hays coined the term “Intensive Mothering,” in 1996, and the concept continues to be used widely to describe the form of mothering considered ideal in the US. Intensive mothering is often posited as the standard according to which mothers are judged by others and by themselves. Intensive Mothering requires that women be completely engaged in mothering work, meaning they must be constantly physically and emotionally present for their children. Mothering is promoted as women’s highest priority, and women are expected to *want* to be mothers and to hold motherhood as central to their identities.

It is physically impossible for women in prison to live up to these expectations. Howard Becker’s Labelling Theory explains that deviance is not inherent to any act, but that people are labelled deviant depending on the social context in which they act. Mothers in the U.S. are often labelled deviant when they fail to adhere

to the expectations of Intensive Mothering. Illegal activity and incarceration do not fit with these expectations, and often lead to women being labelled deviant or bad mothers, a label that is often internalized and can affect women's sense of self and their identities as mothers. Still, while women construct their identities in the context of these dominant constructions of motherhood, social ideals do not determine *exactly* how mothers will perform motherhood or understand their experiences as mothers. Mothers in prison, like all mothers, possess agency. Anthony Giddens' Theory of Structuration looks at social systems as produced by both the structures of society and agents, or the individuals within a society. While women who are constructed as deviant mothers understand their identities and value themselves in a context shaped by dominant ideologies, which deem them "bad mothers," they can also use their agency to push back against those expectations, which may influence how they enact and understand their roles as mothers.

STATEMENT OF PURPOSE AND RESEARCH QUESTIONS

There is limited research on experiences of motherhood for women in prison and their maintenance of relationships with their children, especially that which specifically focuses on the effects of dominant constructions of motherhood on their experiences and identities. There is also limited exploration of the role of mothers' agency in the ways they enact and understand motherhood in prisons.

The purpose of this mixed-methods study is to explore the ways that women in prison experience motherhood, focusing specifically on how they maintain and navigate relationships with their children, the challenges they face, and how they deal with these challenges. Through interviews and surveys with women at Swannanoa Correctional Center for Women, this study highlights the impacts of dominant constructions of motherhood on mothers who deviate from those norms, while also pointing to the agency they employ to maintain relationships with their children and construct their identities as mothers.

Through data collected at Swannanoa Correctional Center

for Women, this research seeks to consider the following questions:

1. How do women experience motherhood at Swannanoa Correctional Center? How is this affected by dominant constructions of motherhood?
2. How do mothers incarcerated at Swannanoa Correctional Center maintain and navigate relationships with children while in prison?
3. What challenges do women at Swannanoa Correctional Center face in maintaining and navigating relationships with children from prison?
4. What agency do they possess in dealing with these challenges?

METHODOLOGICAL APPROACH

In order to explore these questions, I used mixed-methods research, which was approved by the Warren Wilson IRB, consisting of a survey and interviews. The survey was the first step in my data collection process. Because of the nature of SCCW, in combination with the extra protections provided to people in prison in conducting research, my sampling method was limited to creating flyers that described the research, which were posted in the housing buildings at the prison. I received help with this process from both Rob Phillips, the Education Director at SCCW and my main contact at the prison, and Duncan Tam, one of the social workers. The flyers encouraged women who were interested in participating to send a request for the survey to Duncan Tam, who provided each with a stamped envelope addressed to me with instructions. Surveys focused specifically on communication with children and included eighteen questions—fourteen closed-answer questions, and four open-ended questions. In the surveys, I asked about methods and frequency of communication, the ease with which mothers communicate with their children, the challenges women face in communicating with their children, and the ways that they deal with these. The last question on the survey asked each respondent if they would like to participate in a follow-up interview, and if so, to provide her full name for contact.

NAVIGATING MOTHERHOOD BEHIND PRISON WALLS: FINDINGS

Seventeen people responded to my survey and all but one wished to be interviewed. I conducted interviews with all sixteen who indicated interest. Fourteen of the women identify as White and three identify as Black or African American. Two respondents have one child, five have two children, eight have three children, one has five children, and one has eight children. Their children range in age from three months to 40 years old, with 68 percent of them under the age of eighteen. Fourteen of them were in prison at least one time previously, two of them are in their first sentence currently, and for one of them I do not have that information. Current sentences range in length from sixteen years to less than one year, 47 percent of those being less than one year.

Kendra, who has been in prison since her thirteen-year-old daughter was fifteen months old, described the effect incarceration has had on her connection to her family. She described the separation from her daughter as being “like when someone passes away... [My daughter] keeps me alive through stories and pictures.” Phone calls and very infrequent visits make it extremely difficult for Kendra to maintain a close relationship with her daughter and she experiences a lot of pain in knowing what she is missing. She laments her inability to be there for her daughter and expresses guilt for having taken actions that resulted in her getting locked up. Still, Kendra does what she can to be a mother as much as possible. She crochets blankets for her daughter and learns about her daughter’s life from her frequent conversations with her own mother. She is still a mother, but prison walls have stolen her ability to mother in the way that she did on the outside, and created a chasm between her and her daughter that fills her with worry over the future of their relationship. While most of the women I interviewed were different from Kendra in that they spent significant portions of their children’s lives outside of prison, in many ways Kendra’s experience is similar to others’.

“I feel like a part-time mom and it SUCKS.”

My most important overall finding is that incarceration puts enormous constraints on my respondents’ abilities to mother, and each described mothering from prison as an extremely difficult task. Many agreed with Camille’s assertion that “trying to be a mom from here is extremely hard.” While all of the women expressed that their relationships with their children are incredibly important to them, for the most part their roles in these relationships are not what they would like them to be. As Marina explained, “I feel like a part-time mom and it SUCKS.”

Some women still play a significant role in their children’s lives while in prison, but see it as a greatly diminished mothering role. This is reflected in Natalia’s experience; she stated, “You definitely can’t parent from inside here...You can give them love, but you can’t parent from in here.” The women’s ability to remain connected is largely dependent on the caregivers of their children, some of whom greatly help facilitate contact, and others of whom intentionally limit contact, in some cases not allowing children to speak to their mothers at all.

One of the most significant ways that women’s support systems on the outside affect their ability to mother is through the financial support they can, or cannot, provide. An overwhelming majority (n=13) of my respondents indicated that cost is one of the challenges they face in maintaining communication with their children. The financial struggles that they experience, and the way this affects their abilities to maintain relationships with their children, support scholars’ argument that social inequalities occurring in broader U.S. society—specifically class inequality—are reproduced in prisons (Alexander 2012; Moore and Scraton 2014; Wakefield and Uggen 2010). Women make between 40 cents and \$1.25 per day working at SCCW, and each fifteen-minute phone call an inmate makes costs \$1.60, a price that, for many, is prohibitively high. For all of the women, one phone call costs more than a full day’s wage. Those making 40 cents daily must work for four days in order to pay for one 15-minute phone call. Marina told me, “I don’t have money and when you don’t have money, you can’t talk to your kids.” This can be very hard on children and sometimes difficult

for them to understand. As Danielle admitted, “It’s hard to deal with these challenges and explain to kids—I just can’t even afford a phone call!”

“It’s hurtful to be in here, while my kids are out there.”

One of the most striking themes throughout all interviews, and the most difficult to witness, was the intense emotional pain that mothering from prison has caused for the women. Emerald and Opal began to cry before I even asked my first question, and three others paused throughout as their words got trapped in their tears. All of the women expressed immense love for their children, and the pain of being separated from them was obvious and intense throughout all of their interviews. Incarceration is a deeply painful experience for most, but Natalia explained that being a parent makes that pain even more severe. She asserted that, “Going in and out of jail is so much easier without kids...you don’t have anything that’s yours, who misses you like that.” She also explained that “[It’s] really depressing and hard having kids in here,” adding that, “You’d think I’d be used to it. But, I don’t think it ever gets easier.” It’s very difficult for the women to be away from their children for so long. Linda tries to be positive, but it’s very difficult. She called the whole experience “unbearable.” Opal, who has 90 days left in her sentence, said of her son, “I just miss him, and 90 days feels like so long.” A few of the women had the especially devastating experience of being taken away from their babies upon incarceration. Danielle and Gabby were both arrested at the hospital after giving birth and Briana had the horrific experience of giving birth while incarcerated. She described this as “the worst thing that could happen to anyone... The hardest thing for any mom is walking away from her baby.”

One way that many women expressed the emotional pain of being separated from their children was to focus on the time that they could have spent with their children that has been “lost” or “wasted” in prison. Many women pointed to specific events they’re missing, like middle school graduations, birthdays, and Christmas. Briana pointed to a missed milestone in her child’s life, saying that the worst memory since being incarcerated was hearing her one

year old say “Mommy” for the first time through the phone. Others talked of missing the “little things” the most, like, as Opal said, “I just miss laying around and cuddling with him, or him saying ‘Mommy, let’s go outside and see the moon.’” Many of the women shared Natalia’s claim that “time is something you can’t get back,” Emerald has been in and out of prison throughout her children’s lives and has lost the experience of watching them grow up. She explained, “My daughter’s going to be sixteen on Wednesday and I missed everything, her whole life. And it’s not worth it—it’s just not.”

Many of the women also expressed immense guilt and regret as a result of their incarceration and absence from their children, and explained that they are failing to fulfill the role that they “should” be filling in their children’s lives. Although scholars (Alexander, 2012; Moore and Scraton 2014; Wakefield and Uggan 2010) agree that mass incarceration is a result of widespread social inequality, most of the women I interviewed indicated feeling personally responsible for their incarceration and their absence from their children’s lives. For example, Kendra said “I’m the one that screwed up. I’m grateful [my daughter] lets me be part of her life at all.” Natalia noted, “When I got here I realized how stupid I’d been,” and Briana expressed a similar sentiment with her comment that, “The experience [of giving birth in prison and having to leave the baby] was a life changer. It made me say to myself, I’ll never do what I did to put myself in this situation again.” This feeling of personal responsibility was also expressed in comments about prison and prisoners more generally. Five women implied that incarceration is caused by individual actions by people with problematic behavior. Two women made statements similar to Briana’s comment that, “People need to know that we’re not monsters, we’re just people who made mistakes.” The prevalence of this attitude throughout the interviews points to the power of the meritocracy myth in this country, as described by McNamee and Miller (2009). Respondents’ emphasis on individual behavior—rather than the important role of structures that serve to disadvantage people on the basis of gender, race, and class—suggests a failure to recognize the significance of the role

of social inequalities—inequalities that have been demonstrated to contribute to unequal rates of incarceration along lines of race and class—in their own incarceration. The fact that they are in prison must be understood in the context of an unequal criminal justice system, which victimizes poor people regardless of their “merit.” Yet, the meritocracy myth is so pervasive that they have internalized this notion of personal responsibility.

The fact that respondents describe specific roles that they “should” fill for their children, along with their expressions of personal responsibility, must also be understood in connection to powerful expectations for mothers. As Hays (1996) explains, motherhood is socially constructed as central to women’s identities, and their value is often connected to motherhood. When they cannot conform to hegemonic constructions of motherhood, as is the case for my respondents who literally cannot do so as a result of the constraints of incarceration, this can have extremely detrimental effects on the value they place on themselves, which my respondents indicated with their expressions of guilt and shame. This also points to the power of the “deviant” label that is often attached to mothers when they cannot live up to these expectations of Intensive Mothering, which is explained by Becker’s Labelling Theory.

Phone Calls, Mail, and Visits

One hundred percent of the women strongly agree that communication with their children is important to them. All but one of them have some amount of communication with their children, and seventy-six percent, or 13 of the women, communicate with their children in some way once per week or more. The three ways that women at SCCW are able to communicate with their children are through phone calls, letters, and in-person visits. Sixteen (94%) respondents use the phone, fourteen (82%) use mail, and ten (59%) have received visits at some point in their sentence.

The women described visits as the preferred method of communication, as they allow for face-to face interaction and the physical contact with their children that they desperately miss.

However, for most there are many barriers that limit visits. These include distance, as some families live many hours away, cost of transportation, limited visitation hours, and caregivers' lack of time to transport children. Francesca sees her children more than anyone else—they visit every other month—but for the majority of the women it's far less frequent. For most of them, phone calls are used most often and serve as the way to remain involved and up to date on children's daily lives. Women said that their kids tell them about school, friends, family issues, and other everyday things. For most of them, the phone is the most important way for them to remain knowledgeable about their children's lives and keep up to date on what happens to them day to day. Phone calls are extremely important to women, especially for those who do not receive visits, for whom phone calls are the only time they hear their children's voices. When talking about phone calls, Opal explained, "If it weren't for that, I don't know what I'd do." However, there are plenty of issues with phone calls as well, including family members not answering the phone, small children getting confused, and most importantly, the high cost of calls. While the majority use mail as well, many of them explained that it is often a one-sided type of communication, and they would much prefer to hear their children's voices.

"It's hard being a mother behind bars, but it's not impossible."

While these harsh constraints severely limit women's capacity to mother, all of the women who have communication with their children still exhibit their agency in the ways that they manage to mother within the constraints of the prison. Many women agreed with Linda's assertion that "it's hard being a mother behind bars, but it's not impossible." These women have far from given up on their children; rather, they work hard to give their children support and let them know they care, even within an institution that makes this incredibly difficult. As Linda says, "I still employ my motherly duties over the phone." Many of them still provide emotional support for their children, talking on the phone when they have issues, encouraging them, and letting them know they are proud of them.

One of the most common methods that the women employ to remain connected to their children and show their children that they care is by sending love in the mail. They send cards, pictures, art projects, crocheted hats and blankets, and they put a ton of work into all of it. As Kendra told me, “Money and things aren’t everything, but when it’s all you have, it helps to say, ‘Hey, I’m here, I care.’” Through material items, mothers can maintain a level of connection and care, even if the items they send are small. Pearl explained that she adds little things to her letters to her son, like foam hearts that she gets in her drug class, “So he has something I’ve touched and he’s touched.”

Despite the emotional pain these women experience from being separated from their children and missing out on their lives, as well as the enormous constraints that incarceration puts on their ability to parent, all of them still indicated that they are extremely devoted to their children. It seems that their worlds largely revolve around their children, even though they aren’t home to care for them or interact with them regularly. Linda summed it up quite nicely, saying, “My motherhood didn’t expire because I’m here.” When talking about her son, Gabby told me, “I grew him, I birthed him, he’s mine.” Francesca said of her children, “They are my reason for living.” She also explained that she has a journal for each one of her three children. She writes in each of them every single day, and she plans to give the journals to her children at some point in the future. Pearl, who is extremely close to her son, goes to the library and finds books about subjects that her son likes and she reads up on them, taking notes, so that she can call and talk to him about subjects that interest him later. She wants him to know, “Mom is in here, but you’re still number one.”

“Don’t forget about the children.”

The constraints of prison, which can be unbearable for mothers, have extremely significant effects on their children. For many participants, knowing that their incarceration is so difficult for their children is one of the hardest parts of being in prison. Aly illustrated this very clearly when she told me, “When a mom is in jail, the kids are in jail too. Don’t forget about the kids.” She

also said, as if to her children, “Y’all know the struggle like I do. It’s equally the same, but the only difference is I’m behind a fence and you’re not.” Other women expressed a similar sentiment, explaining that the pain of incarceration goes far beyond them. Danielle explained that “prison changes families.” The emotional pain of being separated from their moms can be unbearable for the kids. Haley told me, “It’s a knife to their heart, me coming in here” and Briana explained, “It’s devastating for my little one.” When Haley told her children she would be coming to prison, her son could not eat or talk because the news was so painful to him. When talking about first leaving home for prison, Pearl told me, “It’s like a death—it really is.” The experience was so traumatic for Pearl’s son that he could not speak to her for a month. For that first month, she only wrote letters to him because it was less painful for him to read her words than to hear her voice.

Women described a wide variety of ways their incarceration has affected their children. Two women talked about their children’s bad behavior and involvement with the criminal justice system. Gabby said that the first time she went to prison her son’s eating habits and health changed. Kendra’s daughter gets severe anxiety if she doesn’t know where her grandma, who takes care of her, is or if her mom doesn’t call when she says she will. Kendra thinks her daughter’s anxiety is a result of her incarceration. As she said, this is what can happen when you “rip someone away from everything they know.”

Seven women indicated that their children are angry at them for being in prison, or for the behaviors that led to their incarceration. Natalia said that during past sentences, her daughter always wanted to talk to her, but not this time. She explained, “She thinks I’m picking being gone over her.” When talking about her son, Linda said, “He has a big sense of resentment towards me.” Along with lack of communication, Danielle attributes the closer bond she has with her daughter compared to her sons, to the fact that she was “in their lives more in the free world than with her [Danielle’s daughter]—so when I had to leave them there was more resentment and pain than with her, who has never had but a few months of freedom with me.”

For most of the children, especially those who were in their mother's custody before incarceration, their mother's incarceration has significantly changed their everyday lives. For some, it has led to very difficult living situations. Marina's children have been separated from one another, and their caregivers do not speak to each other at all. "It's hard on everybody," Marina said. Danielle's daughter has been "here and there" her entire life, always sleeping on someone's couch. While Linda is grateful that her children are fed, dressed, and taken to the doctor when necessary, she is disappointed with the care they are receiving from her sister, who took them in upon her incarceration. As she explained to me, "Nobody's gonna raise your child like you."

Having their mothers in prison is also extremely emotionally challenging for children because they miss their moms deeply. Mothers also expressed the closeness they share with their children and how important they are to their children by describing how much their kids miss them and how excited they are for them to come home. Danielle, Francesca, and Opal told me that their children are "counting down the days" until they will get to see their mothers. Opal's son literally dreams about her coming home. He's so desperate to see his mom, he recently told her, "I'm going to wait until the guards go to sleep and dig a hole under the fence." It's extremely painful for children to see their mothers in prison. As Haley stated, "They hate to see me in here" and Aly told me "They want me to not be away anymore," and that they just want to be a family again. When Linda talks to her five year-old on the phone, "It sounds like he's dying." He asks, "Mom, how many more days?"

"I'm the one that screwed up."

Although scholars (Alexander 2012; Moore and Scraton 2014; Wakefield and Uggen 2010) agree that mass incarceration is a result of widespread social inequality, most of the women I interviewed indicated feeling personally responsible for their incarceration and their absence from their children's lives. This feeling was expressed explicitly at times, and more indirectly at others. Sometimes, women directly blamed themselves for their incarceration or absence. For example, Kendra said "I'm the one

that screwed up. I'm grateful [my daughter] lets me be part of her life at all." Natalia noted "When I got here I realized how stupid I'd been," and later questioned, "What am I missing? I'm such an idiot!" Briana expressed a similar sentiment with her comment that "the experience [of giving birth in prison and having to leave the baby] was a life changer. It made me say to myself, I'll never do what I did to put myself in this situation again." Opal showed that she very clearly sees her absence from her children as her fault when she told me, "It's my choice. I chose to go back to drugs."

These instances represent the sentiment expressed by women throughout the interviews that they bear the burden of responsibility for incarceration and that their incarceration is a result of their behavior. The prevalence of this attitude throughout the interviews points to the power of the meritocracy myth in this country, as described by McNamee and Miller (2009). McNamee and Miller, assert that this myth, that a person's success or failure is primarily a result of how hard she works, is "deeply ingrained in the American consciousness" (2009:2). My respondents expressions of personal responsibility for their failures—to stay out of prison, to stay off of drugs, to remain in close physical contact with their children, to mother well—indicate their internalization of ideas of personal responsibility and meritocracy, especially as these apply to mothering. Moreover, their emphasis on individual behavior—rather than the important role of structures that serve to disadvantage people on the basis of gender, race, and class—suggests a failure to recognize the significance of the role of social inequalities—inequalities that have been demonstrated to contribute to unequal rates of incarceration along lines of race and class—in their own incarceration.

"I'm gonna turn my life around, for myself and for them."

While women indicated feeling guilty or otherwise negatively about their roles as mothers and how their relationships with their children and their children's lives have been affected, in many ways women also painted their roles as mothers and their relationships with their children in a positive light. One example of motherhood functioning in a positive way occurs when their

children serve as motivation for the women. For some, their children are motivation to change the behaviors that contributed to incarceration. For example, Natalia told me, “I’m gonna turn my life around, for myself and for them.” For some women, this specifically translates to their involvement in educational and rehabilitation programs. For example, Gabby told me, “I’m going to send my son my 90-day NA chip. He’s my inspiration.” As Camille explained, she does what she does in prison because of her children, and she keeps them involved in her accomplishments. She told me, “If I achieve something in here I call them so they can be part of it.” She explained that when she calls them about the progress she’s made in acquiring her GED they tell her ““Yay mamma, we’re so proud of you!”” For her, making them proud like this keeps her going. Kendra explained that she sees a big difference between the behavior of women who can talk to their children often and those who cannot. For those who have frequent contact, “It’s like they have something to lose if they get in trouble,” she said. For some, their relationships with their children, and keeping in contact with them is simply motivation to make it through the struggle of incarceration. As Haley commented, “Keeping in touch with them keeps me sane. It’s what’s going to get me through the next four years.”

Five women also indicated that they are using the experience of incarceration to help their children by encouraging them to learn from their mother’s mistakes. Some of these women explicitly tell their children to avoid behavior that may result in them becoming involved in the criminal justice system. Marina tells her daughter, “You keep disobeying authority and you’re gonna end up where I am.” Camille, who persuaded her children out of “the drug life,” tells them, “This isn’t the life you want to live. Don’t take your freedom for granted because you don’t miss it till it’s gone.” She explained that she doesn’t want them to have to go through what she’s going through now. Haley sends a similar message to her children by telling them all about prison in hopes that, “It deters them from coming here.” Similarly, Briana told me, “I am brutally honest with them, so hopefully they’ll learn from my mistakes.” These moms’ negative experiences in prison make it difficult for

them to mother their children in the way they would like, yet they have still found ways to use the experiences to teach their children and influence them in positive ways. This functions as an example of Giddens' Structuration Theory, as the women are still able to, in certain ways, use their agency to push back against hegemonic constructions of motherhood and construct positive identities as mothers.

Not only did women express teaching their children to learn from their mistakes, many also indicated that the experience of prison has taught them to change their own behavior. Aly told me, "I'm not the same person I was eighteen years ago," and Francesca said the same thing about her four years in prison. Haley assured me that her children know she has changed. Many women indicated that they have gotten clean, gotten their lives together, or something along those lines. For Camille, her experience in prison has even positively impacted her role as a mother. She told me, "I've gotten my life together in here. I've had time to work on things. I learned to be a better mom from here."

My respondents were extremely honest about the struggles they have had and the ways that they feel insufficient as mothers. At the same time, they shared that they are proud of the immense effort they put into caring for their children despite the incredible challenges of incarceration. While acknowledging that, in many ways, they cannot mother in the way they would like to, they still pointed to the things that they do that make them good mothers, in part by discussing their past mothering experiences, expressing their devotion to their children, describing everything they continue to do for their children from prison, and pointing to the personal changes they have made, or are working to make. Their identities as mothers are clearly incredibly important to them. For these women, who consistently described how hard they work to mother their children inside an institution that inserts physical and psychological barriers between them and their children, their efforts are focused primarily on caring for their children the best that they can. No matter how hard they work, incarceration—which physically separates them from their children, limits and charges high costs for phone calls, limits and constrains visitations,

and results in child custody situations that make communication difficult—makes it literally impossible for these mothers to live up to the expectations of hegemonic constructions of motherhood. However, within the constraints, they are authentically attempting to be the best mothers they can be for their children.

The guilt, regret, and personal responsibility that the women express all point to the power of dominant constructions of motherhood as explicated by Hays’ concept of Intensive Mothering, which tells even mothers in prison that their motherhood should look a certain way. It also highlights the power of the “deviant” label that mothers are often given when they don’t live up to these expectations, as explained by Becker’s Labelling Theory. The women’s responses in interviews indicate that they have deeply internalized these social ideals and the deviant label. However, while the women acknowledge that in many ways they cannot live up to these expectations, they still have agency in constructing their identities and pointed to the things that, in their opinions, do make them good mothers. Their failure to conform to dominant constructions of motherhood certainly affects the women, but, as Giddens’ Structuration Theory asserts, all people have agency, and these women use theirs to push back against these social ideals and construct themselves, in certain ways, as good mothers.

At the end of the interviews, many women expressed gratitude towards me for engaging in this research, and for sharing their experiences with others. Many of them described feeling that people on the outside do not care about them, and explained that their voices are rarely heard and often silenced. They know that people hold onto negative perceptions of those in prison, and they want their real stories and voices to be heard. This, they thought, may help humanize them and prove that they are not bad people. Many of them stressed that this project felt very important to them.

HARMING MOTHERS, HARMING CHILDREN: SIGNIFICANCE OF RESEARCH AND RECOMMENDATIONS FOR CHANGES TO PRISON POLICY

Mass incarceration affects millions of families in the U.S. For many it is a deeply painful experience with lasting

intergenerational effects. Yet, with prisons hidden from view and incarcerated people's voices marginalized, it is far too easy to remain ignorant to, or even to consciously ignore, the large incarcerated population of the U.S. Their stories and struggles are largely absent from the consciousness of the general public. It is far easier to maintain an oppressive system when those that it harms are painted as monsters, or simply put out of mind. This research illuminates the pain and struggle of some of those millions of people dealing with mass incarceration. It highlights the ways that prison severely limits mothers' ability to parent, and therefore hurts children and families. It helps bring these stories to the public and humanizes the people affected by this system. When they are seen as humans, with families that they love, and children who are suffering, their struggles become more difficult to ignore, and the entire system can more easily be questioned and faces a greater threat.

This research also illuminates the negative consequences of the strict expectations we have for mothers by specifically looking at the pain and guilt mothers in prison can feel as a result of their inability to live up to these. This shows the harm caused by these expectations for mothers by showing that the pain of incarceration is even further amplified by their inability to mother as they would like to and feel that they should. This research also points to the connection between income and incarceration and shows that income inequality continues to affect mothers upon incarceration by limiting their ability to communicate with their children. It points to the lack of support for low-income people in prisons, which is a massive problem for incarcerated people in general. It also highlights the pervasiveness of the illusion that people are fully responsible for their involvement in the criminal justice system and the erasure of the social inequalities that affect incarceration rates.

According to my findings, incarcerating mothers is incredibly harmful for mothers, their children, the relationships between them, and other people in their lives. Drawing on my respondents' experiences, mothers do not belong in prisons. Prison takes mothers away from their children and it is not healthy for women or their families. That being said, so long as mothers

continue to be incarcerated, there are many things that could change within prisons that would positively impact mothers' ability to maintain connections with their children and perform their mothering roles. While mothering from prison is quite difficult for my respondents, the communication they do have brings them enormous joy. Past research also shows that increased contact is associated with higher levels of self-esteem and lower levels of parenting stress and depression (Thompson and Harm 2000; Tuerk and Loper 2006). The following recommendations, intended to increase mother-child contact, are specifically for SCCW as that is where I collected data; however, they certainly apply more broadly.

First, perhaps most importantly, all inmates should be provided free phone calls and stamps. As cost is one of the major barriers to communication, providing this for free would significantly increase the amount of communication between mothers and children, and relieve mothers and their family members of the financial burden. I recommend changes to visitation procedures as well. These include more frequent and longer visitation hours. This would allow children and their caregivers more flexibility in terms of timing of visits. It would also potentially give families more time together and the long distances many must travel may be more worthwhile. Also, visitation times should not be limited to early morning as they currently are for half of the inmates. Additionally, introducing more opportunities for children to stay with their mothers, similar to the mother-child retreat, would give them more chances to spend significant amounts of time together and to bond in a way that many explained that letters and phone calls do not allow them to do. These programs should also be open to children of all ages so that all children have access to their mothers. As a lack of funds is one of the main reasons that children are not able to visit their mothers, funds should be provided to families so that they can afford to travel to the prison, and potentially stay overnight there if necessary. While there are other reasons that children cannot visit, having the funds provided would erase one of the main barriers for many families. While the following recommendations would increase cost, based on the research that shows that increased

contact with children is associated with reduced rates of recidivism, these changes have the potential to decrease the number of women going back to prison, and therefore cut costs significantly (Hairston 2002; Klein et al. 2002). Moreover, a price cannot be attached to mothers' well-being and their relationships with their children. Regardless of the costs associated with these recommended changes, mothers in prison need support and deserve to have access to their children.

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contours in the air (for ruth) #1
by Jesse Raven

Public Spheres in a Digital Age: Consensus, Confrontation, and Humility

Abstract:

Since Habermas' writing of *The Structural Transformation of the Public Sphere*, there have been many reformulations of what exactly we mean when we talk about the public sphere, that place in which members of the public(s) discuss issues, confront one another and form public opinion. Feminist thinkers such as Nancy Fraser criticize Habermas' focus on consensus, arguing that it favors a dominant identity-based viewpoint that reinforces exclusions and seeks erasure or assimilation rather than consensus. Others, such as Benjamin Ardit, criticize Fraser for still implicitly advocating for consensus or reconciliation by treating equality and inclusion as a substantive goal, instead of something that is constantly sought after through continuous testing and confrontation. I adopt aspects of these critiques to re-articulate the basic aims of the public sphere: inclusion and structural equality must be accompanied by "epistemic discovery" and political empathy as new aims. Adopting these new fundamental pillars of the public sphere, I confront present day spheres, namely digital ones, and argue that public opinion formed within them does not meet the standard of normative legitimacy because it does not discredit views that do not stand up to critical inquiry. The structures of digital public spheres even discourage this inquiry from happening, tending instead to isolate viewpoints in self-reflecting separation.

I will be approaching this issue both normatively and empirically, again using Fraser's model of walking the fine line between an overly empirical approach that simply describes the present reality and one in which the normative argument focuses too heavily on ideals and ignores that same reality. On the one hand, we must understand the existing structures of our public spheres, and on the other hand, we must think about how these structures may be improved to achieve their task of creating legitimate public opinion.

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INTRODUCTION

The political happenings in recent years have prompted discussions about the health of public discourse and opinion, as well as the processes through which both are formed. Although a theory of the public sphere has long been a debate within academia, popular discourse has now come to ask whether citizens are able to engage in meaningful interaction in public spaces. At the center of many attempts to answer this question is reckoning with digital platforms such as social media and their effect on the public sphere. With ever-increasing urgency, the structures of digital public spheres need to be understood and confronted. As countries begin to question the role of these digital spaces in their politics, and as more incidents of manipulation of public opinion through them come to light, it is clear that digital public spheres play a major role in the formation of public opinion and hence in a country's political processes.

In my argument, I will be addressing these two interrelated questions: what the public sphere is and what—if any—role consensus should play in it. I will be arguing that, through a theory of the public sphere that centers epistemic confrontation, humility, and discovery, it is possible to shift away from a focus on consensus and toward a diversity of epistemic standpoints that form a notion of a publicity of plurality. This notion of the public sphere can guide us as we come to terms with the role of digital public spheres in our democracy and seek to reform them to better serve social good by creating meaningful public spaces online.

Before confronting these structures, we must articulate what we mean when we talk of the public sphere, a concept that has long been discussed in political philosophy. One of the conceptions of the public sphere that is central to my paper, and which I will build from, is that of Nancy Fraser, who defines the public sphere as “a space for the communicative generation of public opinion. Insofar as the process is inclusive and fair, publicity is supposed to discredit views that cannot withstand critical scrutiny and to assure

the legitimacy of those that do.”¹ While this will be the starting point of my own conception of the public sphere, the question of consensus is where I will focus my critique of Fraser. This is similar to Fraser’s own critique of German political philosopher Jürgen Habermas’ theory of the public sphere. She critiques the ideal of neutrality and consensus in Habermas’ bourgeois public sphere, as he argues that individuals must set aside their own particular social position to discuss matters concerning the whole. Fraser sees this as a demand to conform to prevailing norms and standards, effectively excluding marginalized groups from the public sphere, even if they are granted formal inclusion. However, she still points out that “something like Habermas’ idea of the public sphere is indispensable to critical social theory and to democratic political practice.” Similarly, I will use Fraser as a jumping off point while still critiquing aspects of her theory and arguing that consensus still plays a central role in her public sphere.

My position adopts a constructivist approach to public sphere theory. This is one in which value is placed on popular inclusion, which is grounded in a recognition of distinct epistemic standpoints of various individuals and groups.² I will first outline Nancy Fraser’s critique of Habermas’ public sphere and offer a further critique of Fraser’s implicit goal of ideal consensus. I will then expand on the notion of inclusion through ethical recognition by introducing Luce Irigaray’s concept of recognition applied to political contexts. Through this model, I will argue that digital public spheres, constructed as they are on algorithmic personalization, do not maintain the goals of this conception of the public sphere. I will offer some speculative ideas on how these spaces might be changed to aim toward the goals of epistemic confrontation and discovery laid out in this paper.

¹Nancy Fraser, “Transnationalizing the Public Sphere: On the Legitimacy and Efficacy of Public Opinion in a Post-Westphalian World,” *Theory, Culture, and Society* 24, no. 7 (2007): 7.

² Myra Marx Ferree, William A. Gamson, Jürgen Gerhards, and Dieter Rucht, “Four Models of the Public Sphere in Modern Democracies,” *Theory and Society* 31, (2002): 307.

NANCY FRASER'S PUBLIC SPHERE

Fraser argues that the public sphere should ensure the “*normative legitimacy* and *political efficacy* of public opinion,”³ a purpose which informs her critique of Habermas’ public sphere and her own reformulation of it. She highlights the exclusivity upon which the public sphere has historically rested, criticizing Habermas’s idealization of “the liberal public sphere” as well as his failure to include other public spheres in his account.⁴ She argues that “[w]e can no longer assume that the bourgeois conception of the public sphere was simply an unrealized utopian ideal; it was also a masculinist ideological notion that functioned to legitimate an emergent form of class rule.”⁵ A public sphere, which was claimed to be a neutral space, was in fact grounded in the private interests of a small number of class and identity groups.

This claim to neutrality is grounded in Habermas’ idea of bracketing social position to participate in the public sphere, in which individuals set aside their particular position to address issues concerning the whole. As Fraser correctly points out, this simply isn’t possible, and requiring bracketing for participation functions as informal exclusion. She points to the fact that “discursive interaction within the bourgeois public sphere was governed by protocols of style and decorum that were themselves correlates and markers of status inequality.” This meant that, even if formal access to the public sphere were granted, these basic models of discourse provided informal methods of excluding “women and members of the plebeian classes.”⁶ The public sphere, then, has historically excluded groups other than upper-class, white men both formally and informally.

Fraser’s remedy for the critique of exclusivity is the introduction of a multiplicity of publics that contest varying particular interests. Firstly, this aims to overcome the informal

³ Ibid., 7.

⁴ Nancy Fraser, “Rethinking the Public Sphere: A Contribution to the Critique of Actually Existing Democracy,” *Social Text*, no. 25/26 (1990): 60-61.

⁵ Ibid., 62.

⁶ Ibid., 63.

exclusion by allowing members of these “subaltern counterpublics”⁷ to form their own modes of interaction; secondly, it further aims to overcome the formal exclusion through contesting what counts as “common interests” to be discussed in the public sphere. She analyzes historical ways in which women have found alternative access routes to public discussion, including street protests, women-only associations, and parades.⁸ These alternative access routes helped contest the interests presented in dominant public spheres through the confrontation by other standpoints discussed and developed in counterpublics. Today, many similar tactics are used by movements such as Occupy Wall Street, Black Lives Matter, and #metoo. Members of these groups may be said to be part of counterpublics that are simultaneously creating new conversations and basic methods of discussion around the issues of gender, race, and class and contesting how these topics are discussed in the public at large. For example, one way of framing a critique of the “all lives matter” response to BLM is to point out that the former is just the sort of false consensus/neutrality that Fraser criticizes. One of the important aspects of BLM is to refuse to bracket blackness and to confront the standard of whiteness masquerading as neutrality and “all.”

Through the activities of these counterpublics, Fraser aims to remedy the structural inequality that functions as formal exclusion from the public sphere. In a stratified society, she argues that this mainly takes the model of contesting dominant and accepted methods of communication and topics of discussion; in an egalitarian society, however, these counterpublics are still necessary to represent differing interests. Fraser stresses that a “multi-cultural literacy” would be required, stating her belief that such a literacy would be possible with much practice.⁹ However, the strategy of contestation present in stratified societies is no longer as important. In a paper responding to Fraser’s conception of the public sphere, Benjamin Arditì provides a useful explanation of this, explaining

⁷ *Ibid.*, 67.

⁸ *Ibid.*, 61.

⁹ *Ibid.*, 69-70.

that counterpublics “are part of a strategic logic aimed to redress the inequality of stratified society, and hence are passageways between an unacceptable present and a desired state of affairs where there would be no structural relations of domination and subordination.”¹⁰ This leaves us with the question of whether Fraser believes that true consensus, as opposed to consensus as erasure and dominance, could be achieved if conditions were correct.

Despite her reformulated conception of the public sphere that fights against illegitimate consensus in a stratified society, Fraser still seems to believe that consensus could still be held as a goal for the public sphere, given conditions of structural equality in an egalitarian society. She is wary of “consensus that purports to represent the common good” in a structurally unequal social context, which “should be regarded with suspicion, since this consensus will have been reached through deliberative processes tainted by the effects of dominance and subordination.”¹¹ However, in this suspicion Fraser implies that if the deliberation process were *not* tainted, consensus may well be achieved. This conclusion can be seen in her exploration of inter-public discussion in an egalitarian society described above. The focus shifts from contestation to communication across difference without a need for confrontation. Although communication across difference is important if the public sphere is to be truly inclusive, I will argue that the experience of being confronted by identities and epistemic perspectives not your own must continually assure that difference is recognized.

Fraser implicitly aims for some sort of consensus in this way, a consensus through structural harmony and equality achieved by the hypothetical, egalitarian society that she lays out. Benjamin Arditì raises concerns about this foundational aspect of Fraser’s public sphere, pointing out that “this model of the good society maintains an uncanny closeness to the Hegelian and Marxist thesis of the end of history where fundamental oppositions have come

¹⁰ Benjamin Arditì, “Disagreement Without Reconciliation: Democracy, Equality, and the Public Realm,” *Critical Review of International Social and Political Philosophy* 12, no. 2 (2009): 170.

¹¹ *Ibid.*, 73.

to an end, either through the advent of reason or of a classless society.”¹² She adopts what Arditì calls an “ethos of reconciliation,”¹³ looking ahead to some sort of telos at which these goals of inclusion, structural equality, and participatory parity are achieved as a finality. At this point, a genuine consensus would become possible.

Of course, Fraser provides important aspects of a theory of the public sphere. She claims that individuals cannot bracket their social position in order to discuss an alleged common good, and so interests formerly deemed “private” should be included in the public sphere; the proliferation of many public spheres contributes to criticizing false consensus in the form of a dominant perspective subsuming other, marginalized perspectives. All of these points are vitally important to any critical discussion of the public sphere. However, there is still an underlying idea in her work that consensus is somehow possible: that, in the end, the goal of the public sphere is to facilitate reconciliation and consensus once structural equality is achieved.

It is this fundamental goal of consensus that I will argue against, aiming toward a new facilitation of confrontation and productive non-consensus in order to encourage “epistemic humility” and political empathy. I will use contributions from Arditì, who is explicitly responding to Fraser, before drawing from feminist thinkers to create a model of the public sphere aimed at epistemic discovery and political empathy.

FROM CONSENSUS TO CONTESTATION

Arditì argues that we should think of equality as a *pursuit* within democratic society—one of many in the public sphere—instead of a *precondition* to democratic society. Where there is the initial equality of inclusion in public space, groups constantly seek further means of obtaining and ensuring equality. He explains that these “political supplements” are necessary to continually pursue and assure the initial equality: “People go public to acquire greater

¹² Arditì, “Disagreement Without Reconciliation,” 172.

¹³ *Ibid.*

visibility, weight and attention, whether through protests and demonstration or through more institutional modes of intervention like party coalitions, organized interest groups and social movements.”¹⁴ This method of “going public” is necessary because inequality is not a static situation to be overcome and moved past; instead, it is likely that it will resurface in various configurations and through various structures and methods. That is why public space must be “a site of confrontations that is also modified by those confrontations.”¹⁵ These confrontations constantly aim at verifying and striving toward equality. Disagreement and polemic, Arditì argues, are tools with which to verify equality, and thus are constitutive of the public sphere.^{16,17} With this model, in which an egalitarian society as Fraser describes it is abandoned as a telos, consensus no longer holds a place in the public sphere; instead, it is always something to be skeptical of as a potential marker of inequality, erasure, and exclusion.

I would like to introduce another purpose of disagreement and confrontation into this model, one that focuses more on how it challenges those whose privileged identity is confronted. While Arditì provides a valuable model of disagreement that focuses on the group that initiates confrontation, a focus on the reception of confrontation would evaluate the ways in which we perceive an opposing epistemic standpoint that confronts us and how that confrontation changes us. If confrontation does not aim toward consensus, it still must aim toward something else; recognition through epistemic humility and discovery can replace consensus as the aim of confrontation. This model draws heavily from fundamental ideas explored by feminist and critical race theorists.

¹⁴ *Ibid.*, 174.

¹⁵ *Ibid.*, 175.

¹⁶ *Ibid.*

¹⁷ Fraser articulates some model of this confrontation as well, in her discussion of methods historically used by marginalized groups to gain access to public spheres; however, the difference here is that Arditì models these confrontations as constitutive, whereas Fraser models them as a step toward inclusion and a truly effective model of the public sphere. In ideal conditions, Fraser’s public sphere would not require these confrontations.

I will explicitly draw from Luce Irigaray and Lorraine Code in formulating a model of *epistemic humility* that aims to promote *epistemic discovery* and political empathy, both of which contribute to a public sphere constituted by disagreement and confrontation.

A model of epistemic humility is grounded in Irigaray's rewriting of Hegel's concepts of recognition and the "negative" space in relations with others, as well as Code's rejection of prevailing epistemological models. Irigaray, in her book *I Love To You*, calls for men and women to develop methods of communication through which true intersubjectivity can be created, which requires women to have the ability to express themselves as true subjects without being subsumed in a dominant, patriarchal mode of expression. In order to accomplish this task, each gender must recognize the Other, not in the framework of Hegel's master-slave dialectic, but rather as that which they cannot be, seeing the limits of their own embodied perspective and gender as a pathway to recognizing the Other as that which they cannot be. Ethical recognition involves attempting to engage in truly dialogical communication, where neither individual is subsumed by the other's perspective or mode of expression, as happens in Hegel's model in which the negative "other" is subsumed. While Irigaray's project is based around an intersubjectivity in gender relationships, this model can be applied to political relationships and the public sphere, seeking to facilitate recognition of other epistemic standpoints through epistemic humility. Instead of focusing primarily on recognizing the other's gendered perspective, her method can be applied politically to other epistemic standpoints. Political empathy requires more than simply hearing other opinions through their words and arguments, but rather requires serious effort by the individual to adopt a stance of epistemic humility in order to truly discover and begin to understand another epistemic standpoint. It is from this challenging point that political empathy can grow. While the development of this humility and empathy is not a singular solution to political polarization, it seeks to develop a politics of difference that answers the criticism of divisiveness and tribalism.

Importantly, while consensus may occur at times, it is not

the goal of this model. Rather, it adopts Arditì's model: any alleged consensus is tested by confrontation of other epistemological standpoints and inequality is assumed to be prone to resurfacing. The addition of epistemic humility seeks to increase the efficacy of these confrontations as a check against consensus as erasure or exclusion of epistemic standpoints. Fraser's model of subaltern counterpublics is compatible with Irigaray's project as well. Fraser views this counterpublics as a space in which groups can first "formulate oppositional interpretations of their identities, interests, and needs"¹⁸ before they interact with other publics and, as Arditì phrases it, go public. Similarly, for Irigaray, because the dominant models of perspective and expression are centered around masculine norms, a positive female identity must first be developed before recognition and intersubjective communication can occur.

In her rewriting of Hegelian recognition, Irigaray defines recognition partly through the lack of mastery over another. She writes that "[r]ecognizing you means or implies respecting you as other, accepting that I draw myself to a halt before you as before something insurmountable, a mystery... I recognize you signifies that you are different from me, that I cannot identify myself (with) nor master your becoming. I will never be your master."¹⁹ Furthermore, recognition requires an epistemic humility, a self-recognition of that your being, perspective, and knowledge does not encompass a whole. By recognizing the other and affirming that they exist and are another individual separate from yourself, Irigaray argues that "I mark you, I mark myself with incompleteness, with the negative."²⁰ The viewing of one's own limitation in order to recognize the other is the necessary first step of epistemic humility. In this model of recognition, the master-slave relationship is avoided by creating "a different sort of recognition from the one marked by hierarchy, and thus also by genealogy."²¹ The negative is no longer something to be subsumed, but rather a gulf of difference that is crossed equally by both individuals

¹⁸ Fraser, "Rethinking the Public Sphere," 67.

¹⁹ Luce Irigaray, *I Love To You* (New York: Routledge, 1996), 104.

²⁰ *Ibid.*, 105.

²¹ *Ibid.*

through recognition, both being changed by the process while both remaining themselves. Inclusion into the public sphere no longer means the subsuming of included groups into dominant discursive practices.

This epistemological dominance that Irigaray describes is similar to that laid out in Lorraine Code's piece, "Taking Subjectivity Into Account,"²² in which she argues against the claim that " S knows that p ," which is the claim that knowers are interchangeable given the same empirical circumstances (S being any knower with certain empirical input, and p being the thing that is known). Code argues that this claim of interchangeability assumes "a universal, homogenous, and essential 'human nature'" that is not justified.²³ Similarly, Irigaray argues that one gender, or group of knowers with a similar epistemological standpoint, cannot see itself as the entirety of human nature and must give up this sort of epistemological dominance, stating that man must give up the "domination of nature and of the economy of subjectivity."²⁴ As I will argue later, this shift has political implications as well, relating to the ideal of consensus.

One necessary step in Irigaray's model of true communication between genders, then, is the adoption of epistemic humility. How may one gender give up their monopoly on true knowledge without the adoption of this humility? In order to love another, or even to begin intersubjective dialogue, recognizing one's own limits of being and knowing—epistemic humility—is a vital first step. Through epistemic humility, one may then open the door to epistemic discovery. In communication within Irigaray's framework, each knower (in this case a man and a woman), may begin to know the other.

As Code points out, the idea of knowing another person in this deeper sense may not sit well in many academic circles. She points out that "[t]he contention that people are *knowable* may sit uneasily with psychoanalytic decenterings of conscious

²² Lorraine Code, "Taking Subjectivity Into Account," chap. 2 in *Feminist Epistemologies*, ed. Linda Alcoff (New York: Routledge, 1993).

²³ *Ibid.*, 16.

²⁴ Irigaray, *I Love To You*, 46.

subjectivity and postmodern critiques of the unified subject of Enlightenment humanism. But I think this is a tension that has to be acknowledged and maintained.”²⁵ Further, she points out that, while this knowledge of others often seems shaky and unable to stand up to serious critique, it is more similar to knowledge about other things as well. Many fields of study rely on knowing people for their credibility, she argues, and so “it is all the more curious that observation-based knowledge of material objects and the methodology of the physical sciences hold such relatively unchallenged sway as the paradigm—and paragon—of intellectual achievement.”²⁶ Of course, knowing another person is not a simple matter of collecting data and facts about them, nor is it ascertaining a fixed knowledge of them. Code points out that “precisely because of the fluctuations and contradictions of subjectivity, this process is ongoing, communicative, and interpretive. It is never fixed or complete.”²⁷ If we begin, as Code’s title suggests, to take subjectivity into account, the ability to know another, at least in a way that is constantly adjusted and tested, seems more likely.²⁸

If it is assumed that knowing someone in this sense is a possibility, epistemic humility and discovery appear to be a viable goal to strive toward. As Code points out, one aspect of her epistemological project is to assert “the political investedness of most knowledge-producing activity and insists upon the accountability—the epistemic responsibilities—of knowing subjects to the community, not just to the evidence.”²⁹ It is best, then, to view this new stance of humility that Irigaray proposes as a knowledge-

²⁵ Code, *Taking Subjectivity Into Account*, 34.

²⁶ *Ibid.*, 35.

²⁷ *Ibid.*, 34.

²⁸ Code’s description of knowledge is similar in this passage to W.V. Quine’s description of knowledge as “a man-made fabric which impinges on experience only along the edges...[a] conflict with experience at the periphery occasions readjustments in the interior of the field,” which creates a series of re-evaluations of various truths or ideas. This is a conception of knowledge and truth that moves away from a system of verification and the obtainment of static facts based strictly in the physical sciences. W.V. Quine, “Two Dogmas of Empiricism,” *The Philosophical Review* 60, no. 1 (Jan. 1951): 39.

²⁹ Code, *Taking Subjectivity Into Account*, 20.

producing activity that opens up new ways of communicating and relating to one another. It is politically invested in creating new ways of communicating across issues and between identities of all sorts. It is a discursive model of political empathy. When Irigaray states that we need to create an era in our culture “in which the subject is no longer *one*, solipsistic, egocentric and potentially imperialistic, but which rather respects differences,”³⁰ her point can be read in two ways simultaneously. On the one hand, the male subject is no longer one in a broader sense of not being the neutral from which the female is defined as “not male.” On the other hand, this can be read in an individual sense: the individual takes a stance of non-projection through adopting epistemic humility. This opens up a new sense of public engagement, in which the speaker is no longer the sole knower. Simultaneously, the speaker who is being listened to is re-centered as another knower, a *different* knower. This pushes back against the “S knows that *p*” interchangeability of knowers that Code criticizes.

In a political context, knowing another requires more than watching the occasional talk show that runs counter to your own political beliefs, but rather learning to hear those beliefs in the voice of the other. The responsibility of individual knowers, then, becomes recognizing themselves as a singular knower and striving toward epistemic humility in order to recognize (in the sense Irigaray speaks of) other knowers as that which they cannot be, acknowledging the reciprocal transcendence between two knowers.

Importantly, however, knowing another through this epistemic discovery is not becoming another. Irigaray criticizes movements in which the goal is to “wipe out [sexual] difference by resorting to monosexuality, to the unisex.”³¹ This would be a different version of neutralizing knowledge that is grounded in a particular standpoint, re-centering the knower’s knowledge as complete and objective. Knowing another is never to become them, but to respect what you cannot be, a knower from their particular

³⁰ Irigaray, *I Love To You*, 47.

³¹ *Ibid.*, 61. Importantly, Irigaray uses this to problematically dismiss transgender identities, but there is a point beside this as well.

standpoint. Arrogantly assuming to know another enough to become them would be to abandon a stance of epistemic humility, one that must be maintained throughout discovery to foster political empathy. This sense of knowing another in a supposedly objective way aims toward an allegedly neutral “common good” that, in reality, subsumes non-dominant perspectives to create “consensus.”

More than simply allowing people to talk across difference, a model of public epistemic humility and discovery pushes back against consensus as a goal of the public sphere while simultaneously answering criticisms of divisiveness and tribalism. While Irigaray highlights the divide between individuals that cannot be crossed, she sees the purpose of recognizing the negative space of ethical respect, the reciprocal transcendence of two individuals, as bringing different individuals and subsequently different identity groups closer together. While recognition means being unable to be the other individual or master them, she states that “it’s this negative that enables me to go towards you.”³² Going toward the Other requires a reciprocation of epistemic responsibility, that each individual adopts this quest toward recognition and knowing another. Irigaray explains that “I go towards that which enables me to become while remaining myself,”³³ highlighting the reciprocation of both epistemic humility and discovery. While these enable us to know other epistemic standpoints, they also allow our own standpoint to be known by others.

Thus far, I have critiqued the underlying focus on consensus in Fraser’s work and argued that through Irigaray’s model for talking, knowing, and loving across sexual difference, we can shift away from consensus and create a model of epistemic humility, discovery, and political empathy to communicate across difference in the public sphere. This shift maintains an explicit focus on a “we” that avoids erasure: Irigaray writes that “I recognize you is the one condition for the existence of *I*, *you*, and *we*. Nor will it ever be

³² Ibid., 104.

³³ Ibid.

neuter, a collective *one*.”³⁴ With this shift away from consensus, a new model of the public sphere opens up: one in which epistemic humility and discovery are part of a new focus. This addresses a need to rethink the basic meaning of the public sphere, not as a space in which consensus is sought between many standpoints, as would be the case in Fraser’s egalitarian society, but rather as a space in which many groups and individuals with many epistemic standpoints seek recognition from a broader public through various modes of confrontation.

LEGITIMATE PUBLIC OPINION

However, this focus is not an end-goal; knowing other epistemic standpoints does not make for a complete public sphere. Rather, this focus of public life helps to achieve the normative legitimacy of public opinion that Fraser places as one of the goals of the public sphere. She argues that “a public sphere is conceived as a space for the communicative generation of public opinion. Insofar as the process is inclusive and fair, publicity is supposed to discredit views that cannot withstand critical scrutiny and to assure the legitimacy of those that do.”³⁵ Adapting an Irigarayan model of intersubjective communication to the public sphere, the goal becomes to improve both the inclusivity and fairness of the public sphere in order to improve the legitimacy of public opinion, not through reaching consensus in the ideal egalitarian structure that Fraser seeks, but in a constantly contested consensus to come. The underlying assumption here is that a more epistemically diverse public landscape will create public opinion that begins to move away from consensus as erasure and toward a formation in which a wider set of epistemic standpoints interact and contest ideas through various methods.

I would like to emphasize again that the lack of consensus in this model of the public sphere does not mean that public

³⁴ Ibid.

³⁵ Nancy Fraser, “Transnationalizing the Public Sphere: On the Legitimacy and Efficacy of Public Opinion in a Post-Westphalian World,” *Theory, Culture, and Society* 24 no. 7 (2007): 7.

spheres necessarily become divisive spaces prone to tribalism. Arditì worries that in Nancy Fraser's conception of multiple publics, "parallelism without any further qualification can lead to the proliferation of self-enclosed publics of women, gays, blacks or immigrants coexisting in a progressive apartheid of sorts."³⁶ This is the type of criticism that my adapted Irigarayan model of political intersubjective communication is attempting to overcome. Instead of lacking the communication between publics that Arditì is concerned about, a stance of epistemic humility and discovery aims to reach out across the negative between members of various publics without seeking mastery over the other epistemic standpoint. This lack of mastery points to the continuing commitment required by knowers in this epistemic framework, and of citizens within this model of the public sphere. It is here that I borrow somewhat from Arditì's conception of the public sphere. He writes that "[d]isagreement without reconciliation becomes not so much the sign of the failure of democratic politics and the public realm as rather their constitutive marker."³⁷ Disagreement, however, need not mean harmful divisiveness, but rather the Irigarayan recognition of other epistemic standpoints without the conquest of consensus, the subsuming of other views into one's own. Consensus then takes a similar position in the public sphere as Arditì sees equality occupying. He explains that "[e]quality turns out to be episodic because it is a presupposition that must be verified time and again: its pursuit is a task of Sisyphus and its champions will never be rewarded with a seventh day of rest in the shape of an egalitarian society."³⁸ Similarly, consensus, achieved in a way that truly recognizes the many epistemic standpoints in the public sphere, is in the same category of Sisyphean tasks. Any notion of consensus in public opinion must be tested through the public sphere through a model of epistemic discovery and utilizing a better intersubjective language than what we possess today.

³⁶ Benjamin Arditì, "Disagreement Without Reconciliation: Democracy, Equality and the Public Realm," *Critical Review of International Social and Political Philosophy* 12 no. 2 (2009): 171.

³⁷ *Ibid.*, 178.

³⁸ *Ibid.*

Consensus in a public sphere of epistemically humble knowers and citizens becomes a “consensus to come.”

This new formulation of the public sphere seeks to fulfill the major task of normative legitimacy that Fraser assigns to the public sphere. Without assuming the necessity of egalitarian structures, this model instead encourages creative ways of confronting publics and a method through which to engage with these confrontations. A reformulation as such frames the public sphere as a space in which ones does not primarily seek to “conquer” other opinions via consensus, but rather to be confronted by other epistemic standpoints.

It is important that this form of recognition not be confused with the reconciliation that Arditì worries about. Irigarayan recognition, in the political application I have laid out, establishes a focus on the person confronted by the political Other. Arditì discusses ways in which excluded and marginalized groups “go public,” confronting those included in public spheres with their epistemic standpoint. An Irigarayan recognition applied to this political project seeks to establish how this interaction between the two might continue “post-confrontation” without erasing the opposition between the two at the cost of the Other. While Arditì focuses on the nature of this confrontation as a necessarily continuous interaction, it need not forgo any hope of significant change to the relationships within public spheres and between publics through this added focus on interaction after the confrontation.

Thus far, I have laid out my conception of the public sphere. I have embraced the notion of the public sphere as a space of confrontation and articulated a framework for improving the receptivity of individuals within this space, aiming for a greater possibility of epistemic discovery. It will be objected here that this is an overly idealistic task. Especially in our present political climate, imagining the majority of individuals adopting this kind of stance seems unlikely or even impossible. The models of the public sphere that were conceived of before social media and digital public spheres encounter the unforeseen obstacles of the divisiveness, partly facilitated by various digital platforms, that we now

experience as a norm. In the next section of this paper, I will apply this model to a specific technological structure of public spheres today, which is the structure of algorithmic media production and consumption. While the research on algorithms' effect on public interaction supports a skepticism toward the possibility of a public sphere built on epistemically humility, I will, in a more speculative manner, propose ways in which this structure may be turned to move toward this model of the public sphere. In this sense, I toe the line of a theory of the public sphere that Fraser might argue does not have sufficient grounding in existing structures and relations; however, I think that, now more than ever, it is important that we develop a strong account of what the public sphere ought to do while we simultaneously look to the existing reality and ask how we might get there.

DIGITAL PUBLIC SPHERES: ALGORITHMIC INTERACTION

Algorithms are a significant factor in how we interact with both other people and information in digital spaces. Algorithms help to sift through the massive amounts of information and data that we are presented with on the web. The significance of algorithmic media production and consumption lies not only in its structuring of direct interaction in digital public spheres, but also in the underlying structure of the information landscape on which these public spheres rest. Algorithms are a structure of automated information consumption; this both limits the scope of information an individual consumes based on epistemic standpoint, but also places the practice of information consumption and interaction with others outside the intentionality of individuals. That is, who we interact with—both directly and through the epistemic standpoints we are exposed to and confronted by—is often outside of our direct control. Roberto Simanowski points out that “algorithms are not only instructions to guiding technological processes...they are always also the implementation of such

instructions outside human control or regulation.”³⁹ A critical view of the automated structures of information/media consumption and production’s effect on the public sphere will help challenge the existing structure of digital public spheres and determine how to proceed toward a model in which productive confrontation and epistemic discovery are centered in public interaction.

Perhaps the most obvious aspect of algorithmic structures of information consumption is its selective nature. Algorithms are made to select information for individuals to view from the vast amount of information present on the internet. Currently, the basis of this selection is personalization: what does the individual want to see based on the data collected about them? Much of data collection is currently used for capitalist pursuits, with data being used to analyze and predict the behavior of individuals as consumers and profit from these predictive models.⁴⁰ Automated personalization, however, presents a major obstacle to the confrontation of different epistemic standpoints. The “filter bubble”⁴¹ becomes a structure of epistemological ignorance. Critical race theorists and feminist theorists have long analyzed the ways in which epistemological ignorance is created and maintained to exclude certain groups from mainstream society. While I have discussed Fraser’s analysis of political exclusion and Code’s argument against an epistemological framework that ignores the standpoints of other groups of knowers,

³⁹ Roberto Simanowski, *Data Love: The Seduction and Betrayal of Digital Technologies* (New York: Columbia University Press, 2016), 51. Philip Napoli also points out this uncontrolled aspect of algorithms, saying that they “operate on equal footing with human actors to affect social conditions. Algorithms possess what scholars of organizations and technology have termed ‘material agency’—the capacity for nonhuman entities to act absent of sustained human intervention.” Philip M. Napoli, “Automated Media: An Institutional Theory Perspective on Algorithmic Media Production and Consumption,” *Communication Theory* 24, (2014): 344.

⁴⁰ Although targeted advertising is a large part of the business of data, Simanowski points out that “data mining does not thrive on personalized advertisement alone; it shows that in an information society profit flows from the trade of information in general and that, quite naturally, it is made by those who are able to broker it.” Simanowski, *Data Love*, 38.

⁴¹ Eli Pariser, *The Filter Bubble: How the New Personalized Web is Changing What We Read and How We Think* (New York: Penguin, 2011).

structure user behaviors, impact preference formation and impact content production decisions.” This, of course, means that they help to form the ways in which we interact with other members of the public(s) and with other ideas, hence other epistemic standpoints. While there is much discussion today about individuals not hearing opinions contrary to their own, there is a deeper sense in which algorithmically structured public spheres, as they are currently constructed, prevent the discovery and knowing of other epistemic standpoints through a model centered on the self rather than others.

This personalized structure through which we interact with information is a foundation on which the public sphere rests. If our interaction with information is changed through algorithmic personalization, then so too is our public interaction. We are not confronted with other standpoints, other basic identities and epistemic ways of being. Without the initial confrontation, there is no longer a catalyst for needing a stance of epistemic humility in order to interact with that standpoint after the initial confrontation. From the very first step, the goal of my reformulated public sphere is prevented by the existing structure.

Importantly, there has always been a tendency for individuals to consume media and information along their preference lines; however, Pariser points out that the difference with algorithmic consumption is that the individual is alone within the “filter bubble.” Removed not only from a broader public, but from any smaller publics as well, the individual immersed in an algorithmic digital framework may be living a truly private life, in the most public way possible. If this bubble is produced based on our preferences, the type of confrontation that Ardit and Fraser see as necessary to public life does not take place, for it is precisely what—or who—the individual does not want to be, or does not think of being, confronted by that must confront them. In this sense, digital spaces like social media sites become a farce of public life.

The framework’s side-effects in the isolation of the public individual are exactly that: side-effects. Most of this personalization is aimed at ad revenue, with personalization seeking to increase

there is a rich tradition of confronting various ways in which these structures of ignorance are created and maintained.⁴² An analysis of “algorithmically upheld” epistemological ignorance follows this established trail.

In analyzing algorithmic media consumption and production through the lens of institutional theory, Philip M. Napoli points out that algorithms “have the capacity to directly structure user behaviors, impact preference formation and impact content production decisions.”⁴³ This, of course, means that they help to form the ways in which we interact with other members of the public(s) and with other ideas, hence other epistemic standpoints. While there is much discussion today about individuals not hearing opinions contrary to their own, there is a deeper sense in which algorithmically structured public spheres, as they are currently constructed, prevent the discovery and knowing of other epistemic standpoints through a model centered on the self rather than others.

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⁴² Cf. Charles Mills, *The Racial Contract* (Ithaca, NY: Cornell University Press, 2014); Simone De Beauvoir, *The Second Sex* (New York: Random House, 2014); Carole Pateman, *The Sexual Contract* (Stanford, CA: Stanford University Press, 1988); etc.

⁴³ Philip M. Napoli, “Automated Media: An Institutional Theory Perspective on Algorithmic Media Production and Consumption,” *Communication Theory* 24, (2014): 343.

with algorithmic consumption is that the individual is alone within the “filter bubble.”⁴⁴ Removed not only from a broader public, but from any smaller publics as well, the individual immersed in an algorithmic digital framework may be living a truly private life, in the most public way possible. If this bubble is produced based on our preferences, the type of confrontation that Arditì and Fraser see as necessary to public life does not take place, for it is precisely what—or who—the individual *does not* want to be, or does not think of being, confronted by that must confront them. In this sense, digital spaces like social media sites become a farce of public life.

The framework’s side-effects in the isolation of the public individual are exactly that: side-effects. Most of this personalization is aimed at ad revenue, with personalization seeking to increase the efficacy of ads and to keep users on pages longer, generating more ad revenue for the company that owns the website. However, Pariser rightly points out that “the algorithms that orchestrate our ads are starting to orchestrate our lives.”⁴⁵ Simanowski takes a particularly cynical stance on the effects of algorithmic structures, worrying that the developers in the technology industry are “either unwilling or unable to judge the cultural implications of their technical inventions both because of the characteristics of their profession or simply because of their age.”⁴⁶ While the latter claim may be ignored for its dismissiveness, the strictly profit-based framework in which the goals of algorithms have been developed may be the key to why the social-political issues caused by them have been so long overlooked or unchanged.

Of course, this oversight has come to an end, especially in the past few years. From data leaks from major companies,

⁴⁴ He also outlines two other significant differences: that the filter bubble is invisible and that it one does not choose to enter it, arguing that, for example, a viewer of a conservative or liberal news channel both knows it is biased and chooses to view it. It does not seem, however, that all viewers of these channels know that they are biased and, furthermore, that you can say that it is a conscious choice to stay within our preferences. Pariser, *The Filter Bubble*, 9.

⁴⁵ Pariser, *The Filter Bubble*, 9.

⁴⁶ Simanowski, *Data Love*, 42.

to Russian meddling in elections, to the misuse of personal data by Cambridge Analytica to run targeted political ads, there is widespread concern over the methods of monetizing user data utilized by tech companies. Two of the major concerns throughout these events have been the privacy of individuals' data and the influence in democratic processes by foreign "bad actors." However, the concern about these happenings should also happen at a much more fundamental level: algorithmic media consumption and production affects our lives and how we publicly interact. Through personalization it prevents deeper epistemic confrontation from occurring, or at least decreases its frequency. Without these confrontations, the development of epistemic humility becomes a serious challenge when we are, as Pariser describes it, "indoctrinat[ed] with our own ideas."⁴⁷ Simanowski also expresses concern about the digital structures of public interaction:

From the perspective of cultural philosophy, such market-driven customization is counterproductive. Here reading is also understood as a conflict between author and reader, or between director and viewer, for the predominance of a reality model. Readerships and audiences can only win this fight when they lose it, that is, when they learn to see reality from a different, from a new, perspective.⁴⁸

This conflict followed by epistemic discovery is exactly what Simanowski sees as being lost in a digital structure of public interaction constructed with profit-maximization in mind. He points to the epistemic confrontation found in literature or art as a model of what kind of interaction these digital spaces might be aimed toward.

CONCLUSION

I have argued that digital spaces presently have two major characteristics that are damaging to the public sphere. First,

⁴⁷ Pariser, *Filter Bubble*, 15.

⁴⁸ Simanowski, *Data Love*, 41.

they are aimed at profit. This is fundamentally at odds with any formulation of the public sphere that aims at social good because the best model of profit maximization seems to be making sure digital spaces are personalized, which is the second characteristic. This personalization leads to the isolation of individuals and the retreat from public life through a lack of confrontation by other epistemic standpoints.

Although a definitive solution to these issues is beyond the scope of this paper, I will conclude by offering some speculation on possibilities. These fall into two categories: ways in which to redirect the goals of algorithmic digital structures toward social good that strives to improve the public sphere, and non-digital spaces in which the public sphere may still feasibly be maintained in the formulation that I have argued for.

As Simanowski argues and perhaps hopes, algorithmic personalization and profit maximization do not have to be the sole-model of digital interaction. He points out the early hope of the Internet as “a place of utopian and heterotopian promise” as the “anarchic medium.”⁴⁹ It is this early sense of hope to which my argument about the possibilities of confrontation and empathy in the public sphere can be linked. However, it seems plausible to venture that if our data can be used to construct a disturbingly accurate description of us in order to personalize our content, it could be used to *de-personalize* it as well. Digital spaces in which confrontation is encouraged could be a re-modeled use of algorithmic personalization, modelled on something like Iris Marion-Young’s concept of “city life” as a normative ideal, in which strangers are encouraged to interact outside of their smaller communities in “the more open public of politics, commerce, and festival, where strangers meet and interact.”⁵⁰ Similarly to a model of epistemic discovery and empathy, she conceives city life as one in which strangers must be together in a structure that does not dissolve difference into unity or homogeneity. While there is a

⁴⁹ Simanowski, *Data Love*, 42.

⁵⁰ Iris Marion-Young, *Justice and the Politics of Difference* (Princeton, NJ: Princeton University Press, 1990), 237.

sense in which algorithms only amplify a human tendency toward self-isolation, there is an optimistic outcome to this observation: algorithms also provide a definitive structure that may be changed to encourage epistemic confrontation, just as shared, physical spaces in cities force strangers to interact.

Would the dialogical communication that Irigaray seeks be possible in a digital setting? After all, as stated previously, recognition and knowing another requires more than just hearing other opinions. If it was possible for algorithms to be rewritten to force more, rather than less, confrontation, they would still need to facilitate the type of recognition that Irigaray describes, or the sense of knowing another that Code articulates. This highlights one of the major issues with making a serious claim to a re-direction of algorithmic structures toward social good: tech companies do not reveal their algorithms. The general public does not know through what algorithms companies like Facebook decide which ads or posts individuals see. This makes it difficult to make definitive claims about what a re-direction of algorithmic media consumption might look like and what potential change could result from it; however, it is an important option to investigate in further research within the framework I have laid out. The potential for successful dialogical communication in digital public spheres seems to rest upon the accuracy with which algorithms can predict user behavior. Because algorithms are based in “if, then” statements, the more accurate the “then” is, the more effective the algorithm is in achieving its aim. Currently, algorithms are sometimes disturbingly accurate in predicting user behavior in order to increase profits in various ways based on collected data. The basis of accurate behavior prediction is already present, but what must be changed is the aim.

The latter suggestion, the use of non-digital, “real-life” spaces, seeks to reinstate confrontation as constitutive of the public sphere through tried and true methods. Other means of confrontation, like artwork and street protests, are means by which marginalized or excluded publics may seek to go public and gain access to established, mainstream public spheres. A discussion for another paper is the value of these methods and spaces compared to digital spaces. Importantly, these spaces can be viewed in

conjunction with digital spaces. Instead of applying a theory of the public sphere to *just* digital spaces or “analog” spaces, one could look at the ways in which all of these spaces could work together to facilitate the aim of ethical recognition and dialogical communication. One might be confronted by the recently opened lynching memorial in Alabama and bring discussion of it based on that confrontation to online spaces. Someone might be confronted by another perspective on a digital platform and reflect on that confrontation via experiences in non-digital spaces, discussing that experience face-to-face with peers, coworkers, or friends.

Regardless of the value of digital versus non-digital spaces, the proliferation of digital spaces requires that we assess their use in the context of the public sphere and public opinion. Through an initial critique of Fraser’s public sphere, taking up the fruitful aspects of her project while reformulating others, I have applied the model of the public sphere as a space of humility, confrontation, discovery, and empathy to digital public spheres. The current structures and driving motivations of these spheres pose significant obstacles to the realization of my model of the public sphere; however, there are fundamentally different motivations that may be able to create alternative digital spaces in which epistemic humility and discovery, confrontation of opposing epistemic standpoints, and political empathy across difference may all be central focuses of the space and of public interaction. In order to move toward the realization of these ideals, the structures of information on which digital public spheres rest must continually be confronted to understand the ways in which they change those spaces.

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Fox Mask
by Ruby Shearon

Artist Statement

Ruby Shearon

The tradition of creating and wearing masks stems from at least 30,000 years of human history across many different cultures. This project draws from a fascination with past traditions, evoking a return to ancient times where the natural world and spirit world served as guides for humankind. Masks were created as a linkage between the human world and the world of the unknown—giving form to various guises far from the conscious self, but closer to the mind. Masks and costumes worn in rituals accompanied with music and dance were used to channel transcendental energies into this world, while creating an unrecognizable identity to ward off evil forces and blur the lines between what is human and what is not.

I chose an interdisciplinary approach to process; paper maché, painting, sewing, and traditional black and white film photography allows me to create an immersive element behind the work. By placing these masked figures in indistinct natural settings and capturing them with the intensity of black and white photography, I hope to encourage the viewer to create their own fantastical stories surrounding each masked character and think beyond our everyday human existence.

Artist Statement

Jesse Raven

My work is a subjective exploration of the immateriality of light, representing my own sensitivity to everyday experiences of ephemerality. My interest lies in developing visual poetry to meditate on broader concepts of consciousness, perception, and time. My art is a representation of the play between light and shadow, form and formlessness, and their ability to act as metaphors for the duality of being and nothingness.

I want my work to hold space for stillness, vulnerability, and quiet contemplation. Through an observance of light, shadow, and botanical forms, I aim to evoke the poetic power of subtlety, mundanity, and transience.

I use a variety of media and techniques in an attempt to capture the elusiveness of light and shadow as it relates to movement in time. My practice includes collection, assemblage, and study of natural materials, as well as painting, drawing, printmaking, papermaking, and shadow installations. I prefer a multidisciplinary approach, as I think it allows for a more wholistic expression of an idea.

My aesthetic focus doubles as a spiritual one; I also practice careful observation, meditation, and writing as ways to influence and guide my work.

This is an invitation to appreciate the beauty present in what some might overlook as mundane; an ability to see strength and softness in each other; a subtle, sacred affirmation.

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