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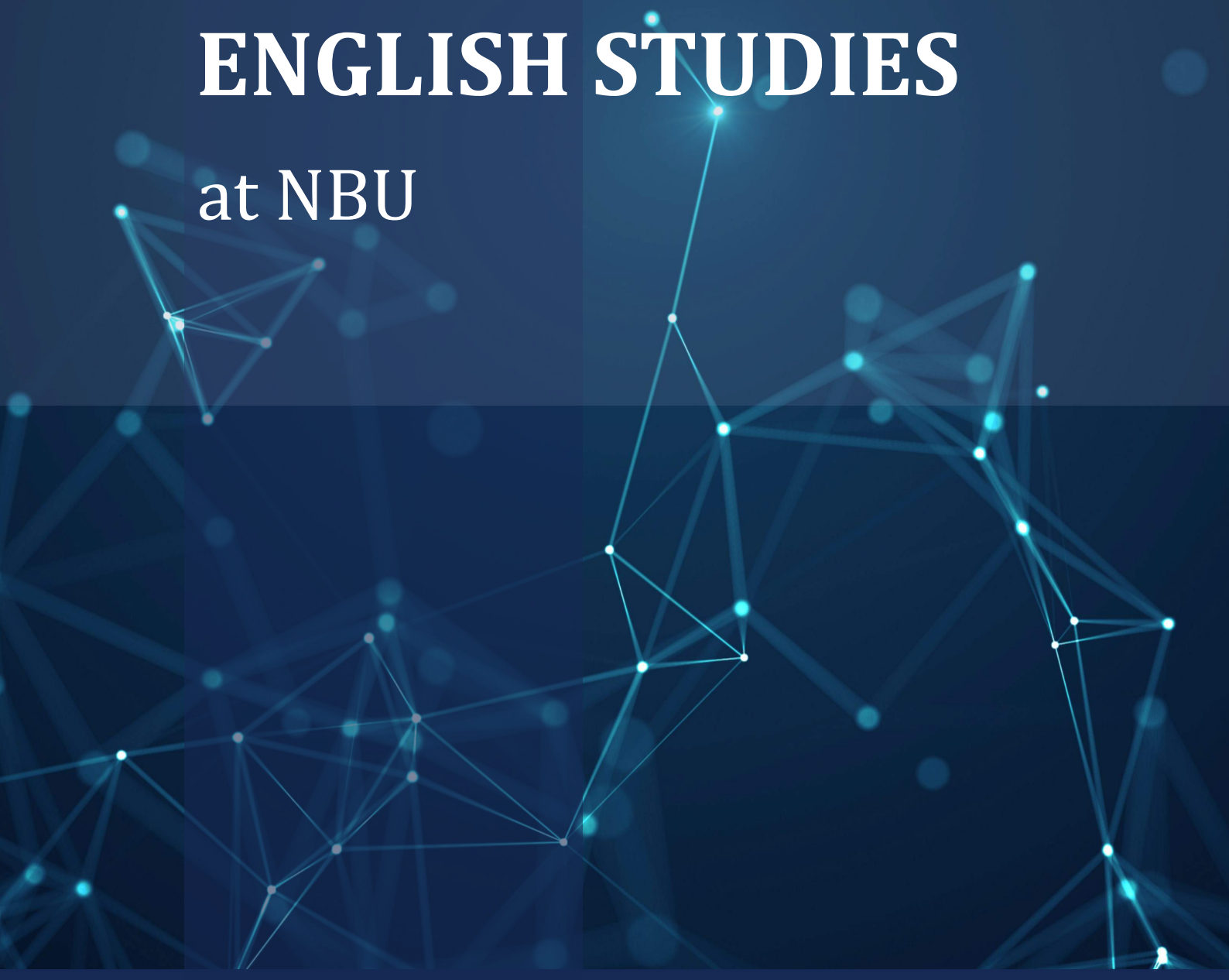

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EDITORS' MESSAGE

Boris Naimushin,

Editor in Chief

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Stan Bogdanov,

Managing Editor

Let your dreams reach new heights as we step into the New Year!

As we close out 2024, we want to extend our warmest holiday greetings and best wishes for the year ahead. This year marks a special milestone as *English Studies at NBU* celebrates its 10th anniversary! We are immensely grateful to all our authors, reviewers, and readers for their unwavering support over the past decade. Your dedication and contributions have made our journal a thriving platform for insightful research.

One of the important news is that our Diamond Open Access journal is moving from a CC BY-NC (Attribution-NonCommercial) license to a CC BY (Attribution) license. For the past ten years, we used the NC clause to prevent commercial use of our content, thinking it would protect the work of our authors. However, this restriction ended up creating confusion about what "non-commercial" really means. As a result, some databases, especially those run by for-profit companies, chose not to include our journal, limiting its reach and visibility. After reviewing our experience and considering trends in open access publishing, we realized that the NC clause was actually holding us back. Switching to a CC BY license will make it easier for educators, researchers, and platforms to share and use our content freely, helping us reach a broader audience and increase citations. This change reflects our commitment to open science, removing barriers to access and encouraging more people to engage with the research we publish. Going forward, we'll be tracking how this shift affects our visibility, citations, and overall impact in the academic community.

Wishing you a bright and joyful New Year!

Cheers to 2025 and to many more successful years ahead!

Boris and Stan

In this issue:

Yana Rowland examines Elizabeth Barrett Browning's *The Runaway Slave at Pilgrim's Point*, focusing on themes of infanticide, identity, and the self-Other dynamic. It situates the poem in the 19th-century literary and philosophical discourse, addressing the moral and existential crises of the enslaved Black mother who kills her mixed-race child to reject oppression. Drawing on Levinas' philosophy, it explores the poem's portrayal of the face as a site of moral responsibility and how infanticide reflects self-defacement and identity loss. The text contextualizes the poem within Barrett Browning's abolitionist convictions,

personal struggles, and the broader Victorian concerns about motherhood, racial injustice, and autobiographical storytelling. Linking the poem to works by Brontë, Blake, and others, the study highlights the recurring motifs of child suffering, social inequality, and the adult's moral accountability. Ultimately, it frames the poem as a critique of systemic oppression and a meditation on guilt, agency, and redemption.

Barbara Miceli offers an analysis of Joyce Carol Oates' *My Sister, My Love*, a fictionalized account inspired by the JonBenét Ramsey murder case. It explores how Oates critiques suburban culture and child exploitation by adapting the real-life tragedy into a satirical memoir narrated by the victim's brother, Skyler. Themes include parental ambition, commodification of children, and the psychological damage caused by excessive control and neglect. Oates' narrative highlights societal obsessions with appearance and success, portraying the victim, Bliss, as a symbol of lost innocence. The text also connects the story to broader discussions of abuse, neglect, and suburban dysfunction.

Nazım Çapkın analyzes Charles Lamb's *The Essays of Elia* particularly his use of the persona "Elia" as a method of exploring identity and challenging traditional autobiographical writing. Lamb distances himself from conventional self-narratives, blending fact and fiction while reflecting on personal and universal themes like memory, guilt, and everyday life. The essay examines Lamb's detachment from Elia as a literary device, allowing him to critique and reinterpret his life without claiming coherence or finality. Drawing on Derrida's and other theorists' ideas, the article explores how Elia becomes both an alter ego and a lens through which Lamb examines his existence and society.

Ayşegül Turan analyses Nuruddin Farah's novel *Links*, focusing on fragmented nationhood, identity, and belonging in the context of Somalia's civil war. Through the exilic protagonist Jeebleh's return to Mogadishu, it explores tensions between national and transnational identities, emphasizing the impact of clan politics and historical violence. Farah portrays alternative spaces like the Refuge that promote unity beyond clan loyalties, and critiques media and international interventions. The use of Dante's *Inferno* underscores Mogadishu's portrayal as a modern hell. Ultimately, the novel interrogates Somalia's transformation, highlighting the interplay between personal and national identity within a broader global framework.

Mohammadreza Shayanpoor and Farzad Kolahjooei examine Julian Barnes' *England, England* through Jean Baudrillard's theory of hyperreality, exploring how simulation replaces reality in postmodern society. It focuses on a fictional theme park replicating England's culture and heritage, which ultimately overtakes the "real" England. Barnes critiques how authenticity dissolves as simulations become self-referential, drawing parallels with Baudrillard's ideas about Disneyland and hypermarkets as symbols of artificiality. Themes include the commodification of culture, cloning of national identity, and the actors embodying their roles so deeply they blur reality. The novel highlights the loss of genuine national identity and the dominance of simulation in contemporary life.

Georgi Niagolov analyses William Shakespeare's *The Merchant of Venice* as a "problem play" due to its genre ambiguity and exploration of "unpleasant" issues like antisemitism, xenophobia, racism, homoeroticism, and patriarchalism. It highlights Shylock's complex portrayal as both villain and victim, contrasting with stereotypes of the era. The play juxtaposes patriarchal Venice and romantic Belmont, where women struggle against male dominance.

Gardev's 2024 Bulgarian production intensifies the play's "unpleasantness," depicting toxic masculinity and inequality while suppressing its feminist themes. Reflecting on historical and contemporary contexts, the article emphasizes the relevance of Shakespeare's call for shared humanity to confront enduring inequalities.

Diana Yankova provides a comprehensive overview of the evolution and impact of online education, tracing its roots from correspondence courses in the late 19th century to modern digital platforms. It highlights technological advancements, such as the internet, MOOCs, and AI, which have expanded access and flexibility in learning. The article discusses the benefits, including accessibility and personalized education, alongside challenges like the digital divide, lack of social interaction, and increased workload for educators. It emphasizes the growing role of online education in reshaping traditional learning models and its potential for future innovation with technologies like VR and AR.

Marcela Fărcaşiu examines the challenges and strategies involved in subtitling culture-bound items (CBIs) in Romanian translations of the crime drama *Southland*. It highlights the role of subtitling as a cost-effective alternative to dubbing, emphasizing its significance for accessibility, foreign language education, and cultural adaptation. Using Jan Pedersen's model, the study analyses translation strategies such as retention, cultural substitution, and paraphrasing. It underscores the complexities of adapting American police jargon and cultural references for Romanian audiences while maintaining cultural authenticity. The findings contribute to audiovisual translation research and propose refinements to existing subtitling frameworks to address emerging translation practices.

Fatma Yuvayapan and Hayriye Bilginer explore acknowledgments in Ph.D. theses as a distinct academic genre, analysing their linguistic and cultural features in English, German, and Turkish. They investigate reasons for thanking (academic, moral, and resources-related), linguistic patterns (e.g., performative verbs, nominalizations), and pronoun usage across the three languages. The study highlights how acknowledgments reflect cultural norms and academic conventions, balancing personal gratitude with professional identity. Findings show significant cross-cultural variations, such as German preferences for nominalizations and implicit gratitude, and Turkish emphasis on family support. The research emphasizes acknowledgments' deeper role in expressing academic identity and fostering scholarly communication.

Mariia Shutova, Yaroslava Gnezdilova, Halyna Minchak, Svitlana Talko explore the semantic and conceptual features of anthroposemic substantival bahuvrihi with zoonym components (ASBZC) in English. They employ methods such as semantic and componential analysis, descriptive classification, and linguistic modelling to investigate how these compounds, like "lion-heart" or "birdbrain," convey characteristics of humans through zoonyms. The study reveals ASBZCs reflect biological, mental, and social aspects of humans, often utilizing metonymy and metaphor for meaning making. The results of the study show that negative connotations dominate mental traits, while biological and social dimensions are more neutral or positive, highlighting ASBZCs' cognitive and linguistic complexity.

Stay tuned for more exciting updates and insightful articles in the forthcoming issues.

As always, your feedback and suggestions are invaluable to us.

Happy reading!

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EMBRACING FULL OPENNESS: TRANSITIONING ESNBU FROM CC BY-NC TO CC BY

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Abstract

This editorial explores the rationale behind transitioning the ESNBU journal's content licensing from CC BY-NC (Attribution-NonCommercial) to CC BY (Attribution). For a decade, the journal operated under the CC BY-NC license to restrict commercial use, but this approach has unintentionally limited its reach and visibility. The objective is to address these limitations and promote unrestricted dissemination of scholarly content. The analysis involved a review of the journal's indexing history, feedback from database providers, and usage statistics over the past ten years. We examined cases where the NC clause hindered the journal's inclusion in databases, especially those operated by commercial or for-profit entities. We also reviewed existing literature on licensing impacts in open access publishing to understand broader trends and potential benefits of a transition to CC BY. The study found that the NonCommercial restriction created significant barriers to the journal's visibility and dissemination. Several commercial and academic databases opted not to index the journal's content due to ambiguity around the "commercial use" clause. By transitioning to a CC BY license, we anticipate enhanced indexing opportunities, increased content integration into educational resources, and a broader reach, ultimately leading to higher citation rates and greater impact. Moving to a CC BY license aligns the journal with the principles of Open Science, fostering unrestricted access to knowledge. This change supports wider dissemination, potential for increased collaboration, and enhanced visibility in academic databases. Future analysis will focus on measuring the impact of this transition on the journal's citation metrics, user engagement, and overall accessibility.

Keywords: Diamond Open Access, Creative Commons licensing, NonCommercial restriction, licensing transition, educational content use, Open Science

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In the evolving landscape of scholarly communication, Diamond Open Access (Diamond OA) journals have emerged as a vital player. With no fees for authors or readers, Diamond OA offers an inclusive model, enabling equitable access to knowledge. However, the nuances of content licensing remain a critical consideration in realizing the full potential of open access. One key issue is the choice of Creative Commons licenses.

ESNBU Background

English Studies at NBU (ESNBU) was launched as an Open Access journal in 2015 publishing articles in Language and Linguistics. Since the launch of the journal, published articles have been licensed as CC BY-NC. The justifications for this decision are manifold as ESNBU wished to consider the overall benefits for both the journal and the authors.

Advantages for the journal

The authors retain full copyright so the journal, with the limited resources it operates with, would not be involved in maintaining copyright of the articles, nor would it be involved in expensive litigation for breaches - "It is the author's responsibility to bring an infringement action if so desired by the author", as worded in the ESNBU Policy.

Advantages for the authors

In combination with the full author's rights retention, an article published under an NC license, on the other hand, would not prevent the authors from monetizing their work.

> As with all CC licenses, the NC licenses only restrict what a reuser may do under the license and not what the licensor (rights holder) can do. Licensors that make their works available under an NC license are always free to monetize their works. (CreativeCommons, 2017)

For the past decade, *English Studies at NBU*, as a Diamond Open Access journal, has operated under a CC BY-NC (Attribution-NonCommercial) license. This approach was initially chosen to ensure that content remained freely accessible while protecting it from potential commercial exploitation. However, over time, it became evident that this restrictive licensing decision has had unintended consequences on the journal's reach and impact.

While the journal has been indexed in several prominent databases, others have declined to include our content due to the NonCommercial (NC) clause. Some of these are for-profit or commercially managed platforms that were hesitant to engage with material released and labelled as "non-commercial." Additionally, some non-commercial academic databases, confused by the ambiguities surrounding what constitutes a "commercial use," opted not to ingest our articles, fearing potential legal repercussions. This uncertainty limited ESNBU's visibility and the potential for wider dissemination, despite its commitment to Open Access and Open Science.

The Limitation of CC BY-NC

The CC BY-NC license, although well-intentioned, has shown several limitations in practice. The "NonCommercial" restriction creates ambiguity, as there is no clear definition of what constitutes "commercial use". For example, the educational use by for-profit institutions. Universities and schools that operate on a for-profit basis often question whether they can freely use NC-licensed material in their coursework.

Klimpel (2021) discusses that the educational landscape is made up of many small and medium-sized businesses, as well as freelancers and self-employed individuals who need to operate sustainably. It also includes cooperatively organized educational providers and associations that may gain economic advantages through their activities. Even non-profit organizations often receive monetary payments, and if they are not entirely funded by public sources or donations, they must engage in some form of commercial activity to remain viable. Thus, many educational stakeholders, beyond public school and university teachers or civil servants, need to generate income as part of their work.

As already noted, it is challenging to define clearly what qualifies as "commercial use," leading many to avoid NC-licensed content whenever any kind of payment or monetary benefit is involved, even if such use might technically be allowed. This uncertainty creates a strong deterrent, especially for professionals in the educational sector outside of state-run schools, who worry about unintentionally violating the license. In the education and training sector, many institutions rely on their own revenue streams, as they are not fully funded by public sources. Because they depend on course fees, they are often classified as commercial entities, which means they cannot use content licensed

with a CC BY-NC (NonCommercial) clause without obtaining the author's permission. (Wikimedia, 2024)

On the other hand, there are various uses that are desirable from an educational perspective. An example of this would be newspaper reporting and any form of media coverage, where the use of content would be considered commercial even though this reporting is desirable from the perspective of a school or another educational institution, or in our case of reporting scientific results.

By using the NC license, ESNBU has been somewhat incongruent with the definition of Open Access in the Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities, thus:

> The author(s) and right holder(s) of such contributions grant(s) **to all users** a free, irrevocable, worldwide, right of access to, and a license to copy, use, distribute, transmit and display the work publicly and to make and distribute derivative works, **in any digital medium for any responsible purpose**, subject to proper attribution of authorship (community standards, will continue to provide the mechanism for enforcement of proper attribution and responsible use of the published work, as they do now), as well as the right to make small numbers of printed copies for their personal use. (emphasis mine) (Open Access Initiatives of the Max Planck Society, 2003)

The NonCommercial clause is restrictive if a reuser of ESNBU's content is a for-profit organisation. "The Berlin Declaration", thus, envisages the most open of the CreativeCommons' licenses, namely the CC BY. Further to that, the restriction to non-commercial use is considered incompatible with the concept of "open content", effectively rendering the ESNBU published content incompatible for inclusion in Open Educational Resources (OER):

> […] ND licenses cannot be combined under any circumstances because editing and thus combining with other materials is excluded. Open educational resources are in any case not compatible with NC or ND licenses. (Klimpel, 2019)

Another hindrance is for commercial academic tools and databases. Platforms that provide access to scholarly content, even if the end users are researchers or students, may

hesitate to include NC-licensed content due to their business model. A very plain example is that "content marked as NC cannot be included in free knowledge databases like Wikipedia, in some kind of open media archives and in open-source projects". (Wikimedia, 2024)

And still another case is the innovative reuse by startups and commercial entities interested in developing educational tools or analysis platforms – they often avoid NC-licensed materials to mitigate legal risks. For example, ESNBU's request to be indexed in the research library of a research AI tool, which would have involved ingestion of our full-text articles, was declined even after discussion with the founders of the for-profit start-up.

Similarly, using NC-licensed content on blogs and in podcasts can also become problematic. Many bloggers display ads to cover hosting costs or earn extra income, making their use of the content potentially commercial, or at least ambiguous under the NC terms. This may well be one of the reasons that ESNBU's content has accrued very few mentions on Altmetric through social media sites, newspapers, policy documents, blogs, Wikipedia and other sources.

In academia, which is the journal's primary publishing audience, attribution is often more important to authors than commercial gain from the published work. Additionally, authors in the SSH disciplines almost never come up with any patentable or otherwise monetizable outcome, but the published work itself. So, protecting particular content (through a NC license) might have some economic value, sometimes but not always, on the theory that attribution may ultimately lead to greater commercial gain overall, for example by including the work in a collection together with other works. A conflict emerges here for the reusers, like commercial publishers, who wish to create a collection for sale because a NC licensed work cannot be mixed with SA (ShareAlike) licensed content, for example. (CreativeCommons, 2017)

Still another grey area for possible conflict may be if the research for a publication is funded and the NC license conflicts with the funder's terms and policies. ESNBU has not specified this in its policies, and we are not yet clear how to act in such cases.

The end result is a significant portion of the scholarly ecosystem choosing to steer clear of our content, reducing its impact and reach.

The Benefits of Transitioning to CC BY

Considering these challenges, transitioning to a CC BY license offers more advantages, the first being broader accessibility: by removing the NonCommercial restriction, ESNBU opens itself to a wider array of uses. Content can be seamlessly integrated into educational resources, commercial databases, and digital tools, amplifying its dissemination without barriers.

The second benefit is increased indexing and visibility. Many academic and research databases, especially those operated by commercial entities, are more likely to ingest our content under a CC BY license, especially now that metadata and full texts are offered by ESNBU for automatic harvesting. This can significantly boost the journal's presence in global research platforms, increasing citations and overall impact.

The third one is clarity and ease of use. The CC BY license is straightforward allowing anyone to use, share, adapt, and build upon the work as long as proper credit is given. This simplicity reduces the hesitancy caused by the ambiguous interpretation of the "NonCommercial" clause, making it easier for libraries, educators, and developers to use the ESNBU content without fear of legal complications.

Aligning with the Principles of Open Science

Adopting a CC BY license is also a step towards aligning with broader Open Science initiatives. ESNBU has long advocated for openness – apart from open access, we have also long offered Open Abstracts, Open Citations, Open References, and we are open to text mining and machine readability. Also, ESNBU’s metadata is released in the public domain under a CC0 1.0 License. However, the NC part clashes with our Diamond OA status and the principles of full openness. Open Science advocates for transparency, collaboration, and unrestricted access to research. The CC BY license embodies these values by removing unnecessary restrictions on content use, thereby enhancing the journal's alignment with the international movement towards a more open and accessible scholarly ecosystem.

Addressing Concerns About Commercial Use

Yet, a primary concern when moving from CC BY-NC to CC BY is the fear of commercial exploitation. However, it's important to remember that the CC BY license still requires appropriate attribution, protecting our author's rights and ensuring recognition. Moreover, most commercial uses of open access content - such as inclusion in educational resources or data mining for research purposes - serve to enhance the visibility and usability of the work rather than exploit it.

By allowing more flexible use of its content, the journal can reach broader audiences and encourage a variety of innovative applications that would otherwise be hindered by restrictive licensing.

Conclusion

As an excuse, when we launched the journal ten years ago, Creative Commons licensing was still new and not very widely adopted in the locale we operate. We ourselves were not very clear about the licensing and bearing in mind the local culture of the academia, we were attempting to prevent our authors from commercial exploitation of their work, but it inadvertently restricted the journal's reach.

After 10 years of operating under the CC BY-NC license, transitioning to CC BY marks a significant evolution for *English Studies at NBU* (ESNBU) as a Diamond Open Access journal. This change represents a commitment to maximizing the accessibility and impact of the research we publish, eliminating barriers that have limited our growth and visibility.

By embracing a fully open license, we are reaffirming our dedication to the principles of Open Access and setting a new standard for inclusivity and accessibility in scholarly publishing. Now that we are more experienced, we aim to remove these barriers, allowing broader dissemination and ingestion of our articles. We look forward to this new chapter, confident that it will enhance the journal's reach, increase its impact, potentially increasing citations and readership, and better serve the authors we publish and the global academic community.

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INFANTICIDE AS SELF-DE-FACEMENT: ELIZABETH BARRETT BROWNING'S "*THE RUNAWAY SLAVE AT PILGRIM'S POINT*"

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Abstract

Based on Elizabeth Barrett Browning's *The Runaway Slave at Pilgrim's Point* (1847), and trusting, at the same time, existential phenomenology and deconstruction, this paper aims at investigating a guilty individual's impulse for self-authorization (and self-narration). It discusses infant mortality, motherhood, and suffering, in which Elizabeth Barrett Browning's oeuvre abounds. Despite the unceasing critical interest in the poet's abolitionist leanings, the ontological uniqueness of *The Runaway Slave* is yet to be explored, having been dominated so far by militantly politicized researches on women's rights, the religious incongruities of Victorian culture, and the wavering solidarity that nineteenth-century England demonstrated for nations struggling under foreign despotism and illiterate self-government. Infanticide could be perceived as an act of self-de-facement, rather than of self-declaration. Considering muteness against the voicedness of the Face, this paper reveals the travail of a Self's inevitable sacrificial exposure to an Other, and by extension, the foundational role of alterity in authorial intentionality.

Key words: Elizabeth Barrett Browning, infanticide, self-de-facement, narrative, responsibility

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> Fear for all that my existence – despite its intentional and conscious innocence – can accomplish in the way of violence and murder. ... Fear that comes to me from the face of the Other. (Levinas, 1999, p. 23)

A Janus-like Creature of Its Own

It would not be hard to predict the range of cultural debates on the dichotomy gender–psyche that a fragment from *The Infanticide Act* (1938), which condemns the unlawful imposition of power of one individual over another, could fuel:

> Where a woman by any wilful act or omission causes the death of her child being a child under the age of twelve months, but at the time of the act or omission the balance of her mind was disturbed by reason of her not having fully recovered from the effect of giving birth to the child or by reason of the effect of lactation consequent upon the birth of the child, then, notwithstanding that the circumstances were such that but for this Act the offence would have amounted to murder, she shall be guilty of felony, to wit of infanticide, and may for such offence be dealt with and punished as if she had been guilty of the offence of manslaughter of the child. (Kohl, 1978, p. 219)

Dwelling on the intellectual and syntactical convolutions of the above definition, I daresay it seems a fairly steady ground[1] for an incriminating depiction of the identity of woman as inseparable from the identity of child. Woman seems assigned, by right of biology, the potential to donate, as well as to deprive. It is this very biology (which presupposes also suffering during labor, and hormonal change resulting in postpartum depression, itself related to breastfeeding) that makes guilt a foreseeable and ineluctable ingredient in the perception of woman as a wrongdoer. A raison-d'etre clue: Woman's chances of self-understanding would become seriously jeopardized if she were severed from her own infant. The act of violation of a child's life was typified in eighteenth- and nineteenth-century Britain as a female act. Woman emerged as both accountable and innocent – a felon by right of her own nature.

As a cultural phenomenon, infanticide has a long history which shows the simultaneity of English society's desires to reveal (and acquit) yet conceal (and calumniate) women of compromised morality and dubious descent, in particular in relation to savage and advanced communities' mentalities of regulating want, physical

[1] *Infanticide Act* (2010, s. 1): https://www.legislation.gov.uk/ukpga/Geo6/1-2/36/section/1/2010-10-04

defects, and moral stigma. In *The Runaway Slave at Pilgrim's Point* (Donaldson et al., 2010, vol. 1, pp. 409-430) a black woman slave soliloquizes over her loss of her beloved – also a black slave, murdered by white men. Raped, and, subsequently, mothering a child by a white master, she decides to erase traces of violence inflicted on her. Resenting the result of her own tragedy – the undesired birth of her infant – she strangles the helpless newborn by way of putting her kerchief over his face, thus depriving her offspring of the master's right over her. An improvised burial service is completed at a grave dug by herself (l. 183-187)[2]. Finally, she could be seen at the place of the arrival of the onetime exiled pilgrim fathers (Donaldson et al., 2010, vol 1, p. 429). She claims sanity of mind: 'I am not mad: I am black'; 'in the name of the white child waiting for [her]', she leaves her white tormentors 'curse-free / In [her] broken heart's disdain' (ll. 218, 250-253). The poem was commissioned by the Boston anti-slavery league and came out in the American *Liberty Bell* in December 1847 (issue of 1848). The narrator is the black woman herself.

Family History and Elizabeth's Ontological Vice

Elizabeth depended on the income her family had amassed from slave-holding and ship-trade on sugar cane grown in their Jamaican estates at Cinnamon Hill. This clashed with her outspoken abolitionist convictions, as well as with her sensitivity for physical trauma and spiritual suffering, as she signalled in her poems describing mourning mothers, orphaned children, yoked martyrs, inflicted death, brittle friendships, and forsaken outcasts. Under the advice of her husband, Robert Browning, Elizabeth was persuaded to change the original title, *Black and Mad at Pilgrim's Point* (Donaldson et al., 2010, 1, pp. 410-414), which spared the foregrounded degree of recognition of the woman slave and yet afforded a more discreet aura for the theme of self-destruction. The poet placed a diversity of accents on the Self and the Other in the course of the narrative, in a disarmingly obliging yet not unambiguous manner open to Levinas' Face-to-Face ontology. Levinas believed that 'The Face is seigniory and defenseless itself. … The face is the locus of the word of God in the other, a non-thematized word. … It is the death of the Other that challenges … good conscience' (Levinas, 1999, pp. 104, 166). Barrett Browning

[2] The Brownings' Correspondence (coded coommonly as 'BC') has been quoted by volume, year of publication, page number(s), date, and letter number. The edition of the Brownings' Correspondence used is the electronic one at https://www.browningscorrespondence.com. The poet's authentic spelling and punctuation in her correspondence, and in her works (see Donaldson et al., 2010, as referenced) have been adhered to.

built the lyrical speaker's identity in a comparatist manner. The black woman identified at once with two equally formidable human presences (and sources of self) who she wanted to remember: Her dead, murdered by her white masters, lover – black, like herself – and her dead, murdered by herself, child – white, unlike herself. God had created, but abandoned her and her enslaved brethren in a world housing other impenetrably-coloured yet blessed creatures and phenomena, peacefully and freely coexisting, 'glad and merry as light' ('a little dark bird', 'a dark stream', 'the dark frogs', 'the darkest night', ll. 29-35). The woman slave, her lover, and her child had no proper names; in their common wretchedness, relativism of importance, and anonymity, they formed a mutually prosopopoeic entity, signifying yet intimidating one another. The female slave repeated her lover's 'name' as a salvatory incantation (l. 78-84), wondering whether she could be a legitimate creation of God (ll. 22-28), interrogating the relevance of her own being: 'I am black, I am black! – … And tender and full was the look he [her lover] gave – / Could a slave look *so* at another slave?' (ll. 57, 61-62). The kernel component of the slave's self-authorizing impulse comprised her partner and her infant whose face she dared not behold for its dazzling and alienating whiteness (ll. 120-121). With both the lover and the child dead by the end of the poem, gone was her own domain of self-identification. The narrative's effect was not recuperative but malignant: It repeated the tragic occurrences without resolving either the woman's pain over the loss of her beloved, or allowing her to forget her infant's outlawed birth and enforced death.

Stuck in an ontological vice, the female slave describes the child on her breast as 'an amulet that hung too slack' (ll. 107-108). The unorthodox rite of burial she performs over her own child (who she has murdered) and her maiden song (which metamorphoses into the song arising from the grave where she has placed her dead infant who wishes to reconcile 'the souls of both of us', ll. 190-196) transform the avenger into a penitent seeking forgiveness. A detestable token of imposed power at first, the child becomes the sole guarantee for redemption for those 'born of the Washington-race': It is in his name that the mother swears readiness to absolve her violators, yet she does not deny responsibility for her atrocious deed, nor does she plead to be martyred. Heaven 'break[s]' the clouds upon the mother's brain (the problematic metaphor in l. 247 suggests at once a blessing and a curse): Her child is 'waiting for' her (l. 250-251), promising reconciliation and alleviation of her solitude. The child is a Levinasian

facilitator of understanding. Its death is its mother's death: She becomes 'no longer able to be able', or to grasp; 'the subject [the mother is] loses its very mastery as a subject' (Levinas, 1987, pp. 72, 74). The exteriority that the child ensures when alive is that necessary 'relationship with a mystery' which is 'a property of space' and which could 'lead the subject back to itself through light' (Levinas, 1987, p. 76). Its disappearance is the dissolution of the woman's own face.

Some Ironies of Self-Confessing

The Runaway Slave at Pilgrim's Point was a response to a request from two American Garrisonians – abolitionists titled thus by critics after the name of the journalist William Lloyd Garrison (1805 – 1879), a proponent of human rights. It emerged in a climate of cultural tension on women's rights, transcontinental communication on slavery (resulting in genre experimentation in the works of women writers, as obvious from *Aurora Leigh* (1856)), and the poet's personal doubts about sanctification of role models, for which her correspondence provided copious clues (see, for, instance, BC 6, 1988, pp. 60-65, 30 Aug 1842, # 999). In writing, Elizabeth found a terrain for meeting social duties: 'people invoke me from America, as if I might be dead. … I have to write for the anti-slavery people at Boston' (BC 11, 1993, pp. 212-215, 1 Dec 1845, # 2122). *The Runaway Slave* was also her avowal to radically-minded American intellectuals James Russell Lowell and Maria Weston Chapman: Separately, each had requested a contribution to the matter of slavery. A confession the poet made to Robert Browning was prompted by a sense of guilt for her ancestors: 'I would give ten towns in Norfolk (if I had them) to own some purer lineage than that of the blood of the slave! – Cursed we are from generation to generation' (BC 11, 1993, pp. 251-253, postmark of 20 Dec 1845, # 2144)!

The word *slave* has a traceable history of its own in Elizabeth's autobiographical writing: It signals a strong sense of duty yet a fanciful desire for escape and protection whereby the poet seeks a private space and time (BC 1, 1984, pp. 212, 4 Mar 1825, # 208; BC 3, 1985, pp. 292-295, 26 Oct 1837, # 594). The Self's own body, mind, and soul get blended with the Other's in a homogeneity which disallows cognizing either's in isolation. A similar tendency has been scrutinized by Meg Jensen who has observed of female self-writing practice that no single 'life experience, … however … formed and disseminated, [could] really [...] provoke 'universality' of empathic response' (Jensen, 2018, p. 67). The

irony is contained in the fact that (as with the fictitiously autobiographical *Aurora Leigh*, or *Sonnets from the Portuguese* – especially # 28, 33, and 42), the confessor risks, at the expense of the universality of experience and emotion they seek through the solidarity that self-narrative invites the reader to partake of – their own individual unity for they are barely able to abstain from succumbing to a connection with the Other through aesthetic experience, which works towards generic typification and collective comprehensibility via intersubjectivity, or 'betweenness' (Jensen, 2018, pp. 68, 77, 79-80).

Paul de Man's astute and succinct reasoning in favor of the predominantly structurally 'representational and cognitive' element of autobiography – of which the incestuous black mother's tale in the scrutinized poem could be an instance – provides substance for the present research. de Man wishes to contest Philippe Lejeune's opinion about the 'contractual, grounded not only in tropes but in speech acts', approach to the act of self-telling, which Lejeune, according to de Man, suggests as the dethronement of 'the signature that gives the contract [of autobiography] its legal' status and leads to the curtailment of the flourishing of the autobiographer's 'epistemological (…) authority' (de Man, 1979, p. 922). The 'specular' (p. 923) in self-cognition cannot be avoided because of the presence of an Other in a Self's account of their own experience, in what has been in physical terms, as well as in the dialogic ingredient that any speech act (in writing, or in oral communication) contains on a perlocutionary level, for a speech act prompts a perception of the time before, as well as after, given an Other's presence as an axial point of provocation and reception. Neither the female slave's black lover, nor her 'white' babe (except for its song from the grave, but with no actual words uttered) are given the license to speak yet their faces speak for them in a way evidential and to the effect of signifying 'language as name and as voice' (p. 926). 'Voiceless entities' are 'made as intelligible and memorable as a face' – these alleged voicelessness-es (God, who remains a silent observer of the woman's crime; the black lover, when still alive, but especially when dead; the babe, who gets no chance to prove himself other than within a violated woman's psyche and space) 'posit the possibility of (…) [a] reply' by the white woman as a speaker of her own life: Such substitution is 'the trope of autobiography' (p. 926). Acts of affectual, responsive doing, and of contemplating, converge and make inter-substitutable woman, lover, child, God, and the white aggressors, on the one hand, and face, look, voice, and language, on the other. de Man may not be easily maneuvered around: Auto-narrative looks like a

gesture of tropifying intentionality through mutuality, which doubles the ontological predicament: '[God] must have cast his work away / Under the feet of his white creatures, / With **a look of scorn**, – that the dusky features / Might be trodden again to clay' (ll. 25-28); 'And **tender and full was the look** he [the black lover] gave – / Could a slave **look** *so* at another slave? – / **I look** at the sky and the sea' (ll. 61-63, emphasis in original); (ll. 103-105); 'My own, own child! I could not bear **/ To look in his face**, it was too white. (…) I tell you all, / **I saw a look that made me mad**! / The master's look …' (ll. 120-121; 142-144); 'I am not mad: I am black, **/ I see you staring in my face'** (ll. 219-220, emphases added).

Philippe Lejeune views a woman's self-narrative as 'a discourse of persecution' which assigns an external Other the role of threat and yet legitimation of the One: The Other helps throw the woman's identity into relief, typifying her as a victim (Lejeune, 1987, p. 209). If writing, or speaking, contains some conciliatory hope, it also embodies the very failure that it seeks to avoid (pp. 211, 214): Women narrators vociferate, yet they fumble for words and leap into mad tirades, which could be a way of looking at the female slave's haunting and obsessive laughter 'Ha, ha!', as she relates, in the greatest of detail, the murder of her own babe (ll. 126, 155, 162). Her verbal agency may not resolve either the weight of her crime, or the burden of her origin ('I am not mad: I am black', l. 218) that define her. The female autobiographical act – of which the black mother's rhetoric of self-interrogation as self-narrative in *The Runaway Slave* presents a special instance – is one of self-disarmament, or self-de-facement, of peeling the disguise of intrepidity and uniqueness that the face has in its potential to metonymize the individual. It is a kind of self-epitaph, self-prohibition, self-affliction, and exodic resolution, stamping exilic narrative as woman's ownmost self-expression. The slave anonymizes yet eulogizes herself. In her addresses to God, her white masters, her murdered lover, and her dead infant, the black woman ruins the prop of her own understanding, proving that any act of speech is autobiographical to the extent that it is one of accountability – a request to an Other to partake of her deed (de Man, 1979, pp. 921-922). Such an act is at once causative and responsive, a 'chaismic figure (…) crossing the conditions of death and of life with the attributes of speech and of silence' (p. 927). Which would also suit Lejeune's reflections (developed in "The Autobiographical Pact"): While narrator and principal character coincide, it is the "I" of discourse that defines the individual, and not the individual – the

"I" of discourse (Lejeune, 1988, pp. 4, 9). The nameless slave could also be an epitome of the poet's own sense of deprivation and restriction which she experienced under the austerity of the parental vigilance that also stimulated her literary talent. In the poem, the missing 'proper name' (woman's, lover's, babe's, aggressor's) stands behind the first-person narratorial discourse (p. 11). The gradual enfeeblement (through deaths caused and described) of human physical presences is counterbalanced by the augmentation of the speaker's desire to name the departed metonymically, with a special focus on voice, eyes, and face. Officially illiterate and all too impulsive, the black woman's narrative of her plight is an intelligently terse command over the "I" which calls for others: 'O slaves, (…) end what I begun!' (l. 231). Her pardon for the white oppressors, and her, eyes seeking the divine, question her self-confidence. This is, and is not, the murderous black mother's own story of herself: Remove the others, and she would vanish. Each of the dead claims a space of their own: Autobiographical means also biographical.

'And yet God made me, they say'

Late eighteenth- and nineteenth-century English poetical self-narratives abound in specimens of the autobiographical impulse. They warn of frustrations in store for those willing to explore the dichotomies mother–infant and Self–Other. Two eloquent, if somewhat ostensibly remote from each other, cases beg mentioning. In Emily Brontë's poem from her Gondal saga *A Farewell to Alexandria* (1839), also known as *The Outcast Mother*, a mother intends to leave her babe unattended, in a forest, in the snow, hoping that it would not die (Brontë, 1992, pp. 106-107, 258). The mourning mother is A.G.A., Gondal's Queen. Aware of her own dark nature, she is about to perform a perversely cautionary, self-authorizing act. The tone of voice of this self-exposing mother, whose 'breath would pause' and 'eyes would melt', may be way softer than the voice of the black woman slave in Elizabeth Barrett Browning's poem, yet her decision could be seen as no less lethal for her babe. Recalling mild July weather, sylvan music and peace, she departs: 'Farewell unblessed, unfriended child, / I cannot bear to watch thee die' (ll. 11, 35–36). In *The Negro's Complaint* (1788), William Cowper omits motherhood from direct mentioning for the sake of revealing descent through an expansive equation between cultural opposites, promoting originary authentication between body and mind: 'though slave they have enrolled me, / Minds are never to be sold / … affection / dwells in white and black the same' (ll. 7–8, 15–16, Cowper, 1860, pp. 365–366).

Poems of self-denial, which often narrate also of the dangers impending over the life of an Other, or those displaying an openly abolitionist element, could be inscribed into a more general debate on the matter of namelessness and repressed identity. They emblematize the Victorian era as the time of women seeking special recognition through 'metaphors of slavery' (Moers, 1976, p. 16). A fairly recent study of *The Runaway Slave* has noted the immediacy of the infanticidal experience the poem conveys: It 'is written so passionately that it exceeds the margins of fiction and begins to seem like biography', twining together slavery, madness, and murder (as well as, most likely, Elizabeth's rebellion against her father, and her fears of motherlessness), fending off extreme judgementalism (Schaub, 2011, pp. 558-559, 561). As Julia Watson has observed perspicaciously, because life-writing is backed by 'authorized traditions of representing … in Western culture' and 'patronymic privilege', women's autobiographical impulses to monumentalize selfhood could be seen 'in the light of alterity and dialogue', as a 'possibility of breaking into speech about … silence' – through various forms of cultural and genre 'métissage' seeking to transform the reader-witness (Watson, 1993, pp. 58, 61, 71, 73). Transformative narratives, all the same, fail to compensate for the loss of an infant's life. They offer no ultimate remedy for a very young individual's right of 'expression of human freedom', which gets savagely snatched away based on a simple quantitative consideration: The sheer insufficiency, the innocent beginning, the lack of time to enjoy life that the infant's demise means (Kohl, 1978, pp. 207, 210, 215).

The problem of infanticide as the perpetrator's loss of identity may find a place in a larger, compound discussion on illegitimacy of birth, surveillance over the individual, osmosis between victim and violator, marriage-law restrictions, punitive societal customs, ignorance about the true value of a child's life, and awareness about active versus passive suffering at the prospect of death. As Anne-Marie Kilday has written, in the period 17th – 19th centuries, in Britain, parasitical or outlawed by birth newborns faced the threat of extermination which sprung from the threat of the excommunication of the wronged woman, who, if poor (rather than well-off and literate), was to hide after transgressing (not always unwillingly) and face a life of denial (Kilday, 2013, pp. 51, 53, 55, 58-59). The secrecy enshrouding illegitimate births 'added weight to the belief that new-born child murder was … a pre-meditated and deeply deviant crime, … render[ing] infanticide a capital offence in the seventeenth and eighteenth centuries' (p. 61).

Woman's 'abhorrence of bloodshed' made asphyxia a common way in lethal imposition of power (Kilday, 2005, pp. 174-175, 182, 184). In *The Runaway Slave*, no details are provided about the woman's living in secrecy, or about her expecting, but the newborn is defined condescendingly: 'an amulet that hung too slack' upon her breast (ll. 107-108).

Annie Cossins' eye-opening investigation of female criminality expounds on the beastliness of Victorian society: Woman was a deeply sexed, deviant thing, the female body 'marking the boundaries of morality and immorality' – an essentialism paired with religious distrust for woman as a greater (than man) sinner (Cossins, 2015, pp. 57, 65, 156). In Elizabeth's poem the mother seems riotously conscious of her deed, seeking no assistance from a baby-farmer or any other Malthusian:

…
I covered his face in close and tight:
And he **moaned and struggled**, **as well might be**,
For the white child wanted his liberty –
Ha, ha! he wanted his master-right.

He moaned and beat with his head and feet,
His little feet that never grew –
He struck them out, as it was meet,
Against my heart to break it through.
I might have sung and made him mild –
But I dared not sing to the white-faced child
The only song I knew.

I pulled the kerchief very close:
He could not see the sun, I swear,
More, then, alive, than now he does
From between the roots of the mango . . . where?
. . . I know where. Close! a child and mother
Do wrong to look at one another,
When one is black and one is fair.
…
And he **moaned** and **trembled** from foot to head,
He **shivered** from head to foot;
Till, *after a time*, **he lay** instead
Too suddenly still and mute.
I felt beside, a stiffening cold
I dared to lift up just a fold, ..
As in lifting a leaf of the mango-fruit.

(ll. 122-140, 148-154, emphasis added)

In its own way, the above fragment suggests curiosity about the act of murder, as well as seriality in perhaps witnessing similar deeds ('as well might be', l. 124). And yet it prompts reflections about deprivation and denial, rather than unassailable victory or true self-content. While the duration of this act is dubitable ('after a time', l. 150), the relativism about permitted and efficient – sparing an innocent from further suffering, or depriving an innocent from a chance of enjoyment of life – pales before the terror of a growing awareness that the speaker is seized with. The mother obeys the bewitching voice of the dead child coming from its sylvan grave: The song reduplicates her own maiden song iterative of her lover's name ('It was only a name – a name.', l. 84), which remains unknown till the end but comes to question her own certitude of judgement and justice (ll. 183-196). The infant's death is the mother's death, despite the feigned advantage surfacing in the pardon the black slave grants her violators finally.

'In the death-dark where we may kiss and agree'

By the time "*The Runaway Slave*" was republished (in the Chapman & Hall 1856 two-volume edition) Elizabeth Barrett Browning had produced a number of other poems of ontological and autobiographical merit on suffering, infant mortality, and duty to the Other. Her growing belief was that imposed misery deprived the perpetrator of that vital exteriority which guaranteed the authenticity of the Self.

Joshua King's percipient placement of the poet amidst radically-minded upper-class Congregationalist mid-century women has disclosed the poem's 'ecumenical vision, commitment to integrity, call for immediate action', as well as the Pilgrim Fathers' 'failure in America', which could be seen to render infanticide 'a parody of Christ's sacrifice' (King, 2017, pp. 3, 8, 21). Some earlier biographical scholarship has been more modest in praising the poet for such a 'horrifying story': Albeit aimed at 'redress[ing] a great social wrong', the poem seemed 'too blunt and shocking to have any enduring artistic worth' (Taplin, 1957, pp. 113, 194). Dorothy Mermin has noted the black woman's radical provocation to her white pursuers to look at her, 'displaying herself … [as] their victim and a murderer whose unsated rage mirrors their own murderousness' (Mermin, 1989, pp. 156-158). Angela Leighton has argued that the enslaved woman's terrible deed could be read as an instance of 'break[ing] with two sacred myths of English Victorian society: The myths of motherhood and fatherhood', the man's name, nonetheless, having a

procreative significance in inspiring speech and in 'steady[ing] the woman's words' (Leighton, 1986, pp. 40, 43). The child in the poem is known to be male but has no name – neither has the woman's black lover (whose name she is known to be singing to herself), nor do any of her white masters, or any of the pilgrim fathers.

Now more intimately (in first-person narratives), now somewhat more remotely (in third-person narratives), Elizabeth Barrett Browning declared herself against solipsism. Other poems (some unpublished in her lifetime), in which face, voice, and identity were involved in the complexity of self-defining based on the hermeneutic relationship between mother and child, surviving and dead, and One and Other, might include: The juvenile Petrarchan sonnet *Sent to Mama*, also known as *'Twas dark – the tempest blew aloud* (1814) (Donaldson et al., 2010, vol. 5, p. 167), in which a poor mother, having lost her babes to the chill of winter and misery, drowned herself; *Isobel's Child* (1837) (Donaldson et al., 2010, vol. 1, pp. 267-288) – a mother's lament over the death of her sick child, whose suffering she had witnessed; *The Virgin Mary to the Child Jesus* (1838) – a mother's address to her self-sacrificial child who set a criterion of being she would hardly be able to meet; *A Child's Grave at Florence* (1849) (Donaldson et al., vol. 2, pp. 387-394) – a poetical response to the grief of another family over the death of their infant daughter; *Hiram Powers' Greek Slave* (1850) – a description of a nameless chained naked Greek woman, whose physical perfection and 'divine face' (l. 12) concealed her spiritual anguish and confounded the viewer's gaze (Donaldson et al., 2010, vol. 2, pp. 147-150).

Compared to the poems listed above, *The Runaway Slave* offers discrete opportunities for an intersection of ethics and aesthetics; the contrast in colour (related to conceptual oppositions to do with age, sex, and social status) presents food for thought and urges one perceive the relativism of self-sufficiency in the impulsively rendered female slave's story of her own life. The dichotomic unity between the two colours (white and black, and nuances of light and dark) underpins the poet's hermeneutic-phenomenological attitude to the matter of self-knowability, which provokes a peculiar perception of time and space. The slave's skin and the night share an impenetrability, impassability, and dingy ghostliness (ll. 5, 19, 28, 30, 35-36, 39, 57, 92, 106, 114, 169, 202, 218, 251), which is formulated through the self-defining laconic 'I am black!' (reiterated at least seven times, with variations of the grammatical person between 'I' and 'We').

Blackness butts into the light of day, the mobility of water, the shining stars, and alienating angelic whiteness (ll. 7, 11, 34-35, 48-49, 89-90, 115-116, 121, 162, 167, 169, 199, 250). This contrast does not bring together protectively, but rends asunder antagonistically. Yet none of these contrastive entities of presence could exist independently – each contains a portion of its alternative: The pilgrim-souls emerge from 'the land of the spirits pale as dew' (l. 11); God offers 'sunshine and … frost' (l. 49), sitting 'coldly … behind the sun' (l. 89) which conveys not warmth but deathly chill (l. 168); white men are not 'able to make Christs again' (l. 242). Though at some point the woman specifies that the events she is describing happened 'a month ago' (l. 168), the momentous part of the story is the act of murder, which makes of the whole an intensely yet conscientiously shared self-extinguishing protracted description of the pain and deprivation that the infant is put through (stanzas XVIII–XXII).

From the point of view of ethics, the depraved black woman is in a Levinasian situation of 'existing without existents', i.e. 'without a starting point', for each subject – the mother, as well as the babe – is 'a subject … [as] already a beginning'; the murder of the infant is an event which questions 'the eternal subject' (Levinas, 1987, p. 49) and grace that God is, and the subject that the survivor strives to be. The woman's suffering becomes the perceiver's suffering aggravated by the impossibility of detachment from her life-narrative which 'is an absence of all refuge' (Levinas, 1987, p. 69). When the woman strangles her babe, she is left with no Face to face, i.e. with no time to accomplish, for 'the condition of time lies in the relationship between humans' as history (Levinas, 1987, p. 79). From the point of view of structure, the woman's predicament is an illustration of the temporal act of understanding, which underlies also autobiography. Claiming authorship over the act of infanticide, she claims authorship over herself, and so emerges as 'the subject of her own understanding', which she insists upon yet wishes to 'escape' because of 'the coercion' that 'specularity' (i.e. cognizing and seeing, also being cognized and seen) presupposes as a focus on 'the proper name, on memory, on birth, eros, and death' (de Man 1979, pp. 922). The case is further complicated: Should one wish to perceive the wretched woman's story as a terse expression of her autobiographical impulse (her story is all we know about her), one would have to meet the namelessness of the protagonist, who is also the narrator – the murderous mother herself, but behind whose identity there stands that of the author. The child has no proper name – neither

does his mother: they mirror each other, constituting a common generic type, or class, of anonymity. To add a biting remark: Take *The Runaway Slave* away from Elizabeth Barrett Browning, and she would not be the Elizabeth Barrett Browning – a speaker of those needing a voice, face, and name of their own, and lingering between obedience and riot. Then, who is really the dedicatee of this bizarre tale of woe, which is at once a dramatic monologue, a ballad, and an ode? Who is being eulogized: The child, the mother, or the poet herself?

A strident nineteenth-century female voice, Elizabeth was threatened by no dearth of immediate critical attention. Some reviewers thought she had 'erred in her poem "The Runaway Slave", in so far as it [was] directed against [the] American Union' (BC 17, 2010, pp. 288-290, E510201A, reprint of an anonymous review of Elizabeth's 1850 *Poems*, published in *The Literary World*, 1 Feb 1851, pp. 85-86). Others admired the poet's 'trenchant denunciation of American slavery', her compassion for 'the wrongs of the captive negro-women' (BC 17, 2010, pp. 290-293, E510300B, reprint of an anonymous review of Elizabeth's 1850 *Poems*, published in *The Eclectic Review*, March 1851, pp. 295-303), her 'outburst of passionate remonstrance' (BC 23, 2016, pp. 269-273, E560700A., reprint of an anonymous review of Elizabeth's 1850 *Poems* and *Casa Guidi Windows*, published in *The New Monthly Magazine*, July 1856, pp. 369-378), and her receptivity and inability 'to become an unpersonal spectator of human woes' (BC 30, 2024, p. 367, E620300B., reprint of Edwin Paxton Hood's review of Elizabeth's 1862 *Poems* (EBB), 5th ed., Chapman & Hall, published in *The Eclectic Review*, March 1862, pp. 182-212).

'… to look at one another'

Although nowhere else in Elizabeth Barrett Browning's other poems on motherhood and infant death may the motif of infanticide as self-de-facement be certifiable to the extent that it is in *The Runaway Slave*, there could be strongly sensed an adult's disconcerting attention to the endangered integrity of body and soul, jeopardized infancy, defenselessness, and the mutual dependence between survivor and dead, which asks the scholar to revisit the range of responsibilities and power an adult has over the life of the young. In the aforementioned sonnet 'Sent to Mama on 1st May 1814' the infant babies 'shut … poor little eyes' and 'die, contended in their mother's arms' (ll. 6–7), but the alarming description of the mother's grief aims at showcasing the loss of the health-

sustaining distance and ontic blessing that the Levinasian Other's look and Face contain. The mother is left to the solitude of her own vacant gaze and to a reality of absence and meaninglessness where gone is 'the refractory to all light', relationship with 'l'Autre' – she is alienated from life and bereft of the much needed and productive viable link with her own self through the life-sustaining exteriority that the Other (her babes) could give her: Their Death steals her own singularity (Levinas, 1987, pp. 74-75). With no infanticide committed, the survivor's guilt creates a sense of deprivation, of self-erasure. *The Runaway Slave* is a wider project: In it, the 'rape victim' participates in 'a reparative meaning and significance borrowed from a Christian framework' – she pardons the white pilgrims, leaving her oppressors curse-free 'in the name of her own child, who becomes a purposefully ambiguous type of the Christ child' (Miller, 2014, p. 643).

The ethical value of the infant's Face may take some time to detect in *Isobel's Child* (1837, Donaldson et al., 2010, vol. 1, pp. 267-288), but it is no less indicative of the mother's autobiographical impulse. The child enters a passionate conversation with his mother, proves impressively eloquent and mature, despite its young age, begging her to grant it permission to fly to Heaven. The 'innocent faces' of babies like her own might not at all be 'meant for [her]' (l. 240-241). The self-estranging effect the child's face has on the mother initially is a hidden lesson in divine wisdom: The child, and not the mother, is the philosopher (l. 269-288). The babe's plea 'Mother, mother, let me go / Toward the Face that looked so,' (ll. 444-445) is a craving for harmony, completion, and aesthetic perfection (Heaven beckons with 'a little harp', ll. 484-485). Another example of a mother's failure to comprehend the wisdom that her child emanates is *The Virgin Mary to the Child Jesus* (1838, Donaldson et al., 2010, vol. 1, pp. 477-487). Word and gaze are points of mutual identification of mother and child: 'So, seeing my corruption, can I see / The Incorruptible now born of me'; 'What is my word?'; 'Awful is this watching place, / Awful what I see from hence –… / A child, without the heart for play; / Ay, a Creator, …' (ll. 106-107, 127, 164-169). Elizabeth Barrett Browning's poems of motherhood are poems of mourning which, following Levinas' existential-phenomenological views, could be taken to interrogate the mother, urging her to 'ask [herself] whether [her] own being is justified' and whether she may not be usurping 'someone else's place' – the place of the one whose voice, even when dialogue is assumed, rather than really heard, is 'an order … to answer for the life of the other person' (Levinas, 1999, pp. 28, 103).

Denied a chance to survive – because of a physical malady, death, untimely (otherworldly) wisdom, poverty, or living in slavery – wretched infants find a safe haven in Elizbeth Barrett Browning's works. They belittle the adult even when no trauma or pain is caused by an older one to a younger one. From a broader cultural perspective, such a privileged status of the child may be a token of regret over brevity of life, a kind of memento-mori sign to the adult who is unconditionally responsible for the wellbeing of an infant. The death of an innocent young individual throws the mother's presence into relief, which could be seen to create, to agree with Philippe Ariès, a kind of 'iconography of childhood' whereby the child is assigned 'a man's personality' and 'a place of honor' in an ontology which gravitates toward 'a probable loss' (Ariès, 1962, pp. 32, 35, 39, 47). Fear for the life of the Other who might get hurt, or fear exhibiting the survivor's responsibility about the departed, leads the viewer to self-identification through self-denial. The impulse of narration is of this ilk in *A Child's Grave at Florence* (1849) (Donaldson et al., 2010, vol. 2, pp. 387-394). The death of infant Lily is documented in a portrait she would become 'in Old Correggio's fashion' (l. 130). It is the very painting that could reactivate the poet's grief at the tomb of such a bereft of a promise life (ll. 9-12). The eulogy conceals the peril of anonymization of two lives: As a re-visitable monument of sorrow, the work of art typifies and thus delimits the departed child and the mourner, conjoining them in the relational entity viewer–viewed. In *The Cry of the Children* (1843) (Donaldson et al., 2010, vol. 2, pp. 431-436), the working children's 'pale and sunken faces', looking at death, make the adult's gaze complicit in their misery (ll. 25-39, 159-160). In *A Song for the Ragged Schools* (composed 1854, published 1862) (Donaldson et al., 2010, vol. 5, pp. 30-35), the ragged children, 'hungry-eyed', huddled on doorsteps, wicked, peak-chinned infant London vagrants, with 'old foreheads,' interrogate adults (ll. 44-70, 120-128). In *Aurora Leigh*, adult Aurora's autobiographical impulse gets catalyzed by her finding Marian (sold, when a child, by her own mother to a beastly-eyed man) and Marian's own bastardized child: An encounter that blurs Aurora's perception about decorum and stirs her peace of mind. To this sobering effect contributes the power of the look (Marian's own, as well as the look one is allowed through Marian's room's window, whose 'curtainless' poverty steals away one's chances of privacy and guiltlessness, Donaldson et al., 2010, vol. 3, Book IV, ll. 99-101, 150; Book VI, ll. 226-240, 305-451, 552-571).

The concreteness, materiality, and the torturing plea for help which wretched young individuals (ostensibly just generalized and remotely mourned, some dead, others about to die) confront the poet with provide her also a face and an identity of her own – that of a survivor.

An Epistemological Impasse, or Some Final Queries

The first half of the nineteenth century in English poetry seems to have been haunted by self-conscious descriptions of guilty adults suffering the wretchedness of infants, loss of freedom, and an insurmountable sense of exile. Exploring manifestations of adult self-de-facement through afflictions caused to children requires a larger terrain, but perhaps a handful of synonymous daunting vignettes could prompt self-reflection. For instance, what is the true nature of the lonely, husbandless mother's babe whose 'wicked looks' demand response in Wordsworth's *Her Eyes Are Wild* (1798) (Wordsworth, 1994, pp. 144-145, ll. 47-48, 86-90)? Or, has Martha Ray, the mad mother in Wordsworth's *The Thorn* (1798), indeed hanged her babe, or drowned it, and what is the countenance of its assumed resting place, the thorn, telling her (pp. 197-200, ll. 199-220)? Is there no possibility of avoiding the deathly water cataract, against which an abandoned by her husband mother rows a boat and perishes – is there no other chance to rescue her female babe and spare it a 'woman's weary lot' in Felicia Hemans' *Indian Woman's Death-Song* (1826) (Hemans, 2000, pp. 377-379, ll. 36, 38-42)? One wonders whether in Epistle II of Lucy Aikin's poetical *Epistles on Women, Exemplifying Their Character and Condition in Various Ages and Nations* (1810), the Indian woman might have made a decision other than to murder her own babe to save it from 'toil, and pain, and strife' ('Die, little wretch; die once and be at peace!', Feldman, 2000, pp. 6-15, ll. 9-12, 29-35). This self-epitaphic narrative seeks to explain the roots of cruelty through 'want'. Charlotte Smith's pro-human *The Emigrants* (1793) (Curran, 1993, pp. 132-163) contextualizes the escape from France and fleeing to England of opponents to radicalism during the French Revolution. While it urges one to recognize the lawless displacement of man in general, in *Book II* one stumbles over a solitary 'wretched mother' who hides in a thicket but fails to protect her babe from the cannon, whereupon they both die (ll. 239-291). The demise of mother and child torments the lyrical speaker – it is a Levinasian imagined infliction of harm on the Face, which the survivor (preserving in her first-person narrative the emigrants' own woeful recollections) proves unable to prevent.

The confusing status of woman as mother in *The Runaway Slave* (and in other poems which identify guilt and loss as innermost ingredients in an adult's self-perception) could only partially be resolved through the 'idealized realm of unity in death' that 'suffering under slavery' may be granted (Brophy, 1998, pp. 275-276, 281). A Romantic, Promethean, 'extreme challenge to the reigning ethos of [the poet's] day as well as the racist social and political power structures that promulgated it' (Harrison, 2020, p. 62), infanticide remains a Gordian knot against Elizabeth's humanist orientation. The murderous mother wishes to confront her own life as a slave, but killing her own half-white child (promised excommunication and possibly starvation anyway), she deprives herself of a chance to de-anonymize, through the next generation, her own potential. Mother and child are – prior to the murder, at the time of the murder, and after it – an entity. The murder is born out of an enslaved woman's fierce desire to be granted a chance for self-liberation by way of redefining warped values and moral scales. Her horrible deed promotes the victim to a higher (than her own) rank of ethical worth, leaving the survivor terrified at the infant sufferer's wordless (though not without resistance) departure from the world of the living. The runaway slave embraces yet rebuffs her own babe. Foreign to his divine whiteness (ll. 117-119, 177-181), she indicates the ominous potency of facial contact: It solidifies yet undermines her identity in her struggle to avoid being seen. The death of the child, whose face the mother has unsuccessfully attempted to forget, is her own death: When not seen by him, she merely hangs 'as a gourd hangs in the sun' (l. 226) – full of sense yet no one to give it to. The child is referred to as 'my little body' (l. 176), which could also be a reference to the mother's own body – diminished through suffering itself, and, prosopopoeically, granting the murdered infant a materiality and substantiality of his own.

In a number of other poems, the accusatory, abject, inconveniencing look of children works as an overwhelming call for response and a source of knowledge-building through inspiring a sense of obligation which limns the adult's idea of time and space in terms of surviving an innocent young Other[3]. Haunting images of departed and re-

[3] An adult's self-identification through a suffering young individual to the effect of a prosopopoeic mobilization of the imagined for the actual, the unheard for the audible, the dead for the living, the victim for the perpetrator, the helpless for the empowered, invites a generous range of works by Elizabeth between her Juvenilia and her mature poems, amongst which, for instance, her cautionary prose-fiction tales in the period 1814 – 1818 (*Sebastian or the Lost Child; The Way to Humble Pride; Disobedience; Julia or Virtue. A Novel; Charles de Grandville*), *A Fragment of an Essay on Woman* (1822), *A Child Asleep* (1839),

imagined young ones displace the facticity of adult viewers, stealing away the chance for them to acquire faces of their own. And yet a mother's loss could be related to a 'desire for individuation' in a world where 'women cannot protect their children, and maternity does not protect women' (Montwieler, 2019, pp. 79, 84).

The investigation of infanticide as self-de-facement in Elizabeth Barrett Browning's *The Runaway Slave at Pilgrim's Point* could be extended further so as to expose children's suffering, social polarity, and the omen of the anonymization of woman through coerced motherhood over a wide spectrum of reflective poetical works. A ragged selection of lines by poets willing to provide a voice, face, and place to unfortunate young ones seeking an identity of their own and (indirectly) of their wretched parents' own, could emboss the theme in hand. Enter Thomas Hood's 'noisy children', disturbing one's peaceful reading time in a 'world too full', but short of undertakers, a world made too tight by 'the large small family of charity, / Brown, black, or carrotty, / Walk[ing] in their dusty parish shoes, / In too, too many two-and-twos' (*Ode to Mr. Malthus* (1832), Clubbe, 1970, pp. 274-279, ll. 3, 15-21, 30, 91-94). There sounds Anna Laetitia Barbauld's second-person address to Agatha, which displays the allegorical 'Baby-house to lodge the dead' – a tiny sumptuous distilled image of Versailles, contrasting the 'sordid hands' of peasants and their toyless children (*The Baby-House,* (1811), ll. 1-10, 19-30, 37-40, 46-50, Feldman, 2000, pp. 82-83). There emerge William Blake's martyred urchins from *Songs of Innocence* (1789): Some born 'in the southern wild', 'black, but O! [their] … soul is white' (*The Little Black Boy*, ll. 1-2, 23, Blake, 1970, p. 10), others turning a deathly white colour, leaving their bags behind and soaring up to Heaven (*The Chimney Sweeper*, ll. 1-2, 12, 17-20, Blake, 1970, pp. 11-12).

The misery, defenselessness, and nobodiness of the pauper child reduce the adult to speechlessness which de-faces poet and reader alike.

The Princess Marie (1842), '*O Pardon Dear Lady'* (1842), '*Rock Me Softly – Softly Mother'* (1842), *The Mourning Mother* (1844), *A Child's Thought of God* (1844 – 1846), a partial translation of the Latin hymn *Stabat Mater* (1852), and *Only a Curl* (1861). Overall, de-faced infancy proved a pivot in the evolution of the poet's faith in the supremacy of the Other, which could be approached through what Emmanuel Levinas named 'the asymmetry of the I – You relation': 'The ethical disturbance' the Other produced in the Self, the Self being 'never discharged', but held 'hostage', 'obligated without guilt' 'to the encounter with the other … presupposed in all language' (Levinas, 1999, pp. 97, 101, 105-106).

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CHILDREN AS COMMODITIES IN THE AMERICAN SUBURBAN HOME: JOYCE CAROL OATES'S ADAPTATION OF THE RAMSEY CASE IN "*MY SISTER, MY LOVE*"

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Abstract

Joyce Carol Oates's *My Sister, My Love* is a fictional memoir inspired by the unsolved murder of JonBenét Ramsey. The novel, told from the perspective of the victim's brother, satirizes the exploitation of children in beauty pageants and the superficiality of suburban life. Through a counter-memory narrative, Oates sheds light on the hidden abuse endured by children, revealing the dark underbelly of a seemingly perfect family. The novel serves as a powerful critique of societal pressures and the devastating consequences for young victims.

Keywords: Joyce Carol Oates, children exploitation, Ramsey Case, American suburbs

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There is probably no worse and irredeemable form of child abuse than murder. That is perhaps what everyone who was exposed to the Ramsey case thought on the first days after December 26th, 1997. On that date, the body of six-year-old beauty pageant queen JonBenét Ramsey was found in the cellar of her home in Boulder, Colorado. She was wrapped in a blanket, her hands were tied, and her mouth was covered with adhesive tape. The subsequent autopsy revealed a fractured skull and vaginal lacerations. The local and inexperienced police was put in charge of the investigation, which for a long time focused on JonBenét's parents, the wealthy John and Patsy, who started a private investigation and defended their innocence on many TV interviews.

There are multiple theories on the case, the majority of which were made up by the media that invaded Boulder and devoted several cover-stories to the girl. The mother remained the main suspect for years, while another credited theory sees Burke, nine years old at the time, killing his sister and forcing his parents to stage a fake abduction to protect him.

What many commentators did not consider was that the murder might have been only the final act of a previous and continued pattern of abuse towards JonBenét. Indeed, some documents dating back to 1999 and unsealed in 2010 revealed that she had been mistreated by her parents long before her death. Anyhow, after all these years, the Ramsey case is still a cold one, with many theories and an entire Nation obsessed by a murder where "the victim was so young, blond, and beautiful, the parents rich and prominent and intelligent, the neighborhood fashionable and safe, the community secure and self-satisfied […]" (Douglas & Olshaker, 2000, p. 269). The image of the girl performing on stage, dressed and made-up as an adult, has become a symbol and an icon not only of a young life that was broken in mysterious circumstances, but also of the exploitation of children and their innocence and beauty. As claimed by Mark Olshaker and John Douglas, "in a bizarre and perverse mockery of our cult of celebrity, in death, JonBenét became America's greatest cover girl" (p. 269).

In 2008, Joyce Carol Oates published *My Sister, My Love,* a novel inspired by the tragic event. When interviewed about the reasons that compelled her to write about it, she declared that "[her] primary motive in choosing this case [was] that it remain[ed] unsolved; also, it involve[d] the exploitation of a young child by her mother in a way that seem[ed] to [her] emblematic of such exploitation generally in our time" (Oates, 2008,

p.5). Writing about JonBenét allowed Oates to reflect upon the exploitation made by a mother, which was a generalized one and typical of the era and the specific place where the Ramsey family lived—a wealthy suburb. The author gave this story a universal and emblematic character, also counting on the young age of the victim. Many years before the publication of the book she had declared: "When you're a young person you just don't have any power, especially when a person in authority does something to you" (Johnson, 1998, 54). This vulnerability is what the writer wanted to stress in her novel, shedding light on a kind of abuse that is often underrated, hidden, or mistaken for excessive preoccupation for the future of one's children. The aim of this article is to analyze the strategies deployed by Oates to adapt the Ramsey case in her novel and to compare them with the actual murder, along with the wider and more general habit of commodifying children in the context of the American suburbs.

Adapting the Case

Confronted about the evident similarities between the Ramsey case and *My Sister, My Love,* Oates admitted to having been inspired by it, but she also stated, in the introduction to the novel, that it was "a work of the imagination solely" which laid no claim "to representing actual persons, places, or historical events" (Oates, 2008, p. 3). The operation accomplished by the author is to disguise the facts, changing the names and the setting of the story, providing her idea of how things might have developed. The voice she uses is not the young victim's (whose name in the novel is Bliss), nor her parents'. The memoir, which recounts the facts ten years later, is written by the murdered girl's brother, Skyler.

The names of the main characters bear a certain resemblance with the original ones. The last name of the victim is indeed "Rampike", which assonates with "Ramsey", and her mother's is "Betsey", which bears some resemblance with "Patsy". Her father's name is Bruce, but everybody calls him Bix.

Oates revises also the main activity of the girl, because she does not compete in beauty contests, but she is a professional skater. Places and dates are also different from the original ones, as the fictional murder unravels in the night between January 28th and 29th, 1997 (and not between December 25th and 26th, 1996). The novel is not set in the town of Boulder, but in the suburb of Fair Hills, New Jersey.

The memoir that Skyler writes for the tenth anniversary of his sister's death states its aims from the very first page. The narrator defines it as "a 'unique personal document'—not a mere memoir but (maybe) a confession" (p. 4). The repetition of the events of ten years earlier aims at recounting the life of Bliss Rampike, remembering her, and trying to understand what really happened in the night she died. That is why Skyler explains immediately that he will not follow a linear and chronological path, but "a pathway of free association" (p. 4). The memoir lacks, indeed, a linear logic and the author's awareness of how it is going to end. Readers are equally unaware of the author and the motives of Bliss Rampike's murderer. As for the memoir genre, Oates's choice might be connected to the tragedy that inspired it. The horror elicited by JonBénet Ramsey's murder implies the necessity to create a narration that recounts her story as a victim, since memory constitutes, in the Ricoeurian view, "the ultimate ethical motivation for the history of victims" (Ricoeur, 1985, p. 187). The account has also the aim of understanding the reasons behind certain events that strike for their senselessness and cruelty, and only fiction "gives eyes to the horrified narrator" (p. 188). Rather than writing a traditional novel on the case, Oates decided to produce the parody of a memoir.

The memoir, which is "a factual account of the author's life" (Yagoda, 2009, p. 1), differs from the autobiography because it does not recount a whole life, but only a part of it related to some particular event (p. 1). Autobiographies focus on the author, while memoirs turn it into a character, "essentially negative, or at least neutral" (p. 2). The narrator in *My Sister, My Love* fits in this definition. Of his nineteen years he recounts only those he spent with his murdered sister and those following her death. Many chapters are narrated in the third person, as if the author wanted to be equaled to a neutral and sometimes negative character. Skyler is obsessed with the idea that he could be, although he does not remember it, the person who killed his sister out of envy. Since the girl had started her career as a skater, Skyler had been neglected, also due to a physical defect he had developed after a gym accident that had made him permanently lame. The trauma of Bliss's death, and the fear of being its author, add up to a set of mental disorders that make him a difficult teenager, always in therapy and forced to attend special schools.

Skyler is not a positive character, he has nothing exemplar, and perhaps for this reason he is the ideal author of a memoir. The genre spread in America in the 1960s, and at the time only "eminences, the pious, and people with exciting, unusual, or somehow

stirring stories" wrote memoirs (Yagoda, 2009, p. 67). From the Nineties onward, the object of memoirs were stories of "dysfunction, abuse, poverty, addiction, mental illness and/or bodily ruin" and "the more unsettling, shocking, or horrifying the truth, it sometimes seemed, the better" (p. 228). The story recounted in this novel features all these elements, except for poverty, since the Rampikes are the typical upper-middle class family living in a rich suburb. The dysfunctional element regards essentially the Rampike family dynamics, where children are used to attain popularity by their parents. The abuse is perpetrated by Betsey towards her daughter, forcing her to undergo an exhausting training, medical appointments involving the prescription of drugs, and most of all killing her childhood when she makes her up and dresses her like an adult. The dependency is that of Skyler, who was sedated since the morning the lifeless body of Bliss was discovered in the basement, and for many years afterwards, until he entered a clinic to start his rehab, and he quit taking drugs. The mental illness is Skyler's, because he gets diagnosed with a new disorder every time he has a new psychiatrist, and he is considered at high risk of suicide. Finally, the bodily ruin is that of the boy, who must hide the fact that he limps, and after his sister's death he loses all his red hair, to see it grow back in an unsettling zinc colour (Oates, 2008, p. 20).

The fake memoir written by Oates can also be associated to what Yagoda defines as "therapeutic culture": a general tendency where "it's not only acceptable but a good thing to lie on a couch in public, as it were, and disgorge personal stories […]" (Yagoda, 2009, p. 238). Yet, even though the novel is filled with scenes involving a psychiatrist, paradoxically it is not one of them who gives Skyler the idea of writing a memoir as a cathartic act. It is a pastor, Bob, who exhorts the boy to tell his story: "Pastor Bob said: You must unburden your soul, son. You must tell your story. Told Pastor Bob hell I'm dyslexic. Or something" (Oates, 2008, p. 27). The man, whom Skyler meets during his rehab, becomes at the end of the novel the only reliable figure for the boy, and the only positive character in the novel. In this brief dialogue it is possible to notice how initially Pastor Bob is far from being the only trustworthy figure for the narrator. The dialogue is built on the contrast and the distance between Skyler and the pastor. The language used by Bob is solemn and it displays clear religious references, so that the pastor is defined later as "a religious lunatic" (p. 28). Skyler's answer, on the contrary, contains an ironic shade, as he counterposes to the ethereal language of the pastor a much more concrete problem: his dyslexia. This is one of the elements that make *My Sister, My Love* a parody

of a real memoir. Even if it deals with quite serious subjects, it provides what Bakhtin defines as the essential element both of parody and satire: the comic double (Bakhtin, 1981, p. 58). The ironic element of the story does not regard the murder itself, which remains a tragic event, but everything that revolves around Skyler's parents. They are the real parodic element of the novel: Bix and Betsey, rich and ignorant, always engaged in the quest for a social validation with every possible means, including the exploitation of their children. The main target of Oates's satiric hatred is Betsey, an extremized version of Patsy Ramsey, who died of ovarian cancer in 2006. The author's satire does not have ethical boundaries, since she makes irony also of the death of the woman, an event that occupies the final part of the memoir and which determines the solution of the mystery related to Bliss's death. The press divulges the news that Betsey died of cancer of the cervix, but a conversation between Bix and Skyler on the day of her funeral reveals that she died for complications of a liposuction surgery (Oates, 2008, pp. 531-532). Betsey decided to undergo a liposuction because, after the death of Bliss, she had become a public figure, which had always been her greatest wish. The woman started to be hosted more and more on TV programs, wrote memoirs on how to overcome grief through faith and founded a brand, "Heaven Scent", which produced gadgets, make up for girls, and various objects inspired by Bliss, including a doll with her features.

Betsey's TV apparitions fit in the memoir logic. As claimed by Yagoda, "[i]n the publishing environment of the time, promotion was seen as the key to commercial success; the key to promotion was getting on talk shows; and the best way to get on a talk show was with a dramatic or unusual personal story" (2009, p. 238). Oates recreates the typical pietistic atmosphere of such programs, where Betsey can display several religious stereotypes and quotations that make her look exemplary and brave (Oates, 2008, p. 406). John and Patsy Ramsey's TV apparitions in various talk shows are the inspiration for Oates to write these pieces, because their words were always full of faith and innocence claims[1].

What characterizes this memoir even more than the satirical element is the voice of the author: a teenager. It is a voice that shapes the memoir because, among the genres

[1] See for instance the Hawaiian show *Connecting Point*, where the Ramseys were hosted in 2006. Questioned by pastor Wayne Cordeiro, Patsy obsessively spoke about religion and the strength she found in faith. In a section of the interview, she mentioned her son Burke, and Patsy claimed that "God ha[d] laid his arms on him".

produced by young people, biography and autobiography are the most significant ones, and through them, they can represent not only their selves, but also their frustrations and desires, like that of "knowledge in the face of knowledge denied" (Alexander & McMaster, 1976, pp. 152-154). Skyler tells his story because he does not know whether he has killed his sister or not. The event, as he remembers it, is filled with voids that do not allow him to reconstruct it following his memories, but only starting from what he has been told or what he has read in the tabloids. It is a knowledge denied for most of the novel, until a letter written by Betsey before her death allows him to acquire this knowledge.

Youth writing has some structural features that characterize it. Among these, there is the tendency to using the visual element, which turns out to be "the best and often only source of knowledge" (Alexander & McMaster, 2005, p. 53). Skyler's memoir displays this inclination that manifests itself not only through the abundance of descriptive details (he describes meticulously the costumes worn by Bliss during her competitions), but also through the frustration of someone who cannot provide a visual form of what he writes (Oates, 2008, p. 231).

Another feature of youth writing is the appropriation of the voices of the characters, "so beginning a gradual fragmentation of narrative authority" (Alexander & McMaster, 2005, p. 156). The narrating voice in this novel never changes, but the point of view shifts between the nine-year-old Skyler and his nineteen-year-old counterpart. Yet the narrator absorbs the voices and reports them, sometimes, with the same confusion of the time he had perceived them first, constructing with them entire paragraphs without comments that narrate certain episodes on his behalf.

Oates chose the memoir to write about the Ramsey case because it is a genre that deals with memory, so it allowed her not only to give a very specific voice to the one who remembers the events, but also to exploit the proverbial fallibility of memory to produce a narration that is characterized by confusion and stratification. Memory is unreliable, since "consciously or unconsciously, we manipulate our memories to include or omit certain aspects" (Shields, 2010, p. 57), a manipulation accomplished also by the narrator when he admits that: "[…] you, who are Skyler's readers, can know only what Skyler chooses to tell you. Though presumably I am the "author"- I, too, know only what Skyler can tell me" (Oates, 2008, p. 501). In this fragment, Skyler talks about himself in the third person (as in many other sections of the memoir) and he reveals all his unreliability as a

narrator, claiming that he is choosing exactly what to tell his readers. At the same time, he must rely on what the kid Skyler, and his memory, decide to tell him. It is a memory made even more unreliable after the years spent under the influence of medications. The scenes are reconstructed meticulously by the narrator who forces his memories and gives them a precise architecture that sometimes he must struggle to keep, revealing its artificial nature. It happens, for instance, in the paragraph "In the beginning", where Skyler reflects upon a conversation he had had with his mother when he was four years old, and she had vented about her marital frustrations. Skyler reports a great deal of their dialogue, and then observes: "Damn: I've forgotten to 'set the scene'" (p. 34). The comment, which is a metatextual note, reveals how the construction of the scenes is totally artificial and how memories can be manipulated and rearranged. For this reason, the memoir genre is not considered a reliable and objective account, but a genre "universally understood to offer subjective, impressionistic testimony. It doesn't pretend to offer the truth, just the author's truth" (Yagoda, 2009, p. 265).

The manipulation of memory is also the cornerstone of what George Lipsitz defines as "counter-memory": a way to remember or to forget that looks at the past to accomplish a revision of the existing stories, "supplying new perspectives about the past" (Lipsitz, 2001, p. 213). Skyler's perspective can be considered a counter-memory, a new version of the stories provided to him by his parents or the tabloids. A counter-memory, indeed, is not a refusal of history, "but a reconstruction of it" (Lipsitz, 2001, p. 277), what in fact Skyler does throughout the memoir hoping to understand whether he is his sister's murderer or not. The fundamental element of Lipsitz's counter-memory is that it seeks for hidden stories, those that were excluded from the dominant narratives. Skyler is naturally the neglected person in his family. Obscured by the beauty and the fame of Bliss, he is always excluded by his parents, and once his sister is dead, he is constantly sedated. Before the murder, he overhears his father confessing that he cannot leave his wife, even if he would like to, because she is obsessed with "our daughter" (Oates, 2008, p. 279). In the following two pages, Skyler writes only the titles of two paragraphs left completely blank. The title of the first is "…NOT A WORD OF OUR SON*". The asterisk leads to a footnote: "*Moment at which nine-year old Skyler Rampike realized irrevocably that in the lives of his parents whom he loved so desperately as in the vast world beyond the Rampike household Skyler Rampike was, at the most, but a footnote" (p. 280). In this textual metaphor, Skyler compares himself to a footnote, hence to a lesser element with

respect to the text—the dominating narrative mentioned by Lipsitz. All these stylistic and narrative choices lay the basis for a wider picture of abuse and neglect that goes way beyond the murder of Bliss. The next section of this essay will analyze the pattern of abuse recognized by Oates in the Ramsey case, and the commodification of children which appears to be a common feature of the American suburban home.

Children as commodities in the American Suburban Home

JonBénet Ramsey's murder was for Oates the ideal springboard to operate a criticism of some aspects of contemporary society, looking at them from the perspective of the Rampike family and the suburb of Fair Hills. She criticizes the golden life of the suburbs for its vulgarity, its exasperated consumerism, and for the effects it has on the institution of family. The author depicts not only their social class, but also how it produces a distorted vision of motherhood, which is dominated by ambition and the necessity of succeeding with every means possible, including the exploitation of children. These violated childhoods result in human beings unable to grow up, neurotic and affected by mental disorders and, as in the case of Bliss, precociously sexualized or raised to become miniature versions of their parents.

The people living in Oates's suburbs lead lives "of quiet vulgarity, punctuated only by demons descending from without or rising from psychological urges within" (Pickering, 1974, p. 220). One of the demons of Fair Hills is mentioned immediately by Skyler in the opening of his memoir: children have mental problems which are dealt with through medications (Oates, 2008, p. 8). Another demon is definitely the exasperated consumerism and the competition between households. This obsession is exemplified perfectly by the character of Betsey and her constant urge to possess things just to show the neighbours she is as good as they are. Her other preoccupation is that of becoming popular, so that she is ready to sacrifice everything, including her children. Skyler and Bliss become a commodity to enter the high society of Fair Hills: Skyler is forced to meet the children of the most affluent neighbours for playdates to which he reluctantly agrees, while Bliss is encouraged to pursue a career as a professional skater. The confusion between appearance and identity is not something that Betsey avoids, but the primary motive of her actions.

It is clear that behind the golden facades of many "ideal" suburban families lie serious conflicts, some caused by the anxiety for the future, or more precisely, as Cindi Katz puts it, "one's place in this future", which is a feature of many middle-class families (Katz, 2012, p. 173). Already in the 1940s, Marynia Farnham and Ferdinand Lundberg recognized, among the coping mechanisms to tame this anxiety, the accumulation of objects and goods (Farnham & Lundberg, 1947, p. 111): a dynamic that seems to involve the Rampike family as well. Betsey, in particular, "agonizes" because she is forced to host parties in a house that is "so unoriginal Colonial", while her guests possess hundreds of acres on a private mountain (Oates, 2008, pp. 156-157). What Bix believes is that no one will really pay much attention to their house, as they are there to see Bliss, since she has been defined by the media as a skating prodigy (p. 157).

The material aspect of life dominates Betsey's relationships, including the one she has with her children. The obsession with them—with Bliss in particular—reveals the multifaceted nature of motherhood as Oates conceives it in this novel. Mothers are, in her narrative, "afraid of their children as they watch them grow into separate beings whose nature they can never understand or control" (Allen, 1976, p. 148): a feeling that Betsey experiences when Bliss starts wetting the bed and giving cryptical and disturbing answers during interviews.

Betsey's competitiveness, even with her own daughter, is a quality that, according to anthropologist Sarah Blaffer Hrdy, contradicts the very idea of motherhood, as a mother is supposed to be "selfless and nurturing" (1999, p. 111), while competitiveness and ambition are quality that fit best in the professional world. For this reason, Bliss's career becomes Betsey's main job and preoccupation, turning her into her daughter's manager and ultimately change the family dynamics for the worse. Among the causes of dysfunctional families, Melanie Klein mentions the case where a child's individuality is not correspondent to what the parents wish it to be, and even more harmful is the parents' overambition and wish to gain reassurance "by means of the achievements of their children" (Klein, 1998, p. 321). Betsey is a textbook example of this attitude, as she lacks the nurturing features a mother should possess, and shows a devotion to her daughter that is uniquely dictated by the interest in her potential in terms of popularity. The narrator reports that the relationship between mother and daughter had been difficult right from the start, and only the prospect of a successful career as a professional

skater had made the girl "easier to love" (Oates, 2008, p. 90). The experience of maternal ambivalence, which is "shared variously by all mothers" and which involves the coexistence of "loving and hating feelings for their children" (Parker, 1979, p. 1), reaches in Betsey paradoxical levels, and it can be appreciated when Bliss is still a newborn in need of her mother's care. Skyler remembers that his little sister was, in the mother's eyes

> […] an exasperating baby demanding always to be fed […], demanding always to have her diaper changed, needing to be bathed and again fed, nappy-nap time and diaper changed, bath, towel dry, new diaper, all babies do is sleep, pee and poop and shriek like a cat being killed and babies try to win your heart by cooing and "smiling" and reaching their astonishing little baby-fingers at you but babies are SO BORING unable even to say their names or walk upright or go potty in the bathroom using the flush (Oates, 2008, p. 36).

The piece stresses how Betsey finds the actions to perform on her newborn daughter mindless and repetitive. The usually tender aspects of babies, their smiles for instance, do not instil any maternal instinct in the woman, as she finds her daughter boring and dependent. Dependency in daughters, once they are grown up, takes on other connotations. From mothers they learn how to be women, because "they teach [them] consciously and unconsciously, what women are" (Arcana, 1979, p. 35). Bliss wants to be taught how to be pretty, and the result is an intensive training that—given the age of the girl—presents abusive shades: "Mummy had trained Bliss to open her cobalt-blue eyes wide and to smile in a certain way not to "grin"- not to "grimace"- but to smile shyly, prettily. Smile just enough to show her beautiful pearly teeth" (Oates, 2008, p. 18). Even though Betsey has taught everything to her daughter on how to be "pretty", and she has made her a miniature version of herself, the relationship is still a competitive one. Because, "it is commonly assumed that mothers and daughters compete to see who is the most beautiful and sexually desirable" (Arcana, 1979, p. 102) and this competition is "initiated, or wholly carried on by […] mothers" (p. 103). The weapon used by mothers in such situations is reminding daughters of their weaknesses (p. 105), which Betsey does with her daughter when she begs her to give her the permission to participate in skating competitions. Betsey's reaction, when she has not yet realized the potential advantages of this activity, is to discourage the girl through harsh criticism of her bony face, and her small and strange eyes which stare people in a way that makes them uneasy (Oates, 2008, p. 88). The effect of Betsey's demeanour with her children produces two ruined

childhoods, a product of the social environment where they live and of two parents unable to carry out their educational role. The relationship Betsey has with Skyler and Bliss is a narcissistic one: she is not able to "differentiate between herself and her children", rather she displays, as many other suburban mothers, "an odd combination of smothering overprotectiveness and lack of affect" (Zaretsky, 2007, p. 189). It is not only the relationship with the mother, especially in Skyler, that provokes the worst damages. The environment where the boy is raised, along with the mother's demeanour, undermines his mental sanity. But the problems of the main character are actually shared by all his peers living in Fair Hills. The lives of these children are filled with every material comfort, but they lack a real childhood, as Skyler recounts in the chapters "Adventures in Playdates" I and II. The narrator recalls these encounters imposed by his mother, afternoons spent at the houses of other children in the neighbourhood where playtime is actually not involved. The kids he hangs out with are little kings who live in beautiful houses, with rooms lavishly furnished, but they are lashed by mental disorders that some of them display as trophies or merits. One of them, Tyler McGreety, instructs Skyler on the advantages of being the only child of two busy parents who make up for their absence with cash and toys (Oates, 2008, p. 112). Moreover, even if very young, Tyler understands that people bound to attend an Ivy League College cannot waste time playing. The anxiety for the future of these children starts quite soon, and Oates's criticism, which might seem an exaggeration, is confirmed by Katz who sees the tendency of parents to control their children's education through various expedients as another symptom of the already mentioned middle-class's anxiety for the future (Katz, 2012, p. 175). Betsey possesses the same anxiety towards her children, and that is why she sets up these meetings for Skyler, telling him that, thanks to them, "[…] [he] will make professional contacts for life" (Oates, 2008, p. 119).

The anxiety for the future stems, according to Katz, from the conception of children as investments and "commodities in themselves, absorbing and embodying the energies and ideas of their parents and others whose labors—affective and material—consciously and unconsciously—shape them as laboring subjects and social actors" (Katz, 2012, p. 175). This mechanism develops also with Bliss as soon as she reveals her skating talent. Betsey realizes that she can benefit, not only financially, from the ability of her daughter, so she tells her husband: "[t]rust me, Bix. Darling, have faith in me and trust me, our daughter is our destiny" (Oates, 2008, p. 139).

An excessive maternal control, which sociologist Sharon Hays defines as "intensive mothering" (as cited in Katz, 2012, p. 179), is one of the major causes of physical and psychological disorders in youth, often requiring pharmacological therapies (as cited in Katz, 2012, p. 181). In the chapter "Misadventures in 'Mental Health'", the narrator retrieves the long list of psychiatrists that took care of him after the death of his sister, and along with them, the list of the disorders he has been diagnosed with. These doctors conclude their visits with the prescription of a drug, but none of them can make the boy say what he really thinks about his childhood: "[…] for Skyler could not say yes it was my father, yes it was my mother. Could not say *They killed my sister, and they killed me*. He could not. He could not. He could not" (Oates, 2008, p. 420). Bix and Betsey destroy their children's childhood, imposing on them an impossible ideal of perfection and trying to involve them in their will to reach a higher social status. The attainment of this ideal is linked to the narcissism of seeing the parents' investment accomplished (Katz, 2012, p.182). The only sparkle of this perfection is present in Bliss, but the Rampikes also want it for Skyler due to his disability. Bix and Betsey try to minimize their child's impairment, and they claim a physical perfection from him, as in the following examples:

> "SKYLER, TRY NOT TO LIMP. YOU CAN WALK PERFECTLY NORMALLY, IF YOU make an effort. And please don't twitch, and squirm, and make those 'pain faces'- people will only be depressed, and want to avoid you" (Oates, 2008, p. 112).
>
> "Son. This way. Out the back. And don't fucking limp" (p. 522).

Betsey tells his son, when he is still very young, that his limping is something intentional, and that he would be perfectly able to walk normally if he wanted to. She exhorts him to suppress his twitching, his squirming, and his pain faces. All these gestures are inevitable for Skyler, because he cannot control them.

The obsession for Skyler's leg is still present when he is a teenager. Bix utters the second sentence during Betsey's funeral. Even in such a moment, the focus on appearance makes him say "don't fucking limp", as if Skyler could control it.

The same obsession for appearance and control is, of course, projected on Bliss, who is the embodiment of Oates's criticism on children's exploitation and commodification through beauty contests. Even if Bliss, differently from JonBenét, is a skater and not a beauty pageant queen, great attention is devoted to the way she looks

when competing. Indeed, Betsey dresses up her daughter as an adult in order to erase any childish aspect from her. The girl also gradually sheds any form of play time from her daily activities. In the chapter "Bad Girl I", Skyler illustrates his sister's routine, made entirely of exhausting training on the ice rink, classes with private teachers, and continuous therapies to cure a "phantom" pain she feels in her legs. The lack of play time subverts the characters of Bliss's childhood, since, according to Katz, it is a necessary activity for children to form their identity and their idea of the world (Katz, 2011, p. 56). Moreover, theirs should be "disposable time", "the greatest joy (and potential) of childhood" (p. 56). Bliss's time is shorn of this joy and potential, and she finds herself playing, only seldom, with a very old doll that Betsey tries numerous times to take from her. The girl talks to the doll with a voice that is "an eerie mimicry of [her mother's]", imitating her exhortations to work and pray harder to be "number one" (Oates, 2008, p.142). The girl's relationship with her doll is obviously not a playful one, and the object dates back to her early childhood, a time without competitions or training. The fact that Betsey tries to steal the doll from her several times shows the woman's will to erase that playful and careless aspect from her daughter, replacing it with more perfect objects: the dozens of more expensive and beautiful dolls she has turned her daughter into. The words of the girl are proof of how the woman has also shaped Bliss into a miniature copy of herself that uses not only an imitation of her voice but also the typical habits of her speech.

When Skyler asks his sister what is the name of the doll, her answer shows how the girl unconsciously considers that toy a surrogate of what she used to be before her mother decided to make her an athlete and to change her baptismal name, Edna Louise, in Bliss. The doll's name is, indeed, Edna Louise, Bliss's only trace of a past she was forced to give up.

Instead of the normal childhood of a six-year-old, Bliss—much as the figure that inspired her, JonBénet—finds herself living a life where she is displayed "as female merchandise" (Oates, 1999, p. 32). The children beauty contests, which in America are a big business, had become the focus of JonBénet's existence, as the skating competitions are of Bliss's. The way she is dressed and made up when competing reflects Oates's opinion on mothers who make up their daughters to make them look "luridly glamorous" (Oates, 2008, p. 103). The transformation of the girl is more and more dramatic. Betsey

dyes her hair, makes up her face, gets her teeth straightened, and dresses her as an adult, turning her, as it happened to JonBénet, into her mother's fantasy:

> […] Mummy has dressed Bliss as a doll-like replica of Betsey Rampike: both mother and daughter are wearing glamorous zebra-stripe dance dresses of crinkly, clingy velvet with provocatively tight bodices and flaring skirts, diamond-patterned black stockings and shiny black patent leather dance shoes adorned with red cloth roses (p. 162).

Betsey makes her daughter what she cannot be anymore, and she provokes, through the clothes and the make-up, a precocious sexualization of the girl, whose bodice is defined as "provocatively tight".

All these elements depict a pattern of abuse that might be partly fictional—with specific reference to the Ramsey Case—but which definitely applies to many American families whose children are only another asset in the struggle for success and popularity.

Conclusion

In a 2011 interview, Oates declared that the world of children beauty contests is "a very shocking world" where "most children are to some extent performing for their parents, wanting their parents to love them, to be so proud" (Foley, 2011). Parents, especially mothers, elicit in their children an atypical behaviour for their age, not differently from Bliss/JonBénet, who would never had "this strange child sexuality unless her mother had trained her" (Foley, 2011). The mother is apparently the one who can be blamed for the death of the girl, as in this fictional version of the Ramsey case readers find out that Betsey accidentally killed her daughter while staging a fake abduction to convince Bix to come back home after he had left. This is a confession that Betsey leaves in a letter to her son before she dies, clearing—in this way—Skyler from all the accusations that the press, and his consciousness, had made (Oates, 2008, pp. 535-542).

The narrative choice made by the author, that of solving at least the fictional cold case by revealing the identity of the murderer, can be seen as both a statement and a metaphor. By blaming Betsey for Bliss's death, Oates might have provided her version of the story of the Ramsey case, hence accusing Patsy Ramsey as many other commentators had done. But this choice can also be a metaphorical way to blame the woman for another crime: that of—perhaps accidentally, perhaps not—killing the innocence and the

childhood of JonBenét by dressing her up as an adult and teaching her moves and behaviours that were not adequate for a six-year-old. Her guilt is more generally that of commodifying her children, a sin that according to Oates—as other novels of hers show quite clearly[2]—is a generalized one in the suburbs. The writer's criticism of that kind of environment possesses characters that make it a universal one, hence a way to shed light on how child abuse can be located in unexpected places—those where children usually have everything—and take on unexpected and more surreptitious forms.

This recurrent theme in Oates's work is far from being "solved". Nonetheless, dealing with the theme of children abuse and neglect through true crime stories such as the Ramsey case undoubtedly turns out to be a way to bring them to the public's attention, lending them an authenticity that might help recognize the red flags behind a dysfunctional family, and perhaps preventing another tragic death as that of JonBenét.

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[2] A novel that is often compared to *My Sister, My Love* is *Expensive People* (1968) because it is set in the suburbs and it is inspired by another true crime story, albeit less famous than the Ramsey case, where a teenager kills his mother. The protagonist of the novel, who defines himself as a 'child-murderer', is also the author of a fake memoir where he recounts how and why he killed his mother Nada, another neglectful and complicated mother figure.

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ALTERITY IN AUTOBIOGRAPHY: CHARLES LAMB'S "*THE ESSAYS OF ELIA*"

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Abstract

This article scrutinizes the unorthodox turn in Charles Lamb's autobiographical writing through the figure of Elia with its potential to test the limits of alterity and one's representation of oneself while challenging at the same time the immunity of self as the origin of knowledge and truth. In so doing, this study also maintains that Elia as the autonomous entity calls into question the authority of the writer as well as any claim on teleology and coherence in the act of writing one's own life specifically. To this end, explication of some of the key passages in the essays is informed by Jacques Derrida's theoretical stance towards autobiography in his seminal work *The Ear of the Other*. In this vein, the article suggests that Elia's individuality and self-consciousness in the essays manifest in unorthodox ways the simultaneous interpretative potential of the figure as the reader of Lamb's life in making.

Keywords: autobiography, otobiography, otherness, alterity, deconstruction

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Although Charles Lamb's biography can largely be inferred from *The Essays of Elia*, he avoids self-absorption by portraying mere everydayness of his time and the individuals in his company; nonetheless, it should not follow that these figures are not of great importance to Lamb in the process of his life-writing, as well as to readers of his work who gain insight not only into a significant portion of the life of the man who bore the name Lamb, who, through his penname Elia, transforms his individuality into unknown possibilities in each essay. Lamb provides Elia with a vehicle for self-expression, enabling him to explore the full spectrum of human experience, from sorrow and joy to the nuances of philosophical thought and the ordinariness of everyday life; hence the approach of an objective, detached observer remains constant. Despite the distance between Lamb and his own self as portrayed by Elia, that which surfaces is a subjectivity in the appropriation of his life and an indivisible mixture of fact and fiction formed by Elia as the life of Charles Lamb it is very peculiar ways. Charles Lamb appears to have striven to overcome the considerable challenge of composing a personal account of his life in the form of his essays, which enables him conceal the personal reminiscences and reflections on humanity behind the persona.

Charles Lamb challenges the conventions of traditional autobiographical writing by presenting himself as Elia, a figure who embodies the one on the margins, the other. Such representations challenge the notion of self as the privileged origin of meaning, knowledge and truth, particularly in relation to past experiences and the present moment. In other words, as Sidonie Smith asserts, in traditional autobiographical writing, the self is not left in a state of indeterminacy, ambiguity, or heterogeneity (1993, p. 6). In this process, the chaotic is silenced, and a teleological, unique, coherent self emerges in its place, and what distinguishes Lamb’s approach from such orthodox autobiographical accounts is the absence of an essential purposiveness. Despite the recurrence of images such as old buildings, old people and scenes from the city in his writing, there is no clear sense of direction or purpose to be found. Elia effectively eliminates the direct correlation between the self that is expressed in the act of writing and the narrative that represents the subjectivity of the writer; in other words, the process of self-fashioning is disrupted by Elia’s diverse concerns that may encompass a range of subjects. Consequently, the focus on the ‘universal subject’, which is a central element in traditional autobiographical writing, cannot be maintained as an

autonomous entity within Elia's essays. Elia establishes a connection with other individuals while simultaneously maintaining his distinct identity. In contrast to the well-established autobiographical tradition, which has always flourished on the basis of a unified and coherent self, Elia's work demonstrates a more complex and nuanced understanding thereof in relation to society. Smith notes that this flourishing was predicated on the assumption of a singular and unified self, a narrative that resonated with the reader, and a mimetic medium that guaranteed epistemological correspondence between narrative and lived experience (1993, p. 17); however, Elia's work challenges this assumption by exploring the multifaceted and often contradictory aspects of the self in relation to society.

Nevertheless, this does not necessarily imply that Elia was able to negate the entire historical context of his era from his writings; he still alludes to a lived experience, suggesting a sense of closure in each essay, albeit not in the conventional narrative sense. Elia also manifests a kind of individuality and self-consciousness in his writing, which, in conjunction with his presence, gave rise to a text that was self-reflexive and transparent in its own dynamics. In the essays, Elia functions as a kind of literary machine, traversing the conventional boundaries of autobiographical writing. On the one hand, he attempts to recover what has been submerged in the enigmatic depths of memory, and on the other, he discloses his shortcomings, not in regard to his actions in life but in the process of narrating his life. Once the process of narration is complete, the machine is no longer functional, as there is no room for impatience in capturing life in its authentic state. To some extent, Elia fulfils his objective of deconstructing the conventional methods of relating one's life experiences to the format of his essays. In his analysis, Bruner posits that the "inner dynamics" of the writing of one's era, along with the cultural products that emerge from it, are subject to questioning and reinterpretation as time progresses: "Any autobiography configuring a life is not so much a matter of making new discoveries in the archeological record of our experiences, or of revealing the contents of previously hidden 'memories,' but of rewriting a narrative along different interpretative lines" (1984, p. 38). In the "Preface to the Last Essays," Lamb himself identifies this shift in interpretation following the cessation of Elia's narrative in its previous form. In light of the interrelation between Lamb and Elia as explored in various essays, the question of Lamb's estrangement from

Elia must also be considered in the context of Derridean deconstructionist theory as it pertains to autobiography.

The concept of the 'otherness' of the ear is a key theme in Derrida's work, *The Ear of the Other*, and is seen as a crucial yet challenging aspect of autobiographical writing. Jacques Derrida's (1985) approach differs from the conventional perspectives on autobiography in that he delves deeply into the unconventional autobiographical work of Nietzsche, *Ecce Homo*, employing an unconventional reading. In his lecture, "Otobiographies," Derrida addresses the limitations of textual representation and the enigmatic nature of life from a teleological perspective. In contrast, Derrida correlates the biological with the biographical, employing his own methodology to prompt profound inquiries into the events of signature, the reception of writing, and the inherent incompleteness of autobiography. In accordance with his arguments, the structure of the Nietzschean text leaves the meaning unfinished and the structure of the text cannot be reduced to any definitive 'truth' or even to its signatory. Conversely, the act of signature occurs when the message has been successfully received by the intended audience: "Nietzsche's signature does not take place when he writes. He says clearly that it will take place posthumously, pursuant to the infinite line of credit he has opened for himself, when the other comes to sign with him, to join with him in alliance and, in order to do so, to hear and understand him (1985, p. 50)."

The text is subsequently signed by the other; the event is thus conveyed to the reader, whose particular interpretation cannot be guaranteed. The readers are thus tasked with interpreting the Nietzschean text in accordance with the author's deliberate strategy of deferring the meaning within its structural framework, which is what removes the text from the boundaries of the autobiographical and places it within the field of otobiography. In order to hear and understand it, one must also produce it. Through this production, Nietzsche's signature is embedded in every reading. Derrida posits that, rather than representing a metaphysics of time, the concept of eternal return constitutes the very foundation of Nietzsche's expectations regarding his text. The concept of the eternal return, as experienced through the ears of others, serves to disrupt the closure of Nietzsche's signature. Furthermore, it is necessary to accept the inevitability of the future's unfolding, regardless of how it occurs, which entails transcending the duality of life and death that Derrida discusses in his lecture by

integrating them simultaneously into the text as quotations: "In order to understand anything at all of my Zarathustra, one must perhaps be similarly as conditioned as I am – with one foot beyond life" (1985, p. 9).

Derrida dedicates a significant portion of his analysis to the portrayal of Zarathustra in the "midday" section, emphasising his existence in a state of absolute equanimity, which enables Derrida to posit the existence of a past and future state, as Zarathustra is situated at an equal distance from both: "I look back, I looked forward, and never saw so may and such good things at once" (1985, p. 19). Charles Lamb, in a similar fashion, upon becoming aware of the terrible reality, loses his faith in Elia, who has become a figure too well-known to be the bearer of Lamb's signature. At this point, the dream-like aspect of Elia's persona becomes anchored in his own name, which is evident in the fact that Lamb seeks to connect with a "friend" of Elia who can provide a different point of reference, which is necessary for him. It is also more significant than it first seems, at this point, to note briefly some of the basic conceptions that surrounds the theories on autobiography in modern criticism as that of Gerald Monsman's in his article "Lamb's Art of Autobiography." Monsman identifies three fundamental components of an autobiography: *autos*, the remembering self of the author; *bios*, the life that forms the core of the autobiographical text; and *graphe*, which he defines as "the textual inscription wherein simulacra of the past and present experience are reified" (1983, p. 547). In order to gain insight into the significance of Elia, a pseudonym, the concept of simulacra proves invaluable in understanding the implication that the *auto* is merely a written form that coincides with the textual inscription, the *graphe*, which divides the life of Charles Lamb into at least two distinct phases: the past, which belongs to Lamb, and the present, which belongs to Elia, as evidenced in the essays. In contrast to the Rousseauistic tradition, as Monsman notes, which strives to assuage fears and address shortcomings (1983, p. 547), the collaboration of Lamb and Elia, with their distinct author roles, illustrates the futility of attempting to construct a unified and universal subject.

The distinctive form of Elia's essays, along with their structural and self-reflexive nature, convey meanings that extend beyond their literal content. These forms and techniques serve to equate the narrative meaning with the very structure of the texts. First and foremost, the events in Elia's life are not of a kind that may be experienced by

any individual in society; they are unique to Elia himself. Nevertheless, Elia immediately engages the reader with direct references and a sense of rhetorical authorship, fostering a sense of shared consciousness in both the text and the reader. In the opening sentence of "The South-Sea House," the author immediately engages the reader with a rhetorical question: "READER, in thy passage from the Bank –where thou hast been receiving thy half-yearly dividends... didst thou never observe a melancholy-looking, handsome, brick and stone edifice to the left...?" (p. 41). This technique not only piques the reader's interest but also subtly conditions the reader to perceive the surrounding environment in a particular way. Although it is evident that Elia is aware that not all his readers may be familiar with the location he is describing, he repeatedly makes bold assertions, as evidenced by the following example: "I dare say thou hast often admired its magnificent portals ever grasping wide, and disclosing to view a grave court, with cloisters, and pillars, with few or no traces of gores in..." (p. 41). He is aware of the extent of his rhetorical devices, which result in the conversion of the reader into the text. Rather than concealing the deficiencies of his rhetoric, he explicitly acknowledges them through phrases such as "I remember to have seen..." (p. 47). Furthermore, the locations referenced in his accounts serve to elucidate the characters of individuals from the past as embodied in the physical settings, and vice versa: "They partook of the genius of the place!" (p. 45). The conjunction of space and time in the act of narration results in the coexistence of the present and the past.

In his article "The Circular Journey and the Natural Authority of Form," William Zeiger posits that the form need only be sufficiently specific to evoke its archetype in the reader's mind. The reader may conclude, in accordance with the author's argument, that "Yes, that is the way things go" (1990, p. 209). Elia, however, challenges this assertion by eschewing the use of the past as a means of imparting lessons and instead directing the reader's attention towards a broader argument that deviates from his specific past experiences (Jessup, 1954, p. 246). His objective is to identify the distinctive quality within the context of the familiar, as he asserts in "The South Sea House:" "Whom next shall we summon from the dusty dead, in whom common qualities become uncommon?" The work of Charles Lamb evinces a depth and complexity that extends beyond the confines of the experiences of a mere vagabond. Rather than adopting the methodology of an archeologist, he explores the essence of a bygone era,

integrating the tangible world into his mental landscape in a seamless manner. As evidenced by the opening sentence of "South-Sea House," among numerous other examples, the reader is initially introduced to specific locations and subsequently guided into the realm of abstract experiences and sentiments expressed by the narrator (Haven, 1963, p. 142). To illustrate, in his adult world, fountains are "fast vanishing...dried up, or bricked over" whereas "one is left, as in that little green nook behind the South-Sea House, what a freshness it gives to the dreary pile!" (Lamb, 2011, p. 266). The theme of childhood is a pervasive one in Lamb's writing, frequently evoking memories from his own childhood. In this specific reference to another essay by himself and to his childhood memories, Elia employs a recurring image of 'water' in "The Old Benchers of the Inner Temple," and links his essays in a unified manner as if striving to fulfill his objective of composing his life, not in a teleological manner but in a cyclical one.

In addition, the form of Elia's essays is worthy of further consideration, particularly in light of the mockery that pervades each narrative. This does not necessarily imply that Elia solely mocks the reader's reading process through the constant revelation of the fictional aspects of the essays; instead, he also illuminates the potential inaccuracy of his narration through metafictional commentaries on himself and the written text. He highlights the challenges associated with recalling and interpreting his past experiences, emphasizing the fluidity and subjectivity of memory and interpretation: "P.S. I have done injustice to the soft shade of Samuel Salt. See what it is to trust to imperfect memory, and the erring notices of childhood.... let no one receive the narratives of Elia for true records! They are, in truth, but shadows of fact – verisimilitudes, not verities- or sitting but upon the remote edges and outskirts of history (p. 280)." The distinction between the author's actual experiences and the fictional elements becomes increasingly indistinct, given the inherent limitations of reproducing the original accounts. The reader is deceived to the extent that they permit it: "Reader, what if I have been playing with thee all this while –peradventure the very *names*, which I have summoned before thee, are fantastic –insubstantial- like Henry Pimpernel, and old John Naps of Greece:___ Be satisfied that something answering to them has had a being. Their importance is from the past" (p. 56). The significance of these figures is derived from the author's personal history, and is currently manifested

in his memories, although he is uncertain about the specifics of what he recalls. The only remaining possibility is that, despite the lack of evidence to the contrary, Elia did indeed exist.

From this point onwards, the focus shifts from the structure of the narratives to the question of whether a narrator such as Elia can be identified. One might even inquire whether he is an uncertain person. In Charles Lamb's narrative, the distinction between Elia's virtuosity and actuality appears to be non-existent, he is a self-sufficient entity, existing independently. The textual reality of Elia is disrupted by Lamb at a late stage, following the completion of Elia's role as a mask for Lamb. In essence, Elia is a more profound human being when confronted with the full spectrum of the self, encompassing not only its positive attributes but also its shortcomings and imperfections:

> Elia becomes Lamb's way of reinstating the life and its accidents, a pardoning and regeneration of the man-in-the-world without a disavowing of his guilt and morality. Through the Elian alter ego, Lamb can confess the fearful "story" of his personal guilt yet catch within his verbal net a limping reflection of his now absent wholeness (Monsman, 1983, p. 551).

This concept of "absent wholeness" represents the ordinary aspects of human existence, devoid of the idealised or perfected qualities often attributed to individuals. Elia eschews generalisations in favour of particularisation, whereby he highlights the uncommon aspects of individuals from the past. In lieu of pursuing abstract ideals and absoluteness, he proposes concrete human qualities. As Bertham Jessup notes, the author does not evade the realism of his society; rather, his realism encompasses a broader temporal range than the present and the practical (1954, p. 248).

In his writings, Charles Lamb presents Elia as a verifiable individual whose existence mirrors his own character; moreover, Lamb permits Elia to idealise itself not as a universal entity but as an individual situated within the context of the street and as a member of society. This represents a departure from Lamb's own position within the social order. Consequently, Elia can be regarded as an idealisation of Lamb without compromising its credibility. Elia represents the other in Lamb's person, whose role begins where the author's social status cannot afford to express him, which is achieved

through a consistent alternation of narration between Lamb and Elia. Concurrently, while commenting on Elia's life, Lamb also finds a means of commenting on his own life, thus affording multiple perspectives on a single event. The following example demonstrates how Lamb employs an unconventional technique to achieve an unorthodox confession. This technique has its roots in the earliest examples of autobiographical writing, in which the author divides themselves into two distinct personas: the first representing the 'lived' subject, the object of study; the second representing the 'unified' subject, capable of grappling with the past. What sets Lamb's approach apart from the majority of autobiographical examples is the absence of any attempt to disguise this self-reflection in the guise of complete consciousness in the present. Instead, he attempts to elucidate the distinction between his two selves as clearly as possible, thereby exposing the traditional and flawed assumption that a single subject can simultaneously grasp both the present and the past:

> IN Mr. Lamb's "Works," published a year ago or two since, I find a magnificent eulogy on my old school, such as it was, or now appears to him to have been, between the years 1782 and 1789. It happens, very oddly, that my own standing at Christ's was nearly corresponding with his; and, with all gratitude to him for his enthusiasm for the cloisters, I think he has contrived to bring together whatever can be said in praise of them, dropping all the other side of the argument most ingeniously. (p. 71)

Furthermore, Elia recalls L. at school. In other words, even when viewed as a subject of study, one can still recall Elia's "remembering L. at school...;" it is therefore evident that even when the subject is being studied, it is not possible to recall the past identity with the same clarity as it is experienced in the present. Conversely, it is not solely Elia who recalls past events. In "Christ's Hospital," Lamb makes reference to Elia's acquaintances when employing the first-person perspective. The following two individuals, presumed to be still alive, are identified as friends of Elia. Given the evident fact that Lamb began to compose with his own hand, it is pertinent to question why he employed Elia as a conduit. It is conceivable that he is now able to corroborate the past with greater ease, as the conclusion of Elia's life draws near. It would appear that he is unable to recall with the same clarity the past identity he had at school as he does the present. Conversely, it is not solely Elia who evinces a recollection of past events. In

"Christ's Hospital," Lamb refers to friends of Elia when the pen is in Elia's hand, stating, "Next follow two, who ought to be alive, and the friends of Elia..." (p. 95). It is curious that Lamb continues to utilise Elia as a vehicle, given that it is evident that he began to write with his own pen. It may be the case that he is now able to verify the past with greater ease, as the end of Elia's life draws near.

One might posit that it is Lamb who perceives the imminent demise of Elia. In the closing paragraph of "The South-Sea House" and in numerous statements in "Oxford in Vacation," Lamb, along with many others, begins to exhibit signs of mental distress despite Elia's continued role as the "proper name" that bears the burden: The reader may be forgiven for asking who Elia is. From this point onwards, he begins to confess, but still in the name of Elia. "I confess that it is my humour, my fancy –in the forepart of the day..." (p. 267). Lamb begins to dismantle the constructed persona of Elia as a means of disassociating himself from the burden of responsibility for the narrative, which had been created to absolve him of accountability for his own life.

In this essay, Lamb presents himself in stark contrast to the public figures of past times, as if to amplify the unspoken sentiments of Elia beyond their original scope: "Tipp never mounted the box of a stage-coach in his life; or leaned against the rails of a balcony; or walked upon the ridge of a parapet..." (p. 52-3). Since Tipp "was formal, ruled by a ruler" and since he "made the best executer in the world: he was plagued with incessant executorships accordingly, which exited his spleen and soothed his vanity in equal ratios" (p. 52). In contrast, Elia (that is to say, Lamb) appears to be the opposite. By juxtaposing himself with public figures, Elia asserts his identity and distinctive characteristics: "I am not the man to decide the limits of civil and ecclesiastical authority –I am plain Elia- no Selden, or Archbishop of Usher- though at present in the thick of their books, here in the heart of learning..." (p. 60). Elia is Elia, just as Lamb is Lamb, or Elia is Lamb. The crux of the matter is that it is the reality of Lamb, as perceived by both Lamb himself and by society at large, that renders Elia a popular persona. Once the mask of Elia is removed, the persona dies and is buried in the past, becoming one with antiquity: "Antiquity! thou wondrous charm, what art thou? That, being nothing, art every thing... the mighty future is as nothing, being every thing! The past is very thing, being nothing!" (p. 62).

In the "Preface to the Late Essays," Lamb offers a critique of Elia. The form of Elia's essays and Elia's admission to the public could not overcome the futility of Lamb's endeavour to construct a self. Elia's life, characterised by a sense of guilt, disappointment, pleasure and the mundane, is interrupted by Lamb at a point where it begins to diverge from the life of Charles Lamb and to deviate from the path of returning to the innocent times of childhood. Lamb makes it clear that the demise of Elia is neither a calamitous occurrence nor an unexpected one, he regards this event with composure and welcomes it with dignity: "This poor gentleman, who for some months past had been in a declining way, hath at length paid his final tribute to nature" (p. 29). Given that the mission has been accomplished, it is now time for him to depart. As evidenced by his tone in announcing his friend's demise, Lamb appears to regard the event as a burden he has successfully shed. Lamb considered Elia's essays to be somewhat rudimentary and lacking in polish. For Lamb, Elia's essays are crude

> "a sort of unlicked, incondite things- villainously pranked in an affected array of antique modes and phrases ... They had not been his, if they had been other than such; and better it is, that a writer should be natural in a self-pleasing quaintness, than to affect a naturalness (so called) that should be strange to him" (p. 30).

Lamb proceeds to articulate his perspectives on Elia, asserting that he was a distinctive individual, a mere mortal who was inherently incapable of comprehending his own nature. His philosophy was dependent on the experiences of an ordinary individual, rather than on the achievements of prominent figures: "He chose his companions for some individuality of character which they manifested. Hence, not many persons of science, and few professed *literati*, were of his councils" (p. 32). In addition, Lamb posits that Elia resented being treated with gravitas and sought to emulate the prevailing attitudes of his contemporaries. He behaved as though he were absent, yet simultaneously present. In Lamb's words, Elia would "interrupt the gravest discussion with some light jest; and yet, perhaps, not quite irrelevant in his ears that could understand it" (p. 31).

Elia fulfils at the this points its potential to find the contours of one's capabilities of writing one's own life in rather unconventional ways, having provided a room for alterity without the confines of one's part memories and present moment. The autonomy on the part of Elia enables Lamb to stretch beyond any teleology and

coherence as expected from conventional autobiographical writing. It is through eliminating the restrictions imposed on the writing subject and its self, Elia turn the floor on a self-conscious narrative which gives rise to the idea of Elia not only as a mere penname but simultaneously a reader of Lamb's life with its signature in Derridean terms; that is Charles Lamb's past and present are made present—in the sense also of representation—by Elia in enigmatic ways that are not much common to conventional autobiographical writing.

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'WELCOME HOME, OUR BITTER HOME!': RETHINKING NATIONAL IDENTITY IN NURUDDIN FARAH'S "*LINKS*"

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Abstract

Nuruddin Farah's *Links* (2005) represents the civil war-torn Somalia, and particularly Mogadiscio, from the perspective of Jeebleh, who returns to his homeland after twenty years. The novel, through Jeebleh's exilic perspective, interrogates the implications of national identity and sense of collective belonging in a society driven by clan politics. This article examines the representation of fragmented nationhood as a consequence of the civil war along with the narrative's portrayal of other forms of belonging and collectivity to engender an alternative understanding of national identity. I contend that *Links*, while maintaining its focus on the national space and what the nation stands for in times of crisis, also offers ways to envision connections between the national space and what lies beyond through the implementation of exilic point of view and literary and non-literary allusions.

Keywords: national identity, nation, exile, Nuruddin Farah, Somalia

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Contemporary literary studies, while focusing on the new sites of cultural identification and representation born out of the global world order, finds itself revisiting the idea of the nation to comprehend the prevalence and reconceptualization of national identity and belonging in a period marked by fluidity, mobility, and displacement. Globalization and the increasing political, social, and cultural interconnectedness of the world figure in greatly in the representation of the nation from a transnational perspective. Nuruddin Farah's *Links* (2005) turns its gaze to the nation and its current state of crisis in an attempt to elaborate on the underlying dynamics of national identity and its transformation in a transnational context. On the one hand, the novel portrays the nation's predicament of confronting the internal tensions that fracture the sense of collective belonging, thus positioning the narrative within a specific national space; on the other hand, its utilization of an exilic perspective as a mediator between the nation and its outside, as well as the rich intertextual allusions, move the narrative beyond its immediate national context, asserting its claim to be recognized as part of the larger world literary scene.

Simon Gikandi, while outlining the complicated relationship between globalization and postcolonial studies through their shared interest in 'transcend[ing] the boundaries of the nation state and provid[ing] new vistas for understanding the cultural flows,' draws attention to the role imposed on literary texts as paradigms of globalization such as hybridity, heterogeneity and fluidity (2001, pp. 628-32). While this perspective emphasizes the mobility of people and ideas and the subjectivities emerging from new encounters as represented in postcolonial texts, it is impossible to overlook the national contexts these texts are born out of and shaped by. Gikandi underscores that even when literary texts strive to 'deconstruct the foundational narrative of the nation' and claim their status as 'world texts,' they refer to the framework of the nation through an engagement with 'its history, foundational mythologies, and its quotidian experiences' (2001, p. 632). Thus, the attempt to transcend the national context brings forth a return to the idea of the nation to uncover the dynamics that define the nation in the first place. In a similar vein to Gikandi, Paul Jay asserts that literary texts with a transnational character 'transform the scope of national literatures to which they belong and push beyond national boundaries to imagine the global character of modern experience, contemporary culture, and the identities they produce' (2010, p. 9). Rather than

undermining the significance of the national space, this approach affirms the need to reimagine the nation and national identity in a broader and more complex web of historical, social, economic, and cultural relations. Indeed, Jay aptly points out that globalization does not bring forth the 'withering away of the nation-state;' instead, the contemporary moment is marked by the simultaneous presence of globalization and nationalism, where 'nationalist aspirations and identities' still retain their strength 'in the face of homogenizing, westernizing or cosmopolitan tendencies' (2010, p. 118). In Farah's novel, the dynamic relationship between these two frameworks occupies the center in the protagonist's attempts to understand the current state of the nation along with his sense of national identity and belonging.

Farah, 'a global nomad' in Derek Wright's words, has lived in exile for most of his life, which greatly figures in his imagination of Somali society and culture (2002, p. xv). His fiction traces the tumultuous history of Somalia from British and Italian colonialism, the Soviet and then American influence, the dictatorship of Siyad Barre to the Somalia as a failed state driven by clan loyalty. John Hawley states that Farah's keen interest in Somali culture centers on 'the tectonic friction between self-definition and tribal loyalty, between nation-building and diurnal obligations' (1996, p. 190). Farah's own displacement and cosmopolitan perspective play a crucial role in questioning the seemingly homogenous character of the Somali nation and the transformation of society. While his sense of displacement - whether physical or psychological - contributes immensely to his representation of the nation, it also marks the ambivalent nature of his relationship with the national space.

In *Links*, Farah employs the figure of an exilic intellectual who returns to his country to find himself in the middle of a politically charged environment and a highly fragmented society, as represented with the arrival of Jeebleh to the civil war-ravaged Mogadiscio after twenty years of exile in the States. As he negotiates his own status within the national space, the novel underlines the inseparability of the sense of estrangement and belonging through his ambivalent position as both an outsider and insider. His visit after so many years is prompted by several motives, the most important of which is to rediscover his Somaliness and assess his responsibility as a Somali who is both an outsider and insider due to his exilic condition. Fatima Moolla notes 'the reconstruction of self and society in the Somali civil war context' as the primary concern of the novel

(2012, p. 116). Farah's delineation of characters surrounding Jeebleh indicates that not only the city itself but also the people and relationships are tainted, in one way or another, by the destruction brought by the civil war. His old friend Bile, after spending years in prison, now runs a shelter, the Refuge, for the displaced with Seamus, their Irish friend from university days in Italy, while Bile's half-brother Caloosha, responsible for both Jeebleh and Bile's imprisonment years ago, has become one of the warlords in the north of the city. The dissolution of the society has paved the way for an overall sense of uncertainty where changing loyalties and competing stories cause Jeebleh to feel disoriented and question both the transformation of Somali society and its impact on his identity. *Links*, thus, frames Jeebleh's efforts to redefine and reconnect with his Somaliness within his rediscovery of Somali society.

The question 'What is a Somali, and what does it mean to be one?' as posed by Wright 'opens up a Pandora's box of political, ethnic, and moral quandaries' that Farah's novels interrogate on different levels (1997, p. 201). The novel portrays the dissolution of a sense of national belonging as clan identity determines the new social order in war-torn Mogadiscio. While Jeebleh's rediscovery of his Somaliness in this volatile environment discloses the transformative power of the national space, for better or worse, Farah also represents the interconnectedness of the local and the global through Jeebleh's outsider and insider status. In this article, I focus on the novel's representation of fragmented nationhood and the disappearance of collective belonging in times of disorder. The protagonist's ambivalent relationship with national identity will inform the analysis of national self-perception and self-representation to explore the narrative's portrayal of alternative ways of re-imagining the nation through its heterogeneity.

Rediscovering the Homeland

Links represents Jeebleh's transformation from an observer who has 'come to learn and to listen' to an active participant who is 'now part of the story, in that [he has] taken sides and made choices that put [his] life in danger' (2005, pp. 9; 215). This transformation compels him to become familiar with the new Mogadiscio defined by clan politics and lawlessness, as well as to consider his own responsibility inside and beyond Somalia. The novel, while delineating the dynamics of a Somali society driven by clan warfare, points outward to the media representation of Somalia and its peoples on an

international scale, especially during the US intervention as well. Jeebleh's characterization as a Somali American presents an opportunity to explore the ramifications of an exilic perspective when it comes to comprehend the social dynamics of civil war and its consequences on individuals. In this way, *Links* traces not only the dissolution of the society under clan politics but also the possible ways of reconstructing a sense of collective belonging that goes beyond blood lineage and clan differences.

Jeebleh's return to Mogadiscio is prompted by his life and death experience in a traffic accident caused by a Somali driver in New York. Although this event works as a trigger and sends him to Mogadiscio 'to disorient death,' the real reasons behind his decision appear more complex, connecting his personal history and the history of Somalia. While he publicly mentions his desire to find his mother's grave and honor her memory, his hope to help the recovery of his friend Bile's kidnapped niece Raasta and her friend Makka, and take revenge on Caloosha, Bile's half-brother responsible for Jeebleh and Bile's imprisonment and possibly the kidnapping, emerge as parts of his agenda as well. Eleni Coundouriotis draws our attention to the almost too obvious allegory between the dead mother and the 'war-torn and unrecognizable Somalia,' the motherland (2014, p. 254). Jeebleh's attempt to honor his mother's memory is juxtaposed with his desire to witness the devastation of Mogadiscio and come to terms with it. However, the other items in his agenda eventually lead him to take up a more active role than that of mere dutiful son, leading to another allegorical representation when Jeebleh appears as a responsible son of the motherland through a more direct engagement with the ills of Somali society. On a more profound level, Jeebleh's quest for self-discovery and questioning of his identity as a Somali problematizes Somaliness within and outside the national borders. Jeebleh has come back not only 'to assess the extent of [his] culpability as a Somali' but also 'to reemphasize [his] Somaliness – give a needed boost to [his] identity' (2005, pp. 32; 36). Farah illustrates the complexity of self-definition as Jeebleh faces the dilemma of stripping himself of both Somalis' and Americans' imposition of clan identity on him and maintaining his now newly imagined Somaliness. Moolla states that Jeebleh's return to Mogadiscio 're-establishes a "link" with the homeland' through which he re-discovers himself and connects with people having the same mind-set as he does (2012, p. 119). However, the novel also indicates the difficulty of leaving behind the

already existing links, namely blood lineage, despite Jeebleh's disdain of clan politics and ancestry as the basis for identity.

Links opens with Jeebleh's arrival to Mogadiscio, a city that is both familiar and strange after all the destruction and thus serving as a microcosm of the nation. As the narrative follows him from the moment of his arrival in Mogadiscio to his departure for the States, the city, through its past and present, emerges as a key character for understanding the current dynamics of Somali society. Driven by clan warfare, Mogadiscio presents Jeebleh with a glimpse of prevalent violence shortly after his arrival at the airport as an armed young man shoots a random person – a ten-year-old boy – on a bet (2005, p. 16). The contemporary Mogadiscio is governed by new sets of rules in the absence of a central authority and state, entirely different than the Mogadiscio Jeebleh remembers: 'orderly, clean, peaceable, a city with integrity and a life of its own, a lovely metropolis with beaches, cafes, restaurants, late night movies' (2005, p. 35). According to Coundouriotis, this nostalgic portrayal of the city, through the omission of its status as a colonial city, places Mogadiscio both in and out of history (2014, p. 241). In a way, it is possible to see his description as the ideal image of the city that Jeebleh cherishes through his personal connection to Mogadiscio. However, Farah is far from depicting Jeebleh as ignorant of the damage created by different parties throughout time. In fact, while the novel presents us this almost too idyllic image of Mogadiscio that Jeebleh holds dear, the overall narrative emphasizes the painful history of the city that finally brings it to the brink of destruction in the hands of Somalis themselves. The novel, early on, provides the reader with a brief history of Somalia, and in a sense Mogadiscio, that traces the violent interventions upon the country throughout centuries:

> [O]ne army leaving death and destruction in its wake, to be replaced by another and yet another, all equally destructive: the Arabs arrived and got some purchase on the peninsula, and after they pushed their commerce and along with it the Islamic faith, they were replaced by the Italians, then the Russians, and more recently the Americans, nervous, trigger-happy, shooting before they were shot at. The city became awash with guns, and the presence of the gun-crazy Americans escalated the conflict to greater heights. Would Mogadiscio ever know peace? (2005, pp. 14-5)

What is missing from this history is the destruction and violence brought upon the country by Somalis themselves, namely Siyad Barre's dictatorship years and the current state of lawlessness with the rise of warlords. The novel, while acknowledging the violent history of foreign occupations, directs its focus to the contemporary moment where Mogadiscio is transformed and destroyed, both spatially and socially, through clan politics. As the city is divided into two main zones controlled by StrongmanSouth and StrongmanNorth, along with areas of no-man's land, Harry Garuba, in his analysis of the spatiality in the novel, states that 'blood lineage determines physical residence, the social space of possible association and of possible political loyalty' (2008, p. 187). While this re-organization of the city along bloodlines does not prevent civilians from crossing the green line, as evinced by Jeebleh's trips between the north and south of the city, it nonetheless limits the mobility and the possibility of interaction between people from different clans, bringing forth the question of how to envision the Somali nation as a whole again.

The novel's representation of the dividedness of the society through Mogadiscio's spatial organization finds its counterpart in Jeebleh's obsession with pronouns, especially 'we,' as a marker of clan-based identity politics. Pronoun confusion or obsession, as described by Jeebleh, proves crucial in comprehending people's idea of collective identity through blood lineage in a war-torn country and its significations for Jeebleh. Early on, he questions every utterance of 'we,' such as by Af-Laawe, the mysterious figure welcoming him at the airport who, later on, turns outs to be Caloosha's man, as well as by the hotel manager Ali. Jeebleh half-heartedly interprets these utterances as emblematic of inclusivity coming from sharing the same clan. While this use of 'we' imposes a clan-based Somali identity on him to a certain degree, his status as an outsider along with his commitment to a self-definition independent of blood lineage establishes a division between him and those who define themselves through clan. He is unsure of 'how to define himself here' with 'his ability to choose whom he would associate himself with,' unlike other characters who have, willingly or unwillingly, yielded to clan-based identification (2005, p. 41). When one of the gunmen confronts Jeebleh about his disregard for blood relations and, instead, prioritization of friendship, the narrative underlines Jeebleh's privileged position, namely his life in the States, which sets him apart from those in Somalia, creating another 'we' and 'they' distinction that goes beyond the

national borders and blood lineage. In this case, his Westerner status, or Americanness rather than Somaliness, determines his perception in the eyes of others. However, the novel presents the most insightful approach to the use of 'we' and 'they' through Seamus. When Jeebleh tells him that he is using 'we' to refer to Somalis in general and 'they' to refer to clan politics and its supporters, he responds: 'Enemies matter to those who create *them* … when you think of *them* as "they" and therefore create *them* yourself, then it follows that you become an enemy to *them* the moment you opt out of their inclusive "we"' (2005, p. 219, emphasis in original). The clan members' botched attack on Jeebleh, after he refuses to finance their war efforts, provides a concrete example of Seamus's conceptualization of the distinction. Once Jeebleh denounces his clan identity and disrespects the clan elders, he turns into an enemy in their eyes, no more included in their 'we.' These different layers of 'we' and 'they' underscore the instability and complexity of self-definition, especially for an outsider like Jeebleh, and undermine any possible imagining of a unified Somali society until people are ready to overcome the inherent animosity in the 'we' and 'they' distinction.

While Farah's novel portrays how clan identity drives society to its edges, it also draws attention to the deeply ingrained sense of distrust and betrayal among Somalis, which hinders the creation of any meaningful and genuine connection among individuals. In a way, the novel searches for answers to the question 'how does one know anyone in a land where people are constantly reinventing themselves?' through Jeebleh's attempts to form an opinion about the civil war and the new Somali society based on different stories he hears (2005, p. 23). Jeebleh soon realizes that in a society where rumor serves as the main source of information, he must be suspicious of everyone and every version of events. Moolla asserts that betrayal, especially 'the betrayal of one Somali by another,' lies at the core of the hellish atmosphere of Mogadiscio (2012, p. 122). The novel, through Af-Laawe, points to a more horrifying aspect of betrayal in the Somali civil war context: 'You're killed by a person with whom you've shared intimacies, and who will kill you, believing that he will benefit from your death' (2005, p. 137). Indeed, betrayal or its suspicion is presented as the reason for several shattered relationships in the novel: Caloosha has betrayed both his brother and Jeebleh by imprisoning them – and possibly killing Bile's father; Faahiye, Raasta's father, is suspected of working with his daughter's kidnappers; Jeebleh feels the need to clear the air with Bile in case his own early release

from prison created any suspicion of betrayal in his friend's mind. The novel, while acknowledging the exacerbating impact of the civil war, re-positions the theme of betrayal and distrust beyond clan-based strife, more as a continuation of the ills of the violent past marked with, first colonialism and then dictatorship. As Jeebleh thinks about Somalis' deference to guns rather than uniforms and badges as a sign of authority, he realizes that Somalis' mistrust in the authority of uniform goes back to the nation's history where those in uniform, and in power, have proven to be corrupt and unjust (2005, p. 8). Thus, by reminding the far-reaching effects of the past violence and suffering, the novel indicates the gradual fragmentation in the social fabric of the nation and its zenith with the present moment.

Rebuilding the Community

If the novel represents the dissolution of society on various levels, it also offers examples of alternative forms of social spaces that defy clan politics and promote inclusivity regardless of clan, religion, or any other social identification. The portrayal of these spaces bears significance for the narrative's unearthing of the inherent potential to overcome the dividedness of the society. Three such places emerge as examples where people bond with one another not through blood or clan but through their choice and commitment: Jeebleh and Bile's childhood home; Seamus, Jeebleh and Bile's apartment in, first, Padua and then Mogadiscio; and the Refuge. The household constituted by Jeebleh and Bile's mothers not only challenges the traditional patriarchal values of Somali society but also establishes an environment where two children from different clans (Jeebleh and Bile) grow up almost as brothers. Here, it is important to note that even though Caloosha shares the same space, he remains outside the familial bond between the other two. While Caloosha and Bile share the same mother, they are fathered by two different men from different clans. Since Caloosha's father is from the same clan with Jeebleh's, in Somali traditions they are regarded as closer to one another as members of an extended family. In fact, it is Caloosha's 'unusual cruelty' as a child that intensifies the bond between Jeebleh and Bile as they try to avoid his bullying (2005, p. 94). Without his desire to be part of this relationship, neither his connection to Bile through blood nor to Jeebleh through clan can serve as a link to tie him to this fraternal bonding, thus noting the novel's emphasis on the individual will in the creation of transformative alternative spaces. Jeebleh, Bile, and Seamus's shared flat, first in Padua and then in Mogadiscio, creates an

environment where friendship creates its own country, 'spacious, giving, and generous.' (2005, p. 56) Annie Gagiano underlines 'the integrity of chosen affiliations' in the face of clan or national identity, and states that their friendship is emblematic of 'the common good, humane values, moral courage and energetic enterprise' (2006, p. 265). 'The country of their friendship' that started in Padua and reached to Mogadiscio finds a new symbol in Seamus's mind, an olive tree: '[W]hen the top branches die, a fresh trunk with a new lease on life emerges. And the tree bears fruit between the ages of five to ten years, and may not reach full maturity until after twenty!' (2005, p. 193) As their friendship gets older, it also matures and ties them to another more strongly than before. Seamus's flat in Mogadiscio, thus, serves both as a reminder of their old days in Padua and a starting point to conceive a new form of collective space that can be built upon the values of their friendship. These two households, with their substitution of the traditional family structure, enable the emergence of new forms of affiliation that can replace kinship with a personal commitment as the foundation for a sense of belonging.

While these two examples indicate private spaces with transformative potential, Farah delineates the Refuge as the embodiment of an alternative public space that can overcome the damage created in Somali society by the civil war. The Refuge stands out as a center of peace with its sheltering of the displaced, schools and dormitories for children, and a medical clinic. In order to analyze the significance of the Refuge within the narrative, one should consider the role of Raasta in the creation of this peaceful space as well as the implications of her "miracle child" status for the society. Raasta, whose given name Rajo means hope, draws people around herself together in peace, and people believe that 'anyone in her proximity is safe from the harm of civil war' (2005, p. 304). Raasta is always accompanied by Makka, an orphan with Down syndrome who 'communicates boundless, generous love' (2005, p. 161); together they embody the spirit of the Refuge with their openness and inspiration for love and hope. In the novel, Bile explains that, unlike other miracle children, 'his niece had "secular" beginnings, and had nothing to do with the religious fervor.' (2005, p. 302) However, the names of two children, Raasta and Makka, have obvious allusions to religious traditions: Raasta with Jamaica-born Rastafari, which considers Ethiopia as a mythical homeland and worships Haile Selasie I who was crowned as the king of Ethiopia in 1930, and Makka with Islam, the predominant religion in Somalia. Garuba suggests that Raasta's body 'becomes the site around which the

conventional heterogeneity of city life can be performed,' whereas Makka signifies 'the arrested development of the country and the city and the potential locked away in its inarticulacy' (2008, pp. 193-4). Their inseparability, along with their presence in the Refuge, represents the seeds of a new social order that can heal the wounds of the civil war. The implementation of *mayida*, the traditional practice of eating together, in the Refuge aims to instill trust and collective good through shared meals, hence keeping hatred and animosity out of this new social space, and perhaps out of people's lives as well. As Bile describes it: 'anyone meaning to do harm to a fellow sharer of the *mayida* will not dare look him, or anyone else, in the eye,' which prevents the presence of anyone with hostile feelings in the Refuge (2005, p. 158). Thus, there cannot be 'bad blood' between those who share the *mayida*, which ensures peaceful communality. In this way, the novel portrays the Refuge as a microcosmic experiment of how the future Somali society, or Somali nation in a broader sense, could be constructed around new values independent of clan identification and its divisive politics.

The Refuge provides Jeebleh with the opportunity to envision a different future Somalia with its potential for healing and focus on fostering dialogue and fraternity. While the city he remembers is long gone, the new Mogadiscio can be built upon the example set by the Refuge. Given that Raasta and Makka constitute the soul of this safe haven, their abduction, inevitably, affects Jeebleh as well. As mentioned before, facilitating the girls' release constitutes one of the motives behind his visit to Mogadiscio. In a city where people are reinventing themselves, Jeebleh reinvents himself as 'the white knight figure' (Bystrom, 2014, p. 413) in the belief that he can 'recover the two girls from the clutches of their captors' (2005, p. 92). His self-assigned role as a hero coming from afar to rescue the girls, and to kill Caloosha, presents a rather problematic aspect of Jeebleh's transformation in Mogadiscio. While the novel discloses moments of self-doubt about the increasing influence of the civil war atmosphere on his personality, Jeebleh is depicted as justifying any possibility of his participation in a crime through an appeal to common good and justice. One of his contemplative moments demonstrates a rather telling characterization of Jeebleh: 'He knew he was capable of pulling the trigger if it came to that. His hand went to his shirt pocket, where he had his cash and his US passport' (2005, p. 69). That he checks his wallet and American passport right after considering committing a crime underscores the fact that he has the means to flee the country once

the crime is committed. The novel's juxtaposition reasserts his outsider status; unlike Somalis living in Mogadiscio, he is only visiting and can go back to his home in the States anytime, leaving the violence and uncertainty behind. Furthermore, it begs the question to what extent Jeebleh is willing to become part of the future Somalia and to contribute to its transformation to a more peaceful society in his ambivalent position and self-identification.

Reconsidering the Outside and the Inside

Jeebleh's status as both an outsider and insider to Somali society comes under scrutiny in different ways. His view of present-day Somalia is mostly informed by what he has seen in the international media. Although he strives to maintain his distance from these sensationalist representations of civil war, they appear to be all he has as an outsider. Bile and Jeebleh's conversation on an American journalist's view that Somalia is better off without a government, in fact 'an ideal model' for other African countries, reveals Jeebleh's limited knowledge, or ignorance, about the current dynamics of Somali society (2005, p. 153). As Bile fervently opposes the idea, pointing to the scarcity of social services without a central government, he also explains the tightly knit relationship between warlords and business cartels. Jeebleh's response is quite revealing, 'It doesn't look that way from the outside!' (2005, p. 154) Moolla suggests that Jeebleh's limited view of the crisis in Somalia leads him to undertake 'his singular intervention,' namely rescuing the girls and arranging the death of Caloosha (2012, p. 124). However, it is also his strong desire to be part of the story and to re-affirm his Somaliness that impels him in his actions. Coundouriotis describes Jeebleh's undertaking as 'his own Operation Restore Hope' with Raasta's given name Rajo meaning hope (2014, p. 240). In addition to the meaning of her name, Raasta stands for the hope of peace for Somali society; seen in that way, Jeebleh's participation in her rescue will serve the greater good and connect him to his nation.

Farah's portrayal of Jeebleh's mission, however, brings forth problematic parallels with the original Operation Restore Hope, as the novel depicts both these interventions coming from the outside and unsettling the already fragile dynamics with questionable outcomes. To examine these parallels, one, first, needs to look at the novel's discussion of the US presence in Somalia. If, as Bile argues, Americans 'started putting on a circus for the benefit of prime-time TV back home,' Farah elaborates on the underlying dynamics of

the failed intervention and its consequences for Somalis (2005, p. 260). Dajaal's elaboration on the difference between American soldiers and himself illustrates the intervention's inevitable failure: 'I was prone to fear, like the Marines, and alone in my fear too. But I wasn't in a strange country, I knew *why* I was doing what I was doing, and I knew *where* I was, even in the dark!' (2005, p. 269, emphasis in original) Compared to Dajaal, the Marines are disoriented, both literally and figuratively. *Links* underscores the uncertainty surrounding the US presence in Somalia; while they arrive on a peace mission, their presence perpetuates violence, followed by their sudden departure, which leaves the country in more chaos than before. With Jeebleh, the circumstances surrounding his visit are more complicated, involving both his and the country's past, present, and future. However, he is almost as equally disoriented as the Marines when he realizes that the dynamics of war-ravaged Mogadiscio are difficult to interpret and draw people to violence, including himself. Seamus's cautionary words, 'make sure you aren't sucked into the vortex,' foretell the danger awaiting Jeebleh (2005, p. 215). While Jeebleh justifies his role in Caloosha's death in the belief that it will 'improve the lives of many others,' he can be now seen as culpable as any other Somali through his rationalization of violence (2005, p. 332). Indeed, his sudden departure, without saying goodbye to his friends in the fear that 'he might alienate them,' indicates a sense of guilt while 'the sun intruding on the horizon of his mind' suggests a realization that he will have to face the consequences of his participation in violence (2005, p. 334). In the end, we can consider his Operation Restore Hope successful: the girls are released and Caloosha is dead. However, in addition to Jeebleh's departure, Bile's distraught and disconcerted state after his half-brother's death leaves the novel rather open-ended with respect to the overall outcome of Jeebleh's intervention, in a way similar to the novel's emphasis on the ongoing repercussions of the US intervention in Somalia.

The novel's preoccupation with the US intervention and its impact on the Somali nation reveals itself in two main areas: the representation of the intervention and crisis in international media, and the Somali side of the story. The novel presents these versions not as competing but as complementary narratives that need to be examined side by side to assess the constructed nature of media representations as well as the missing voice of Somalis in these narratives. The narrative notes that Somalia stands for arbitrary violence and death for those whose opinions are formed by media representations of the country

(especially the footage of the US Ranger being dragged on the streets, which the novel brings up in precisely this context). As Jeebleh's daughter tells him 'no body bags, please' with the other daughter describing Somalia as a 'god-awful country' before his trip, Farah's novel, in fact, strives to complicate the logic behind these assumptions based on Western interpretation of the events (2005, p. 17). Ines Mzali states that Farah's novel illustrates literature's contribution to the contextualization of the international intervention, which is mainly framed by reductive journalistic narratives (2010, p. 85). The novel, by juxtaposing the image of the dead ranger with the image of Dajaal's granddaughter blown into the sky by a US helicopter, creates an alternative representation of the events that includes the Somali side without renouncing the atrocity of the ranger's death. The baby girl, left permanently damaged and incommunicative, alludes to the lost voice of Somalis in the international media. The narrative, moreover, strives to position the Somali case next to other international interventions, such as the one in the Gulf, where violence becomes a staple along with the sensationalist media representations. Coundouriotis asserts that this attempt places 'civil-war Mogadiscio in an expanded context, both geographically and historically' (2014, p. 243). By moving the Somali national context to a transnational perspective, Farah opens a window to consider Somalia as part of a broader world history marked with interconnectedness rather than singularity.

In addition to Farah's efforts to connect the story of Somalia to other historical and geographical contexts via media (mis)representation, his utilization of Dante's *Inferno* works as a structural and thematic thread in Jeebleh's journey to Mogadiscio and repositions the national vis-à-vis the transnational. Each part of the novel opens with an epigraph from *Inferno*, so the reader first comes across Dante's lines before starting to read the novel itself. The first epigraph evokes not only the violent and bleak atmosphere awaiting Jeebleh in Mogadiscio with the words 'suffering,' 'eternal pain,' and 'miserable people' but also the familial bonds that shape contemporary Somali society with the question 'who were your ancestors?' as posed by the guide. As it ends with 'they said he was a liar and father of lies,' the first epigraph, in a way, encapsulates the major thematic strands of the novel, namely the destruction brought about by the civil war, clan politics, and the uncertainty surrounding the different versions of events. While the epigraphs work as signposts, they invoke Dante's hell as a backdrop to Farah's representation of

Mogadiscio, through which the city becomes associated with an un-worldly place. One can argue that civil war conditions strip people of their humanity to the degree that they are ready to kill those who are close to them, as illustrated by Af-Laawe's remarks about intimates becoming the enemy. With the signs of death everywhere in the city, such as carrion-eaters looking for food, armed youth happy to pull the trigger, and the funeral service provided by Af-Laawe, Mogadiscio conjures up a hell in the world. As the novel informs the reader that Jeebleh worked on a Somali translation of *Inferno* during his days in Italy, the intertextuality gains a personal aspect as well, conjoining Jeebleh's past and present. When we consider the fact that Italy was one of the invaders in Somalia's history, Farah's intertextual reference to a classic work of Italian literature in a novel about Somaliness can be regarded as connecting past and present on a broader context with an allusion to the history of colonialism. In contemporary Mogadiscio, Jeebleh encounters, in a way, another translation of *Inferno* where 'hell is a warlord who's ransomed his soul to Satan, in exchange for elusive power' (2005, p. 58). Jeebleh, taking over the role of the pilgrim, lives his own version of Dante's *Inferno*, where he is to experience the devastated city and its people, which transforms him for better or worse.

Conclusion

Links, through the exilic figure of Jeebleh, problematizes the implications of Somaliness both in the defunct nation-state of Somalia and in a transnational context. The ambivalent status of Jeebleh as an outsider and insider enables a more profound engagement with what is seen from the outside and what is really happening in Somalia. It is only through this status that he is able to hear the untold stories and reposition himself in Mogadiscio. Jeebleh's failed attempts to navigate the seemingly familiar social order and to distance himself from the violence engulfing the society underscore not only the transformation of the nation but also its transformative power on him. Furthermore, the national space not only transforms the exilic individual but also becomes transformed by him, as evinced by Jeebleh's actions in Mogadiscio. Although the extent and form of transformation in the novel is open to discussion, it nonetheless assigns agency to the national space and indicates openness to change and a possibility for a better future. At the end, Jeebleh's embrace of his share of guilt in the civil war eventually emphasizes his insider status, thus his actions in the national space disclosing the unsevered ties to Somalia and his responsibility and culpability in its past, present, and future.

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HYPERREAL REPLICAS IN JULIAN BARNES' "*ENGLAND, ENGLAND*"

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Abstract

This article aims to examine Julian Barnes' *England, England* through Jean Baudrillard's influential concepts of hyperreality and simulation, illuminating profound resonances with the postmodern condition of contemporary Western societies. The novel portrays a world increasingly governed by models, signs and simulacra, challenging traditional notions of authenticity and reality. The theme park's replication of English culture, history and identity exemplifies how simulations and hyperreal constructions have saturated domains like tourism, nationhood, historical narratives and media representations. The novel encapsulates Baudrillardian themes such as the blurring of reality/illusion, the eclipse of the original by replicas, and the commodification of culture into marketable experiences. This mirrors contemporary experiences where the virtual and artificial hold sway over the authentic, fuelled by forces like consumer capitalism and the media. The actors' embodiment of historical roles reflects how mediated depictions shape public memory more than facts. Ultimately, the novel's vision of a hyperreal England supplanting traditional conceptions of nationhood resonates with contemporary anxieties about meaning and truth in a world dominated by simulations. By vividly fictionalizing Baudrillard's philosophical perspectives, the novel offers insightful views on modern complications distinguishing reality amid our self-constructed simulations.

Keywords: Julian Barnes, *Simulacra and Simulation*, Hyperreality, Baudrillard, Postmodernism

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In his novel *England, England*, British author Julian Barnes crafts a hyperreal world where simulation holds sway over reality. This fictional realm serves as fertile ground for examining theories around authenticity — a concept that lost its meaning when entering the world of simulation — and national identity in an increasingly technology-driven era. Specifically, Barnes' work resonates with philosophical questions posed by French theorist Jean Baudrillard in his influential book *Simulacra and Simulation* regarding representations overtaking reality. The article will examine how the simulated theme park Barnes constructs within the novel aligns with Baudrillard's orders of simulacra, where replicas and models obscure and replace authentic reality. Specifically, elements such as the childhood puzzle map, the cloning of English identity for replication, the actors immersed in simulated historical roles, and the eventual triumph of the fictional theme park England, England over the 'real' England will be explored using key Baudrillardian concepts. The discussion will provide a close reading of the novel, analyzing how shifts from symbolic representations into pure simulation provides a vivid fictional embodiment of a hyperreal world. This examination ultimately centres on Baudrillard's philosophical interrogation of authenticity, and the way that replicas overtake their referents in order to highlight the deeper levels of contemporary society, national identity, and the interplay between reality and artifice as portrayed in Barnes *England, England*.

In his seminal book *Simulacra and Simulation*, Jean Baudrillard focuses on the dominance of hyperreality in the contemporary world, where representations (re)shape reality. He extensively elaborates on the dissolution of boundaries between authenticity and simulation. Hyperreality, as Baudrillard indicates, belongs to a state in which reality, artificial reproductions, and simulation becomes entangled in each other, henceforth the distinction between the two is arduous: "[i]t is no longer a question of imitation, nor duplication, nor even parody. It is a question of substituting the signs of the real for the real" (1981, p. 2). Here, Baudrillard argues that postmodern culture is characterized by substitutions of simulations for the real itself. Representations constitute their own autonomous realm rather than imitating or duplicating reality. The signifier, then, represents nothing external, and it is "its own pure simulacrum" (Baudrillard, 1981, p. 6). This primacy of representations over reality aligns with the perspective that in the realm of simulacra, where the "sign is preferred to the thing signified, the copy to the original,

representation to reality, appearance to essence truth is considered profane, and only illusion is sacred," supplementing Baudrillard's notion that simulations construct their own autonomous reality disconnected from their referents (Debord, 1967, p. 6).

To exemplify hyperreality, Baudrillard offers the example of Disneyland, which he positions as the epitome model. He argues that Disneyland encompasses itself as an imaginary space, a theme park domain filled with symbols, illusions, spectacles and three-dimensional simulations, whose true purpose is to conceal the fact that the society is an artificial construct:

> Disneyland is presented as imaginary in order to make us believe that the rest is real…. It is no longer a question of a false representation of reality (ideology) but of concealing the fact that the real is no longer real, and thus of saving the reality principle. (Baudrillard, 1981, p. 12)

In this sense, Disneyland, as a simulated space, does not provide the object itself; rather, it "produce[s] illusion, but—in confessing it—stimulate[s] the desire for it" (Eco, 1973, p. 44). In other words, the hyperreality of Disneyland creates a world where "faked nature corresponds much more to our daydream demands" than authentic reality (Eco, 1973, p. 44).

Baudrillard also offers the example of the Watergate scandal as an event demonstrating the encroachment of reality into hyperreality. He draws a parallel between the simulated fantasy of Disneyland and the political revelations of Watergate as constructed spectacles operating on the boundaries of fact and artifice. The extensive media coverage of Watergate served to dramatize the original events through proliferated narratives and imagery that overshadowed the factual occurrences. Watergate derived greater meaning from its mythologized position in public discourse rather than its basis in evidence. As Baudrillard states, it "conceal[ed] that there is no difference between the facts and their denunciation," (1981, p. 14) thus the representations assumed precedence over the reality they depicted. This blurring of boundaries between factual events and fictionalized media reconstructions exemplifies history ceding ground to reconstituted hyperreality.

In a similar manner, Baudrillard suggests that in the era of postmodernity, history has undergone a profound transformation, shifting from a record of factual events to a

constructed narrative that is increasingly detached from its original occurrences: "[h]istory itself invades the cinema according to the same scenario" (1981, p. 43). For Baudrillard, historical films and accounts now serve ideological functions of cultural mythology rather than evidencing actual past events when he indicates that "[i]t is by virtue of this fact that it [history] takes the place of myths on the screen" (1981, p. 43). Here, he indicates the absorption of the past into fictionalized hyperreal renditions moulded to present purposes rather than tangibly rooted realities. This postmodern confinement to hyperreal history resonates with Fredric Jameson's perspective that we are now "condemned to seek History by way of our own pop images and simulacra...which itself remains forever out of reach" (1991, p. 25). In a way, it is the inaccessibility of the past that allows its manipulation.

Baudrillard further illustrates his idea of hyperreality in the realm of cloning and holographic technology. He states that cloning is the endpoint of replication since "everyone can dream, and must have dreamed his whole life, of a perfect duplication or multiplication of his being" (1981, p. 95). Cloning facilitates the endless duplication of human cells to produce identical replicas. This represents the potential realization of the ultimate simulacrum—an artificial copy indistinguishable from its model that disrupts traditional notions of identity as he indicates that through cloning "[i]t is no longer really the real, because no imaginary envelops it anymore" (Baudrillard, 1981, p. 2). Likewise, Baudrillard envisions holograms as a technological manifestation of attaining pure simulation. Holographic projections generate three-dimensional simulation seemingly transcending material into a hyperreal space. As he indicates, "[i]n the hologram, it is the imaginary aura of the double that is mercilessly tracked...just as it is in the history of clones…similitude is a dream and must remain one…in order for a modicum of illusion and a stage of the imaginary to exist" (Baudrillard, 1981, pp. 105-106). The hologram's ability to reconstruct reality without origin exemplifies the postmodern proliferation of models and artefacts claiming autonomy from stable referents. Both human cloning and holograms demonstrate Baudrillard's vision of simulations progressing towards pure self-referential replication detached from reality.

Baudrillard extends his theoretical critique to mass consumer society, embodied by suburban hypermarkets. Hypermarkets serve as prime examples of simulacra, spaces where the symbols and signs of consumerism have become detached from their original

meanings. Baudrillard describes the hypermarket as a space devoid of traditional visual relief or perspective in which "[n]o relief, no perspective, no vanishing point where the gaze might risk losing itself" (1981, p. 75). Unlike traditional art or landscapes where the gaze can wander and potentially get lost, the hypermarket presents a total screen filled with a continuous, unbroken display of billboards and products "total screen where, in their uninterrupted display, the billboards and the products themselves act as equivalent and successive signs" (Baudrillard, 1981, p. 75). Within these hypermarkets, products cease to be merely functional items and instead become symbols of identity and status. Shoppers are thus immersed in a hyperreal world, where the act of consumption no longer satisfies genuine needs but rather serves as a simulation of desire and identity construction.

In the following sections, a close analysis of the novel will be given which puts forward the argument that contemporary societies have lost their access to the original and are obsessed with the replica. The abundant, all-around virtual reality world in the novel, this paper argues, has becomes the reality of the contemporary human beings. Therefore, the scope of the novel goes beyond what Barnes depicts as a fictional world for the reader to imagine. Indeed, the all-encompassing fictional world of replicas shapes the mind of the contemporary individual without giving him as chance to experience a tangible world of external reality.

Childhood Map as Symbolic Order

Simulation manifests itself at different junctures within the novel. The inception of the orders of simulacra and hyperreality becomes discernible in the novel's opening chapter. Barnes explores the intricate relationship between memory, simulation, and the construction of a nation through the character of Martha Cochrane. Examining the dysfunctionality of memory, Martha's inability to recall a true first memory underscores the elusive nature of human recollection, as she asserts "there's always a memory just behind your first memory, and you can't quite get at it" (Barnes, 1996, p. 10). Martha's attempt to create her first memory involves the fabrication of a scene with a jigsaw puzzle in the kitchen. This childhood memory, symbolized by the puzzle, evolves into a metaphor for nation-building, which, in the context of late capitalism, has increasingly become a constructed entity. The completion of the puzzle parallels Martha's yearning for a sense of wholeness and completeness in her understanding of England. As Barnes notes, "Staffordshire had been

found, and her jigsaw, her England, and her heart had been made whole again" (1996, p. 12). The jigsaw puzzle, representing England, becomes a central theme in Martha's life. As her father completes the puzzle by providing the last piece, it symbolizes the artificial and crafted essence of a nation coming together. The puzzle also serves as a metaphor for the fragmented nature of memory. Martha's interaction with the puzzle introduces her to the concept of simulacra as her first memory transforms into a hyperreal space, leaving her unable to differentiate between what is real and what is fictitious.

Martha's early experience with the jigsaw map foreshadows her later construction of hyperreal simulations that replace reality altogether. In both instances, the map attains autonomy, marking Martha's entry into a Baudrillardian experience of simulated places. The puzzle map, as a second order simulacrum, exemplifies the shift from reflection to the creation of an autonomous system of signs, challenging traditional notions of representation in a postmodern world. As Baudrillard articulates, "[i]t is no longer a question of imitation, nor duplication, nor even parody. It is a question of substituting the signs of the real for the real" (1981, p. 2). Therefore, with the death of the real there is no way to access it, and the replica offers itself as the original.

Sir Jack Pitman's Philosophy of Simulation

The second chapter of *England, England* stands as its focal point, encapsulating a convergence with the majority of Baudrillard's concepts. In this pivotal chapter, Sir Jack Pitman embarks on an ambitious project to construct a replicated version of England. This endeavour is an amalgamation interplay of personal ambition, business acumen, and a yearning for control. However, Pitman's worldview also reveals "anthropocentricism that privileges human voices over other beings" and an indifference toward environmental impact (Ates, 2023, p. 129). His approach reflects a capitalist perspective of "treating [nature] as a commodity and resource for industrial development" (Ates, 2023, p. 129). Pitman envisions the theme park as a utopian escape, an idealized rendition of the nation that blurs the boundaries between reality and simulation. In a discussion with his colleagues, Sir Jack poses profound questions that penetrate the very essence of reality: "[w]hat is real? This is sometimes how I put the question to myself. Are you real, for instance – you and you?" (Barnes, 1996, p. 34). Sir Jack's inquiry serves as a profound philosophical reflection on the authenticity of existence. By addressing his employees

with such question, he not only questions the external reality of individuals but also probes into the core of their identities. Then, sir Jack deliberately answers his question "[m]y answer would be No. Regrettably. And you will forgive me for my candour, but I could have you replaced with substitutes, with … simulacra" (Barnes, 1996, p. 34). Sir Jack's discontent with the authenticity of the world resonates deeply with Baudrillard's philosophy in a hyperreal environment, where the distinctions between reality and simulation become increasingly elusive. His readiness to replace real individuals with simulacra underscores society's evolving preference for simulated experiences over the genuine. Sir Jack extends his contemplation to the very fabric of society, questioning the reality of money and God: "[i]s money real? It is, in a sense, more real than you... [i]s God real?" (Barnes, 1996, p. 34). His theories on God align with the concept of symbols evolving into simulacra, detached from their original meanings: "that deep down God never existed, that only the simulacrum ever existed, even that God himself was never anything but his own simulacrum" (Baudrillard, 1991, p. 4). This uncertainty about the nature of reality reflects the broader postmodern condition that Baudrillard theorizes, where "the whole system is swamped by indeterminacy, and every reality is absorbed by the hyperreality of the code and simulation. The principle of simulation governs us now, rather than the outdated reality principle" (Baudrillard, 1976, p. 23). This encapsulates the destabilization of reality Sir Jack intuits, as simulations and hyperreal codes supersede concrete realities.

Continuing his philosophical exploration, Sir Jack questions the authenticity of his name and the reality of great ideas, embodying the pervasive nature of hyperreality in the postmodern age: "[i]s my name … real?" and "[a]re great ideas real?" (Barnes, 1996, p. 35). In this, Baudrillard's notion of hyperreality is vividly illustrated, where signs, symbols, and concepts detach from their original referents. Sir Jack's uncertainty about the reality of great ideas reflects the ambiguity inherent in a hyperreal world. Baudrillard's ideas underscore the challenge of distinguishing between the real and the simulated, sparking an ongoing quest for authenticity and meaning in a society saturated with simulations.

The dreams Jack Pitman has for England closely align with the ideas of Tony Blair, the former prime minister of England. He also aimed to recreate the history and concepts such as nationhood, Britishness, and British culture in line with what he called the "spirit

of national renewal" (qtd. in Navarro Romero, 2011, p. 247). Thus, he led his politics to inspire a modern nation characterized by a dynamic, multicultural, innovative and young country able to lead and set the example of a twenty-first century nation. His ideas were to create a cohesive society "which was entrenched in strictly British terms, causing British values and institutions, which promoted a unified national identity, to be celebrated" (qtd. in Navarro Romero, 2011, p. 248). In this parallel pursuit of constructing national identity, both Pitman and Blair engage in the creation of simulacra. Pitman's theme park becomes a second-order simulacrum, a hyperreal space where symbols and tropes are artificially engineered to meet marketable expectations. Blair's national renewal similarly involves a symbolic reconstruction of British values to inspire a cohesive society.

Sir Jack Pitman invites a French intellectual, bearing a striking resemblance to Jean Baudrillard, to discuss simulation and replication with his team. This French intellectual emphasizes the contemporary preference for replicas over originals, stating "[w]e prefer the reproduction of the work of art to the work of art itself" (Barnes, 1996, p. 52). The intellectual offers examples like the Bayeux Tapestry Museum, where visitors spend more time in front of a replica than the original, highlighting society's shift toward simulated experiences. Furthermore, the intellectual explores human psychology and our relationship with authenticity. Referencing Viollet-Le-Duc's preservation work on old edifices, he suggests a psychological aversion to the profound reality of the original. This aligns with Baudrillard's idea that simulations offer a refuge from the overwhelming power of authentic reality, emphasizing the psychological and existential aspects of our fascination with replicas.

The intellectual contends that modern life blurs the line between reality and representation, indicating that "[a]ll that was once directly lived has become mere representation" (Barnes, 1996, p. 53). This transformation, influenced by media and technology, reflects Baudrillard's ideas on the prevalence of symbols replacing authentic experiences. His assertion that the modern world is not a substitute for the "plain and primitive world," (Barnes, 1996, p.54) but rather an "enhancement and enrichment" (Barnes, 1996, p.54) encapsulates Baudrillard's concept of hyperreality, where contemporary existence is marked by the amplification and intensification of signs and symbols over the original reality: "[s]imulation is no longer that of a territory, a referential

being, or a substance. It is the generation by models of a real without origin or reality: a hyperreal" (Baudrillard, 1981, p. 1). In other words, the simulated world has devoured every form of reality and represents itself as the only authentic form of representation.

The intellectual dismisses the original as "sentimental and inherently fraudulent" (Barnes, 1996, p.54) and demands replica in a world saturated with simulations, because it is a more controllable reality. His statements that we may "meet, confront, and destroy" (Barnes, 1996, p.54) the replica as our destiny indicates his obsession with a world dominated by hyperreality and the perpetual interplay between reality and simulation. At the end, the French intellectual congratulates Sir Jack Pitman for his ideas and his ambitions to replicate England into a theme park.

Replicating England into a Theme Park

In deciding the location for the theme park, the team faces a challenge, laying out a map resembling Martha's childhood jigsaw puzzle. Sir Jack insists on designing an exact replication of England, aiming to "offer the thing itself" (Barnes, 1996, p.59). Sir Jack gets close to Baudrillard when he indicates that once built, the theme park becomes its own entity, a "pure simulacrum" (Baudrillard,1981, p. 6). England, England mirrors Disneyland as meticulously designed theme parks founded on simulation. Baudrillard's description of Disneyland as a "perfect model of all the entangled orders of simulacra" applies equally to England, England (Baudrillard,1981, p. 6). Both attract crowds by presenting illusions of the real nation, creating microcosms concealing the shift into hyperreality. In both, visitors are immersed in a simulated world.

The microcosmic operation of both theme parks parallels Baudrillard's observations about Disneyland. They claim to represent the essence of their nations while concealing the wider nation's moving into hyperreality. England, England meticulously reconstructs English elements, potentially diluting their vitality. While the theme park aims to flawlessly recreate aspects of English culture, ironically this precision enables the simulations to spiral out of control. The meticulous simulation allows employees to "over-identify with a character or to unconsciously reflect some unknown characteristics of the original" (Arargüç, 2005, p. 148). Despite the park's efforts to reconstruct English identity and history, the sheer replication itself sows the seeds of destabilization. Sir Jack's aspiration to craft an exact replica initiates a hyperreal process, disconnecting from the

original and establishing a self-contained world. Like Disneyland, the focus is on a compressed representation rather than capturing the complexities of real life. The theme park meticulously reconstructs English heritage, history, and culture within its bounds through exhibits, attractions, and costumed interpreters. Details are engineered to match expectations and assumptions of national character even, as Parrinder suggests "the supposedly authentic past might be a fantasy, while the replica might seem truthful" (qtd. in Vanessa Guignery, 2006, p.111).

As standalone microcosms, these theme parks allow the wider nation to slip into hyperreality unnoticed. Their illusion that the park represents the real nation provides cover for the entire country losing touch with reality. Both Disneyland in America and England, England in the Isle of Wight reveal blurred lines between real and simulation. These independent simulacra obscure the fact that the nation's identity has become an artificial construct mediated by signs and symbols, blurring the distinction between inside and outside their gates.

Sir Jack Pitman vehemently rejects the notion that his project is a mere theme park; he envisions it as something far beyond. Sir Jack aims to surpass and replace the very notion of reality. He articulates his genuine objectives, stating, "[w]e are offering *the thing itself*. Der Ding an sich" (Barnes, 1996, p.57). Sir Jack believes that a simulation, over time, naturally transforms into the very thing it imitates, challenging the conventional understanding of authentic reality. He emphasizes this idea by indicating, "[i]t becomes *the thing itself*" (Barnes, 1996, p. 59), suggesting that the simulation of nature becomes the new reality. The project's goal is to meticulously reconstruct the entirety of England, intending to offer visitors an immersive and pleasurable experience. The limited historical knowledge of the public becomes evident in an interview conducted by Dr. Max with a representative of the target demographic. The responses regarding historical events left Dr. Max disheartened, highlighting the need for an accessible and engaging approach to history.

Sir Jack seeks to capitalize on people's limited knowledge of their history. He tasks Jeffrey, his Concept Developer, and Dr. Max, his Official Historian, to conduct surveys and research, intending to manipulate historical information to make it appealing to a global audience. The emphasis is on digestibility rather than accuracy: "the point of our history

will be to make our guests... *feel better*" (Barnes, 1996, p. 67). So, a list of top fifty characteristic of Englishness is prepared which includes various items, among others, like "Big Ban, House of Parliament, BBC, Tower of London, Oxford/Cambridge, and Wembley Stadium" (Barnes, 1996, p. 78). The authenticity of national identity and history is brought into question, casting doubt on the legitimacy of lists and research related to these concepts. The generated list condenses the essence of England and Englishness into fragmented elements, highlighting the conceptual and constructed nature of a nation's identity. The fragmented nature of this list aligns with the Baudrillardian perspective of constructing a replica without an original foundation, resembling the notion of cloning. The team's effort to create an amplified and glorified version of England for the theme park reflects the complex interplay between reality and simulation in contemporary culture, where the replica often challenges and overshadows the original.

Cloning National Identity

Baudrillard takes cloning as a metaphor for the proliferation of simulacra in society, asserting that cloning represents the culmination of body history, reducing individuals to abstract and genetic formulas for serial propagation: "[c]loning is thus the last stage of the history and modelling of the body, the one at which, reduced to its abstract and genetic formula, the individual is destined to serial propagation" (Baudrillard, 1981, p. 99). In parallel, England, England mirrors this concept by endeavouring to clone English identity into 50 distinct elements, echoing cloning's reduction of living beings to replicable genetic code. The list that the team project offers meets the denial of Sir Jack since he wanted to adapt his perception of Englishness. The list, a dissection of Englishness into replicable symbolic attributes, closely parallels cloning's process of reducing a being to re-constructible genetic code. This process of serial reproduction involves a consequential loss of uniqueness and singularity, effectively abolishing the original cultural context of items like Big Ben and Cricket, reminiscent of Baudrillard's statement that "[c]loning radically abolishes the mother, but also the father" (Baudrillard, 1981, p. 96). In this sense, cloning replaces the natural forms of reproduction and erases any meaningful connection between the producer and the produced.

The list prompts contemplation regarding the dissection and replication of a nation. We have entered an era of simulation where history, in its traditional sense, has

lost its meaning. Authentic historical narratives are now supplanted by simulations of history, causing a profound metamorphosis in our understanding of the past and national identity. While there may have been a time when the concept of nation held an authentic meaning, the era of late capitalism has transformed it into a simulation of itself. Can a nation, now existing primarily as a series of simulacra, truly be broken down into defining items? Is it conceivable for these components, already divorced from their original context, to reassemble into a coherent entity within a different framework? These questions inherently cast doubt upon the notion of a genuine and authentic national identity. Following the simulation of the Royal Family on the island, the fabricated identity gains independence, attracting global tourists. Satisfied visitors may perceive no necessity for experiencing the original country, thereby contributing to the emergence of a fabricated national identity. This phenomenon aligns with Sir Jack's attempt to deconstruct and subsequently rebuild Englishness. Sir Jack's efforts to reconstruct a cohesive national image resonate with Tony Blair's pursuit of creating a cohesive society: "[w]e in our country have our certain idea of le patrimoine, and you in your country have a certain idea of Eritage" (Barnes, 1996, p. 52). However, this reconstruction of national image in a new style ends up in vain and it will be merely a façade since as some indicate "Britain's first and foremost touristic profit comes from that traditional, idyllically rural and stereotyped representation of the country" (Navarro Romero, 2011, p. 249). In this regard, we can safely assure that a nation can be constructed in an idealized manner, as Christine Berberich illustrates that "nations, whether imagined or not, are, of course, not nature-made. They are contained within man-made boundaries; they are run according to rules set by man" (2008, p. 168). Such a perspective highlights the fact that the concept of nation has strong cultural connections but no natural ties.

Consumer Hyperreality

Following the discussion of the cultural heritage behind the England, England theme park, it is important to delve into the processes of commercialization and marketing, as well as the concept of hyperreal tourism in relation to Baudrillard. According to Baudrillard, "[p]eople go there to find and to select objects - responses to all the questions they may ask themselves" (1981, p. 75). In the novel, Sir Jack promotes the theme park as "everything you imagined England to be, but more convenient, cleaner, friendlier, and more efficient" (Barnes, 1996, p. 160). This statement echoes hyperreality,

emphasizing convenience and idealized qualities as reflected in the park's strategy of offering replicas for consumer satisfaction. Baudrillard's perspective on billboards and products acting as successive signs mirrors the theme park's transformation of England into a hypermarket of cultural commodities: "total screen where, in their uninterrupted display, the billboards and the products themselves act as equivalent and successive signs" (1981, p. 75).

In the postmodern era, projects like England, England thrive as consumers favour simulacra over reality. The theme park commodifies England's heritage, turning actors into commodities. Visitors willingly engage with hyperreality, emphasizing Baudrillard's argument that convenience and perceived authenticity drive the shift towards simulations, reshaping perceptions of reality and authenticity. This transformation of culture into commodities reflects the depth of hyperreality, where representations become detached from original meaning. As Fredric Jameson indicates, this primacy of simulation occurs in a "society where exchange value has been generalized to the point at which the very memory of use value is effaced" (1991, p. 18). Jameson's point about the effacement of use value in favour of exchange value within hyperreality aligns with the theme park's commodification of culture solely for commercial profit and tourist consumption. The park transforms quintessential elements of English heritage and history into consumable spectacles and simplified snapshots detached from their broader cultural context. Visitors pay for temporary access to this fabricated microcosm where complex and nuanced cultural artifacts become commercial products. For Baudrillard, "whole new sociality" emerges as a consequence of this preference (1981, p. 75). England, England reflects a societal shift that values simulations over authentic experiences. Baudrillard emphasizes that within this hypermarket, there is "no relief, no perspective, no vanishing point where the gaze might risk losing itself" (1981, p. 75). The incorporation of actors simulating historical figures aligns with Baudrillard's notion that simulations generate a hyperreal version overshadowing the original, crafting idealized representations of history.

Actors Embodying Hyperreal Roles

The England, England theme park manifests as an intricately crafted hyperreal rendition of English culture, drawing visitors into an environment where quintessential

elements are meticulously replicated. Baudrillard's concept of simulation articulates in the observation "[p]eople no longer look at each other, but there are institutes for that. They no longer touch each other, but there is contact therapy" (1981, p. 13). This resonates with the theme park's transformation of interpersonal engagement into staged simulations. The actors, assigned costumes associated with historical figures, play their roles according to scripts, blurring the lines between reality and simulation. This hyperreal tourism underscores a contemporary fascination with idealized representations, where authenticity surrenders to the allure of meticulously crafted illusions.

Throughout the narrative, the actors undergo a notable transformation, shedding their individual identities and embracing the characters they portray. This loss of personal identity is exemplified in instances such as the actor playing Samuel Johnson, who not only assumed the persona but even changed his name, as evidenced in the statement: "Martha called up Dr Johnson's contract of employment... They had engaged Samuel Johnson to play Samuel Johnson. Perhaps this explained things" (Barnes, 1996, p. 182). Despite attempts by project managers to monitor and restrain the actors, they manage to transcend themselves into a realm of hyperreality, embodying their roles to a point where the boundaries between self and character diminish. This immersion reflects Baudrillard's broader perspective by stating that "what has occurred is a materialization of aesthetics everywhere under an operational form. It is indeed because of this that art has been obliged to minimalize itself, to mime its own disappearance" (1993, p. 16). The actors exemplify this materialization, as their artistic performances as historical figures lead to the disappearance of their actual identities. Visitor complaints emerge as a paradoxical confirmation of the success of hyperreality within the theme park. Rather than desiring authenticity, visitors express a preference for idealized replicas, seeking a more jovial and stylized rendition of historical characters, even if it contradicts the true nature of those figures. The visitor complaints highlight a societal inclination to favour the hyperreal over the authentic since they "prefer the replica to the original" and "the reproduction of the work of art to the work of art itself" (Barnes, 1996, p. 52).

A notable example involves the reconsideration of the Robin Hood myth within the theme park since the team managers believe that the well-known myth needs refurbishing for modern audiences, emphasizing the need to adapt folktales to contemporary sensibilities. The ensuing transformation of Robin Hood and his Merry Men within the

hyperreal setting, turning them into mischievous figures causing disorder. Notably, the actors themselves succumb to the hyperreal environment, genuinely believing they are the historical figures they portray. Martha's interaction with the king, where she reminds him of his kingship being limited to the island, and his emphatic reply, "I'm the fucking King anyway, he shouted. Anywhere, everywhere, always" (Barnes, 1996, p. 165, emphasis added), exemplifies the employees' delusion. Their immersion in the hyperreality leads to a form of psychosis, where they accept their made-up stories as more real than reality, refusing to acknowledge their symbolic status (Arikan &İpekçi, 2020).

The Triumph of Hyperreal England

In the concluding segment of the novel, "Anglia" emerges as the triumphant domain of simulacra, overshadowing the original reality. Martha, expelled from the project, reluctantly returns to the 'real England', now transformed into 'old England'. The overwhelming majority of the population is ensconced in the theme park, erasing the memory of the genuine England. Old England metamorphoses into the village of Anglia, a place that, as described, is "neither idyllic nor dystopic" (Barnes, 1996, p. 222). This transformation encapsulates the tension between a yearning for a lost reality in the past and the endeavour to resurrect it in the present, portraying Anglia's nuanced nature as it oscillates between the search for reality and childish nostalgia. The conscious and artificial attempts at constructing historical narratives, shaping a national identity, and reviving the old England reveal their fake, simulated nature beneath the seemingly idyllic surface of Anglia. In this sense, the members of the community in Anglia are not very much different from the actors in England, England who paid to play some roles. As Peter Childs points out, "Anglia returns to its supposed past, losing its contacts with the outer world and losing its technological prosperity, but reclaiming a seriousness about its misremembered traditions" (2011, p. 122). This suggests that the attempts to recreate the nostalgic Anglia is itself a simulated version of it. Barnes through Anglia presents a form of "fabulation" where a semblance of coherence "between things that are largely true and things that are wholly imagined" (qtd. in Arikan and İpekçi, 2020, p. 184). Ultimately, the novel navigates the dilemma of reconciling the true nature of reality with an enduring yearning for meaning in a post-reality world dominated by simulations.

Conclusion

Through its intricate fictional portrayal of a nation eclipsed by its own hyperreal simulation, Barnes' *England, England* offers a remarkably prescient exploration of postmodern conditions as theorized by Baudrillard. In the novel's world where the replica transcends and replaces original reality, Barnes vividly conveys Baudrillard's critique of Western societies becoming disconnected from authenticity and consumed by self-perpetuating simulation cycles. The novel dismantles assumptions about such concepts as national identity — transitioning from lived realities to mediated experiences in our digital age — cultural heritage, historical truth, and the ability to discern the genuine from the artificial. The theme park's exaggerated and artificial portrayal of Englishness grows beyond just a commercial attraction into a self-sustaining alternate reality that overshadows and replaces the real nation itself. This mirrors how simulated realities, and artificial constructs have filled and subsumed nearly every aspect of modern-day human experience. Tourism, media, politics and consumerism have become perpetually reconstructing narratives, identities and desirable representations as authenticity erodes. Barnes' work compels us to confront the disorienting and unsettling nature of our current era. We are surrounded by all-encompassing virtual realities, glorified national narratives that are more myth than truth, corporate commodification of cultural heritage, and mediated portrayals that distort and obscure factual historical accounts. These simulated experiences and fictionalized depictions have become inescapable facets of the human condition. The actors transcending their costumed roles to embody historical personas reflects the postmodern instability of subjectivities and identities adrift in a sea of contingent simulations. Through this intricate fictional world that uncannily echoes key aspects of Baudrillard's theory, *England, England* illuminates the complex interplay between reality, representations and the hyperreal in contemporary societies.

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"ALL THAT GLITTERS IS NOT GOLD": REFLECTIONS ON JAVOR GARDEV'S PRODUCTION OF WILLIAM SHAKESPEARE'S "*THE MERCHANT OF VENICE*" AT THE BULGARIAN NATIONAL THEATRE

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Abstract

The article reviews Javor Gardev's recent production of Shakespeare's *The Merchant of Venice* on the stage of the Bulgarian National Theatre in the context of the play's long debated generic ambiguity and the "unpleasant" issues it confronts. It argues that even though, due to good historical reasons, the issue of antisemitism has attracted most of the attention so far, the central "unpleasant" issue in the original text is patriarchalism and the inequality between men and women. The play and the production's divergent treatments of this issue are considered in the context of today's antifeminist backlash, as well as the more general tendency to withdraw from traditional Western values, such as democracy, freedom, human rights. The current global and locally Bulgarian perspectives are discussed in order to demonstrate the urgency of taking a clear stand in support of these values.

Keywords: English literature, drama, Shakespeare, theatre, politics, culture, Bulgaria

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What makes *The Merchant of Venice* "unpleasant"?

William Shakespeare's *The Merchant of Venice* is a problem play in at least two interrelated ways. On the one hand, it poses a problem to critics by eluding clear-cut generic categorisation. On the other, it is likely to create problems to directors because it touches issues that have remained sensitive ever since Shakespeare's time. In terms of genre, the play, although formally a comedy, combines both tragic and romantic characteristics, and as W. H. Auden observes must be classed among Shakespeare's "Unpleasant Plays" (1962). As far as "unpleasant" issues are concerned, the foremost problem undoubtedly is the play's antisemitism. A more careful analysis would uncover also other important forms of otherness – women as the Other gender, foreigners (aliens) as the ethnic, racial and linguistic Other, homosexuality as the Other sexual orientation. Nevertheless, the text of the play manages to accommodate all these problems in a logically coherent, meaningful structure that even has a happy ending.

The generic ambiguity of *The Merchant* derives mainly from the play's twofold design. It weaves together two distinct plots that take place in two disparate settings. The first develops in Venice and tells the story of the sordid, "pound of flesh" bond and the harsh punishment of Shylock. The second unfolds in Belmont and relates how Bassanio wins Portia's hand in marriage by choosing among three caskets. From the point of view of Shakespeare's London, Venice is a realistic place – a hectic, early modern, mercantile city, where what matters is entrepreneurship, business acumen and the accumulation of capital. Belmont, on the other hand, is a romantic, fairy-tale, idealisation of the feudal aristocratic past. In the world of the play Venice is a man's world, while Belmont is controlled by women.

The Venetian plot has many of the traits of a Shakespearean tragedy. Antonio is melancholic. He takes a loan from Shylock to fund Bassanio's attempt to marry the rich heiress of Belmont, despite the mutual hate between the Christian and the Jew. He haughtily agrees to the malevolent "pound of flesh" bond to both prove his love for Bassanio and his contempt for Shylock. He experiences a series of financial catastrophes, as his argosies are wrecked in different parts of the world. He fails to repay the loan on time and so Shylock obtains the right to execute his bond. The Duke of Venice understands that the law is on the Jew's side and no matter how wrong it may seem to let Shylock exact his pound of flesh, it is infinitely worse to undermine the rule of law,

because what holds together the whole of the Venetian Republic and its ethnically and religiously diverse citizens is the trust in its common legal norms. Therefore, Antonio is doomed. After an unexpected legal twist, however, he is discharged of his obligation and Shylock is punished for his cruelty. The Jew is ruined and humiliated. Even though it formally seems deserved, Shylock's plight feels too brutal and undignified.

Conversely, the Belmontian plot has most of the features of a Shakespearean romantic comedy. It centres around a brilliant young woman, Portia, who is "curbed by the will of a dead father" (I.ii.24). In a typically patriarchal fashion, her father has arranged for a lottery by which her future husband is to be determined – a husband she can neither choose nor refuse. Nevertheless, Portia manages to have her own way and marry the man she wants. She also shows unequivocally to Bassanio that she is not to be underestimated and, as a wife, she won't tolerate to be used or abused in any way. Portia achieves all this by becoming the mastermind of the play. She gives a subtle clue to her chosen suitor as to which casket to choose, perhaps without him even being conscious of it, by means of a song that both thematically suggests that outer appearances often lie, and rhythmically points at the word "lead" – the material of which the casket is made. She also assumes a male identity and resolves the Venetian plot. Under the guise of a "young and learned doctor" (IV.i.146) she intervenes in the court trial and resourcefully reverses its outcome. She also uses the opportunity to teach Bassanio a lesson about the importance of being true to his wife. In her crossdressing venture she is paralleled by her waiting-gentlewoman, Nerissa, while in her emancipation from her father's oppression by Jessica, Shylock's daughter – both of whom also find their husbands by the end of the play. Thus, the romantic plot seems to overpower the tragic one and very reasonably both Francis Meres in his *Palladis Tamia* (1598) and John Heminges and Henry Condell in the *First Folio* (1623) list *The Merchant* among Shakespeare's comedies.

Antisemitism

So, where does the "unpleasantness" come from? The most conspicuous "unpleasant" issue in the play clearly is antisemitism. Even though both as a term and as an ideology antisemitism emerged in the late 19th century, and as we now know led to the Holocaust – the most terrible crime in recorded human history – it had been predated by centuries-long Christian hostility to the Jews. The primary source of this hostility is doctrinal and results from Judaism's rejection of the central Christian claim that Jesus was

the Messiah and Son of God. Consequently, ever since medieval times Jews were presented by the church as "Christ's killers" and became typical victims of oppression in Christian societies. In 1144 a boy, William, was murdered in the English town of Norwich. Although the murder was never solved, the Jewish community was accused of having tortured and killed the boy. Rumours about this case spread across Europe and became the basis for the "blood libel" – a series of fabricated accusations against Jews for allegedly murdering Christian children to take their blood. Conversely, the limited employment opportunities for Jews (together with the doctrinal prohibition for Christians to take usury) led them towards the occupation of moneylending. This was advantageous to medieval rulers, because the weak social position of Jews allowed rulers to abuse them, tax them additionally, channel negative attitudes toward them, and scapegoat them whenever needed. As a result, people's resentment of Jews grew so much that medieval kingdoms had to banish them altogether. They were first expelled from England and forbidden to return on pain of death (1290), then from Germany (1350), France (1394), Spain (1492), Portugal (1497) (Beller, 2007).

By Shakespeare's own time the Jewish population of England had been long gone. There was a small number of Jews, mostly converted to Christianity, living in London. Nevertheless, stories about Jews circulated still: "Jews lured little children into their clutches, murdered them, and took their blood to make bread for Passover. Jews were immensely wealthy—even when they looked like paupers—and covertly pulled the strings of an enormous international network of capital and goods. Jews poisoned wells and were responsible for spreading the bubonic plague. Jews secretly plotted an apocalyptic war against the Christians. Jews had a peculiar stink. Jewish men menstruated" (Greenblatt, 2012). The English dramatist who first infused almost all of these stereotypes into one dramatic character was Christoper Marlowe in his play *The Jew of Malta* (1589). In his antihero, Barabas, Marlowe seems to be trying to stuff all anti-Jewish prejudices all at once. He plots, lies, schemes, bribes, betrays, murders, pushes others to bankruptcy, even poisons his own daughter. The effect is grotesque. A more careful analysis of Marlowe's play would find that he is amplifying the evil features of his antihero, in order to lay bare their implausibility, as well as to expose the equally evil Christian and Muslim characters in the play, but to the less careful eye it would be just a reinforcement of the familiar negative stereotypes.

In 1594 Queen Elizabeth's own physician, Roderigo Lopez, a Portuguese Jew who had converted to Christianity and joined the Church of England, was accused of plotting to poison her. The accusation was based on information that Lopez had accepted payment of a large sum from the Spanish king, Philip II, to do some important service. The queen was unconvinced and delayed the proceedings. When finally the prosecutor indicted the suspect he described him as "a perjured murdering traitor, a Jewish doctor, worse than Judas himself". The purported perfidiousness and greed of the accused made sense – the fact that he was of Jewish origin added credibility to the accusation. He defended himself and protested his innocence, but was eventually found guilty, then hanged, drawn and quartered. Lopez's trial motivated the Lord Admiral's Men to revive Marlowe's *The Jew of Malta*, even though the author had lost his life during the previous year. A few years later Shakespeare's *The Merchant* premiered on the stage (Greenblatt, 2012).

Shakespeare found most of the material for his play in a 14th-century Italian novella which partakes of a *Decameron*-like collection entitled *Il Pecorone* by Giovanni Fiorentino. It tells the story of an impoverished nobleman Giannetto who travels to Venice and borrows money from his godfather Ansaldo to sail three times to Belmonte where he plays a game with a rich and beautiful lady according to which they go to bed and if Giannetto manages to make love to her, she will marry him – if he falls asleep, he will lose everything he has. The lady drugs him every time and he falls asleep, until the third time when an attending lady warns him to avoid drinking the wine he is given. By the time of Giannetto's third voyage Ansaldo has run out of money, so he has borrowed from a moneylending Jew. He has also undertaken the "pound of flesh" bond. The loan becomes overdue and the Jew claims execution. The lady secretly travels to Venice, disguises herself as a lawyer from the University of Bologna, and overturns the trial. Still disguised she manages to obtain from Giannetto a ring he received from his wife for which he is later held accountable before it is finally discovered that the lady and the Bologna lawyer were the same person. Ansaldo marries the attending lady who helped Giannetto.

The figure of the Jew in the novella is stereotypical. It is important for the development of the plot but has no depth of its own. This is not the case in Shakespeare's dramatisation. Clearly inspired by Marlowe's Barabas but also, it seems, by the tragic real-life context of Lopez's trial, he developed a complex villain. Unlike Marlowe who

exaggerated the negative traits of Barabas *ad absurdum*, Shakespeare used a strategy he had already perfected in historical tragedies like *Richard III* – he provides access to the mind of the villain and lets him explain himself the trauma that drives his wicked behaviour. The culmination of this is Shylock's "Hath not a Jew eyes" speech in Act III, scene i. The realisation that Jews and Christians share the same humanity and therefore are equal in dignity casts a new light on Shylock's character and the overall meaning of the play.

Xenophobia and racism

Other "unpleasant" issues are also added by Shakespeare to Giovanni Fiorentino's original story. Today we would call them xenophobia, racism and homoeroticism. The first four (of altogether seven) scenes that take place in Belmont are dedicated to Portia either talking about, or meeting her suitors – a Neapolitan prince, a German Count (Palatine), a French Lord (Monsieur le Bon), a Baron of England (Falconbridge), a Scottish Lord, another German (the Duke of Saxony's nephew), the Prince of Morocco and the Prince of Aragon. She inevitably speaks about them in terms of national stereotypes. This creates serious comic potential – she ridicules the Neapolitan for thinking only about horses, the first German for lacking vigour and a sense of humour, the Frenchman for being too neurotic, the Englishman for not speaking any foreign languages, the Scotsman for being too meek and gullible, the other German for drinking too much, the Moroccan for having "the complexion of a devil", and the Spaniard for being too proud and foolish. On a more sinister note, Shylock is eventually punished under Venetian laws that protect the locals and mandate excessive sanctions for any aliens that misbehave.

Even though English society had started opening up to refugees fleeing the religious wars already under the rule of Henry VIII, there were still outbursts of public discontent against the foreigners even in Shakespeare's own time. There were riots in 1592, 1593 and 1595 in the context of which Shakespeare contributed to a never-performed play *Sir Thomas More*, in which the eponymous character, in the capacity of Sheriff of London, confronts the crowd on "Evil May Day" – a historical xenophobic riot that took place in 1517. One of the two passages authored by Shakespeare is Thomas More's speech in which he makes the rioters imagine what it would feel like if they were to end up in the shoes of the "wretched strangers", in order to demonstrate to them their "mountanish inhumanity" (Pollard, 2010).

Some of these "strangers" were Elizabethans of different skin colour. 16th-century London was inhabited by Persians, Indians, East-Indians and, of course, "negars and blackamoores". The numbers of the latter apparently increased dramatically by 1600 as slaves were freed from captured Spanish ships[1]. In his other Venetian play *The Tragedy of Othello* (1603) Shakespeare confronts the issue of race directly. The psychological destabilisation of the Moor owes, at least in part, to him being a black man climbing up the social ladder in a white men's world and marrying a white woman. In manipulating Othello and turning the other characters against him Iago exploits existing racial prejudices, e.g. by describing Othello as a "black ram" or a "Barbary horse" mating with Brabantio's white daughter to produce monstrous offspring (I.i.94-127). Placing such a character at the centre of one of his great tragedies means that Shakespeare was not indifferent to the problems of race and wanted to show to his contemporaries what it felt like to be abhorred, feared and envied because of your skin colour.

Homoeroticism

Homoeroticism is subtly suggested in *The Merchant*. Antonio is melancholic and seems to harbour a more-than-friendly interest in the much younger Bassanio. According to Solanio, he "only loves the world for him" (II.viii.52). There seems to be a rivalry between Antonio and Portia for Bassanio's attention, which is eventually won by Portia by dressing up as a man and outwitting everyone. Unlike his counterpart Ansaldo in Giovanni Fiorentino's original text Antonio does not marry in the end. The homoerotic sensibilities of the play may have even remained unnoticed were it not for the long list of instances in Shakespeare's works where this theme is explored from various perspectives – e.g. the relationship between the speaker and the "Fair Youth" in the *Sonnets*, Phoebe and Ganymede in *As You Like It*, Orsino and Cesario, Olivia and Cesario, as well as Antonio and Sebastian in *Twelfth Night*.

It is important to note that the terms *homosexuality*, *heterosexuality* and *bisexuality* emerged in the 19th century. Early modern people did not have a need to determine their sexual orientation. The major distinction was between the heterosexual monogamy in marriage for the purposes of procreation, promoted by the Church, and sodomy, i.e. all sorts of diversions from this norm, including extramarital sex, non-

[1] At the turn of the seventeenth century, Queen Elizabeth's Privy Council issued three documents that authorised the removal of "negars and blackamoores" from England.

procreative sex, oral sex, anal sex, mutual masturbation, homosexual sex, group sex, bestiality, etc. Another important idea that can help us understand the notion of sexuality of Shakespeare and his contemporaries, is Platonic love. In simplified terms, it claims that there are different forms of love (eros) – the baser forms are connected with the desire to engender offspring, while the more elevated ones – with the desire to engender wisdom. So, love between two men, typically an older, wiser one and a younger, more beautiful one, can be understood in terms of love. Thus, Platonic love covered a wide range of relationships some of which could be considered homosexual today. Yet another related idea is that of Renaissance philosopher Pico della Mirandola which presents man as a "great miracle" because he is a spiritual intelligentsia endowed with free will. The purpose of free will is for man to choose what form of life he prefers. This idea was later adapted by humanist scholar Juan Luis Vives into his *Fable about Man*, in which man is an actor who can play every part – he can be a plant, animal, man, woman, even a god.

Patriarchalism

However, the most central "unpleasant" issue in *The Merchant* is not xenophobia, racism, homoeroticism, or antisemitism – it is patriarchalism. It runs throughout the whole play and all female characters are confronted with it. Portia must find a way to liberate herself from the oppression of her dead father, but also avoid oppression in her future married life. The first part of her agenda is parallelled by Jessica – a character missing in the original novella – who wants to escape from her status of a Jew's daughter by becoming a Christian's wife. The second part is paralleled by Nerrissa who, just like Portia, wants to make sure that her husband will not underestimate her and will treat her respectfully. The importance of completing the two phases of this process is stressed comically by the story of the clown, Lancelot Gobbo, who musters courage to change his worse master for a better one – but still remains a servant, and escapes from the devilish Jew – only to land on a black Moorish wife.

Like antisemitism, patriarchalism also has its origin in the Christian doctrine. The Book of Genesis gives two reasons for the subjection of women. First, woman was created for man, of his own flesh, not the other way around (Genesis 2:18-25). Second, woman was guiltier than man in committing the original sin, so she was punished to be ruled over by him (Genesis 3:16). These reasons were still used to determine the political, economic and social status of women at the time of Shakespeare. This is clearly demonstrated in a legal

compendium *The Law's Resolutions of Women's Rights* published in 1632 but apparently composed during Elizabeth's reign. The comprehensive description of a woman's legal status uses these biblical reasons to explain why "women have no voice in parliament, they make no laws, they consent to none, they abrogate none. All of them are understood either married or to be married and their desires are subject to their husband". Girls were effectively barred from grammar school and university education even if their social and economic status allowed for it. They were considered intellectually less capable and therefore unsuitable for humanist education. Instead, those of them who received training would master practical skills that would make them better in their roles inside the family as wives, mothers and mistresses of households. When women married their legal personality would be merged into that of their husbands. By law a married woman could neither enter into contracts, nor sue independently of her husband (Kaplan, 2016).

The historical situation of women was clearly at odds with the example of the monarch, a woman who eventually decided not to marry and have children. It was also in contradiction with the idealisation of women in the amorous culture that pervaded not only private, but also public life. In this context Shakespeare confronted this issue in one of his earliest plays, *The Taming of the Shrew*, and continued exploring it throughout his career. While the histories and tragedies are centred around masculine heroes, the comedies are dominated by women (Bamber, 1982). It is sufficient to think of Beatrice in *Much Ado About Nothing*, Rosalind in *As You Like It*, Viola in *Twelfth Night* and Helena in *All's Well that Ends Well* in order to make out the consistent message conveyed in these plays. Women are certainly not inferior to men. In terms of courage and intellect they sometimes surpass them. Hence, keeping women in subordination is groundless and therefore wrong.

Shakespeare even seems to have a favourite dramatic device to demonstrate this on the stage – cross-dressing. At a crucial moment in the plot a woman would dress as a man, assuming thus male privileges, e.g. the possibility to travel freely, to be treated equally, to speak from a position of authority, and thus would solve an apparently unsolvable problem. Interestingly, this motif is present in Giovanni Fiorentino's novella which was used as the source for *The Merchant*. And in the chronology of Shakespeare plays it is most probably the earliest instance of its use. Shakespeare apparently found the device dramatically useful because he immediately extended its use. In *The Merchant*

all women dress as men at some point – Jessica to escape from her father, while Portia and Nerrissa to help their husbands and to assert their status.

Of course, cross-dressing provided additional comic potential due to the fact that female parts in Elizabethan and Jacobean theatre were typically performed by young men. Later in *As You Like It* Shakespeare tested the limits of the device by having a boy actor play a woman, Rosalind, who pretends to be a male character, Ganymede, who pretends to be Rosalind. In *Twelfth Night* Orsino and Olivia both fall in love with Viola while she is pretending to be a man, Cesario, and the love triangle is only solved when her identical twin-brother Sebastian arrives, who is in turn fancied by Antonio. Besides the potential for humorous twists and homoerotic jokes, cross-dressing opposed the dogmatic nature of gender roles, and by extension that of other similarly social conventions, to the universality of the human essence, and highlighted the freedom of the human being to fashion his or her own self in the world.

From the point of view of performance history, *The Merchant* enjoyed lasting popularity both in England and outside of it. The figure of Shylock quickly asserted itself as the central concern of the play. A major influence on 19th-century productions was that of Henry Irving which premiered in 1879 in London. It was respectful to Shakespeare's text, tried to be historically accurate in terms of setting and costume, upheld Victorian values and stereotypes, and most importantly focused on Shylock who was presented as a complex tragic figure that captured the imagination of the audience and elicited their sympathy. The modernist alternative to Irvin's approach was to foreground the comic plot of the play and present Shylock as a stereotypically grotesque Jew. An extreme version of this approach, featuring a completely dehumanised version of Shakespeare's character, was used as antisemitic propaganda by the Nazi regime in Germany in the 1930s. After the end of the Second World War, when the whole of humanity became aware of the monstrous crime of the Holocaust, the question of how to portray Shylock in *The Merchant* became understandably sensitive. As a result, the comic dimension of the play was often suppressed in post-Holocaust stagings. A noteworthy production that managed to restore the balance between the two generically dissimilar plots and all the "unpleasant" issues of the play was that of Trevor Nunn for the National Theatre in London in 1999. A variety of other productions reflected other specific political anxieties, e.g. why did Russia's post-communist transition go wrong (Robert Sturua's production

that premiered in 2000) or the global financial crisis and its implications for social injustice (Daniel Sullivan's production that premiered in 2010) (Sokolova, 2014).

Javor Gardev's recent Bulgarian production

In May 2024 a new production of *The Merchant of Venice* premiered at the National Theatre in Sofia. It was directed by one of the foremost Bulgarian theatre directors – Javor Gardev. A graduate of the renowned National Classical Lyceum, holding university degrees in theatre directing but also in philosophy, Gardev quickly established himself as a highly intellectual theatre-maker both at home and abroad. With his long list of achievements and accolades his work inevitably receives a lot of attention from theatregoers and is influential on fellow artists. Over the years, Gardev has demonstrated a taste for Shakespeare and especially in Shakespearean super-productions. In 2006 he rocked the stage of the National Theatre with his bold, high-octane production of *King Lear*. In 2012 he put on the same stage the most ambitious *Hamlet* that Bulgarian audiences had seen in a long while.

In his *Hamlet* Gardev used for the first time in the theatre the new Bulgarian translation of Shakespeare's best-known drama made by Alexander Shurbanov – distinguished academic and accomplished poet himself. This year's production of *The Merchant* again presented a new Bulgarian translation by Shurbanov which was published simultaneously with the premiere. It uses easily accessible, contemporary Bulgarian language, but at the same time recreates with the highest level of scholarly precision both the complex meaning and the poetic rhythm of Shakespeare's original. The academic team consulting Gardev increased including also London-based Shakespeare scholar Boika Sokolova who has written extensively about *The Merchant*.

Gardev's new production clearly lived up to the expectations created by the previous ones. It gave the audience the theatrical event of the year. It brought together an excellent team of actors – both upstart and well-established ones. It presented respectfully Shakespeare's text in its graceful new translation. It was lively and dynamic, visually impressive, musically stirring, linguistically polyphonic, well-advertised. As a reviewer observed, on the opening night it grabbed the audience, half-the intellectual elite of the country, by the throat and ruthlessly conquered it. Paradoxically, Gardev did not achieve this by pleasing them, but by forcing them to acclaim something that was unpleasant (Kambourov, 2014).

In his directorial concept included in the playbill Gardev focuses on the notion of "hot temper" (I.ii.18) which he interprets as a metaphor for inexorable primordial passions or tensions that precede ideology and rationalisation. These passions, claims Gardev, account for intuitive attraction or repulsion between people, which results in conflicts that cannot be explained in doctrinal, ethnical or gender terms. The passions and the emotions resulting from them are subsequently rationalised and arranged in logically coherent narratives. These narratives, however, do not help individuals control their passions, but rather group them in ideological camps where they channel their shared passions to further antagonise them. Therefore, concludes Gardev, ideological rationalisations are no remedy for the eruption of these passions. The memory of past wars is no guarantee for the preservation of peace. Those who study the Night of Broken Glass, in order to learn from history, may be exactly the ones who will incite future pogroms.

Following this agenda Gardev reached far beyond the limits of the usual "unpleasantness" of *The Merchant*. The Venetian men – Antonio, Solanio, Salarino, Bassanio, Gratiano and Lorenzo – were presented as unpleasant. They were young, arrogant, bad-mannered, foul-mouthed, bored, focused on ways to make easy money and spend it on entertainment. Antonio seemed frustrated and angry rather than melancholic. Solanio and Salarino demonstrated freakish identities of skinheads who were secretly drag-queens. There was an overall sense of toxic masculinity, and a kind of male bonding based on it. The women of Belmont – Portia and Nerissa – looked needy, neurotic and hysterical. There was a hint of a homosexuality between them as well. It also looked like Nerissa manipulated Portia into choosing Bassanio to be her husband, because she was secretly in love with Gratiano, and then sent via Gratiano instructions to Bassanio about which casket to choose. Against this background the most likeable character unexpectedly was Shylock. This was the case, even though Samuel Finzi – the production's brilliant Bulgarian-German guest star of Bulgarian-Jewish descent – delivered a very careful and balanced performance. His Shylock was neither a wronged romantic hero, nor a cartoon villain. Jessica acted like an angry teenager – she spoke little but slapped everyone who came within her range.

A central accent of Gardev's production, which was added to Shakespeare's play, was the theme of multilingualism. Each of Portia's unsuccessful suitors, who have no cues

in the original text, addressed her on video and recited to her a love sonnet in his own language – Italian, Latin, French, English, Scottish English and German – to which she responded in the respective language. Later when the Princes of Morocco and Arragon arrived, they also spoke in Arabic and Spanish. In private, Shylock and Jessica spoke in Ladino – an old variety of Spanish spoken by Sephardic Jews. No doubt, this directorial decision required significant efforts on the part of the actors to learn their cues in all the languages and also learn how to pronounce them. Linguists and native speakers were recruited as consultants. On the surface, it seems that the purpose of all this is to demonstrate globalization and how we are all made up of different linguistic and cultural layers. In the context of the directorial concept and the particular "unpleasantness" of Gardev's production, however, there may be a more sinister message. The fear and hatred for the Other may not be a result of communication failure or lack of sufficient knowledge. Portia and Shylock on the stage seem very proficient in others' languages – but they still hate them.

Another major departure from Shakespeare's play was the removal of the cross-dressing device from the court hearing scene. Instead of disguising themselves as men and intervening personally in Antonio's trial, Portia and Nerissa sent two actual men, the servant Balthasar and the jurist Bellario, to do the job for them. This contributed to the already suggested impression that Portia may be rich, but she is not very smart or capable herself, and completely derailed the feminist theme from Shakespeare's original play. In the final scene when it became clear that Bassanio and Gratiano had broken their promises to their wives and had given away their rings – Portia threw a pitiful tantrum and seemingly in an act of self-punishment started throwing around the stage heavy money bags piled there during the trail scene. Bassanio understood that he would have to choose between Antonio and Portia, punched his Venetian friend, pushed him off the stage, and ended up in an uneasy embrace with his new wife.

By the end, even though nobody died, it had become crystal clear that Gardev's version of *The Merchant* was not a comedy. It was not a tragedy in the formal sense either. It was tragic in a deeper sense. It conveyed the message that human strife and inequality are unsurmountable, that Christians will always humiliate Jews and Jews will always try to avenge themselves – of course, this is just a metaphor for the relationship between any given religious, ethnic, national or other groups, that men and women will be forever

locked in a battle for supremacy and whoever prevails will inevitably oppress the loser. Hence, Western ideals, such as freedom, equality, human rights, rule of law, seem to be unattainable illusions. From this vantage point, Portia's beautiful speech about "the quality of mercy" (IV.i.190-211), which was repeated several times during the production, sounded like a piece of utopian nonsense – since in fact no one on the stage showed any intention to practise what it preached.

Thus, Gardev's production clearly mirrors crucial negative features of the reality we live in. After a decade of end-of-history optimism following the fall of the Berlin Wall during which we all thought that the Cold War was over and Western democracies had prevailed, we have witnessed a gradual backsliding in the support for democracy, classical liberalism and human rights. There were some genuine disappointments, such as the global war on terrorism or the global financial crisis of 2007-8, but after Russia's annexation of Crimea in 2014 and definitively after Brexit and the election of Donald J. Trump as the 45th president of the United States in 2016 no one anymore doubted that there was a "new" Cold War. All this exacerbated after February 2022 and Russia's unprecedented military aggression against neighbouring Ukraine. What possibly only citizens of countries from the former Soviet Bloc understood was that the "new" Cold War was actually the old Cold War, it simply never ceased. Those who knew how to abuse communism quickly learned how to abuse capitalism and the democratic state as well. An economic system that values the accumulation of capital is naturally susceptible to corruption, while a political model based on free speech – to disinformation.

The innovation that changed the rules of the game, however, was the invention of social media and their underlying algorithms for distributing content almost instantaneously on an unprecedented scale. Originally, these algorithms were designed to attract people, harvest and process the data they produced, and target them more adequately with advertisements of goods and services they are likely to buy. Soon, it was discovered that the same algorithms reward hate speech online and are ideal for targeting people with disinformation they are likely to believe. This discovery was quickly weaponized by Russia and its allies in the "new" Cold War in a persistent attempt to undermine citizens' belief in the value of democracy, classical liberalism and human rights and so destabilise the countries that promote them. A major strategy is identifying existing cleavages in Western societies and exploiting them by flooding social media with

disinformation narratives that contradict internationally acknowledged principles, the position of the government, the authorities, the judiciary, the academic community, etc (Maci, 2024). In a multi-ethnic and multi-religious society disinformation will try to stir up ethnic and religious conflict; in case of a refugee crisis, it will incite xenophobia and racism; it will take advantage of inherent homophobia to spread fear of a secret plan to brainwash children to make them all gay.

Interestingly, the cleavage between men and women also partakes of this story. Over the years the feminist movement has gained significant ground, mainly in Western countries, in countering discrimination, right to vote, to hold public office, to equal employment, to own property, to enter into legal contracts, to free movement, to education, to health, reproductive rights, freedom of violence, etc. In recent decades, however, feminism has suffered a backlash, which has intensified in correlation with the onslaught against democracy and human rights. This backlash has taken many interrelated forms. The most direct one is violence against women[2]. There is also a rise in anti-abortion action on a global scale[3]. In some places there is opposition to sexual and reproductive health education. Yet another form of anti-feminism, spreading like wildfire on social media, is toxic masculinity. Ranging from the pseudo-academic YouTube talks of Jordan Peterson to the scandalously misogynistic TikTok ramblings of Andrew Tate its proponents assert the "natural" inequality between men and women, and preach to return to "traditional", i.e. patriarchal, family values where women are "tradwives", "homemakers" and should "sacrifice" themselves in the name of procreation. Naturally, these controversies are gladly amplified by Russian disinformation, where Vladimir Putin is banning the "child-free ideology" and thinking to restore the Soviet tax on childlessness.

In Bulgaria all these factors combine to create the perfect storm. After 35 years of unsteady and troublesome efforts to integrate with Europe and the West, the country is now on the brink of drifting back into the orbit of Russian influence. Even though after the collapse of Communism Bulgaria was formally re-established as a democracy, ex-communists and their successors retained powerful positions in the political, corporate

[2] EU survey on gender-based violence against women and other forms of interpersonal violence. Eurostat. European Union, 2022.
[3] An Unstoppable Movement: A Global Call to Recognize and Protect Those Who Defend the Right to Abortion. Amnesty International, 2023.

and criminal sectors, and thus perpetuated their control over the state and its institutions. The result was unbridled, long-term embezzlement of national and European funds and pushing the country closer and closer to Russia. The efforts of democratically minded citizens and their political representatives have achieved important goals like Bulgaria's membership in NATO and the European Union, but have not managed to liberate the state from what has taken the shape of systemic corruption pervading all spheres of life. Of course, the captors of the Bulgarian state have spared no means to discredit the authentically democratic forces. After the advent of social media and disinformation it has become infinitely easier to distract people, exploit their biases, turn them against each other and generally away from responsible political mobilisation. Now, what crystallises amidst the strange hotchpotch of apathy and aggressive rows on "unpleasant" issues is a worrisome fantasy for "strong-hand" government.

In this context, it is hard to tell whether Gardev's production of *The Merchant* is influenced by negative social trends or tries to expose them. After all, it broods over the "natural" character of inequality, toys with toxic masculinity, and suppresses the feminist plot. Just like the tragic actual history of Jews has put pressure on directors to be careful with the "unpleasant" issue of antisemitism, the current actual threat on democracy, human rights, and in particular women's rights, both globally and locally, should compel them to be careful also with the other "unpleasant" issues. In Bulgaria the threat is so immediate that everyone, who is aware of this, cannot but take a clear stand. The 400-year-old solution proposed by Shakespeare in *The Merchant* is simple but appealing. All forms of inequality are essentially similar. If we honestly accept the idea of our underlying shared humanity, we can overcome the most fundamental of them – the inequality between men and women. If we manage to do this, we can deal in the same way with all the rest.

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ONLINE TEACHING AND LEARNING: NEW DIMENSIONS

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Abstract

The article focuses on the variables of foreign language teaching and learning online vis-à-vis traditional classroom methods. Aspects to be discussed range from the subjective factors for both students and tutors that can be motivating (mobile access, swift feedback, automated marking, individual tasks, etc.) or demotivating (technical glitches, lack of technical support, extra work for lecturers, etc.), to objective factors that facilitate online learning in general (increase in student attendance, fast internet, the 'digital natives' generation, among others). Some synchronous, asynchronous and hybrid language learning online platforms will be highlighted with an emphasis on the different possibilities that they present and the weighing of their advantages and drawbacks. This essay will also touch upon the emergence of online education, examining its key drivers, advantages, challenges, and the implications for the future of learning.

Keywords: online education, motivating factor, demotivating factor, online learning platform

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A brief overview of online education

In recent years, online education has revolutionized the way we perceive and engage with learning. This transformative shift from traditional classroom settings to digital platforms has been driven by advancements in technology, changing societal needs, and a growing recognition of the benefits that online education offers. The dawn of online teaching demonstrated a significant new stage in the history of education. The roots of online education can be traced back to the late 19th and early 20th centuries with the start of correspondence courses. Universities like the University of Chicago and the University of London began offering courses through mail, allowing students to study remotely. These early distance learning programs laid the groundwork for future developments by demonstrating the feasibility of education beyond the traditional classroom.

The mid-20th century saw the introduction of televised courses, which represented the next step in distance education. In the 1950s and 1960s, some higher education institutions, for instance Stanford University and the University of Wisconsin, used television to broadcast lectures to a wider audience. This approach expanded access to education but was to a large extent limited by the one-way nature of the medium. The 1980s marked the beginning of computer-based learning. The development of personal computers and early networking technologies enabled universities to experiment with computer-assisted instruction. In this vein, the University of Illinois at Urbana-Champaign launched the PLATO (Programmed Logic for Automated Teaching Operations) system, which was one of the first generalized computer-assisted instruction systems. PLATO provided a platform for interactive learning and set the stage for future online educational innovations.

The advent of the Internet in the 1990s revolutionized online education. The ability to connect computers globally opened new possibilities for remote learning. Universities began to explore web-based courses, which allowed for greater interactivity and flexibility compared to previous methods. In 1993, the University of Phoenix became one of the first institutions to offer fully online degree programs. This move demonstrated the potential of the Internet to provide comprehensive education entirely online. By the late 1990s, many universities, including prominent institutions like MIT and Stanford, began to offer online courses and degrees.

The early 21st century saw the rise of Massive Open Online Courses (MOOCs), which further transformed online education. MOOCs offered free, high-quality courses to anyone with an Internet connection, democratizing access to education on an unprecedented scale. In 2012, platforms like Coursera, edX, and Udacity were launched by prestigious universities, including Harvard, MIT, and Stanford, making courses from these institutions accessible to millions of learners worldwide. MOOCs introduced new pedagogical approaches, such as video lectures, interactive quizzes, and peer assessments. They also fostered a global learning community, allowing students from diverse backgrounds to collaborate and learn together. While the initial hype around MOOCs has tempered, they have left a lasting impact on the online education landscape and have been integrated into various hybrid learning models.

The late 2010s and early 2020s witnessed the mainstream adoption of online education by universities worldwide. Advances in technology, such as high-speed internet, cloud computing, and mobile devices, made online learning more accessible and effective. Universities increasingly incorporated online components into their curricula, offering blended and fully online programs. The COVID-19 pandemic in 2020 accelerated the adoption of online education. With campuses closed and in-person classes suspended, universities had to pivot to online learning almost overnight. This global shift highlighted the importance of digital literacy and the need for robust online learning infrastructure. While the transition was challenging, it also demonstrated the resilience and adaptability of higher education institutions.

Several factors have contributed to the rise of online education. First and foremost, technological advancements have played a crucial role. The proliferation of mobile devices, and sophisticated e-learning platforms has made it easier than ever to access educational content from anywhere in the world. These technologies have not only improved the accessibility of education but also its quality, with interactive and multimedia-rich content enhancing the learning experience. Another significant driver is the increasing demand for flexible learning options. In today's fast-paced world, many individuals seek educational opportunities that fit their busy schedules. Online education provides the flexibility to learn at one's own pace and convenience, making it an attractive option for working professionals, parents, and anyone looking to balance their studies with other commitments.

Online Education: Motivating and Demotivating Factors for Students and for Faculty Members

The full or partial shift to online education in universities has introduced a range of motivating and demotivating factors for both students and faculty. Understanding these factors is crucial to creating an effective and engaging online learning environment. There has been an extensive body of research that has found online teaching and learning effective in a number of ways (cf. Benta et al. 2014, Hakim 2020, Filipova & Yuleva-Chuchulayna, 2022).

One of the most significant motivating factors for students is the **flexibility and convenience** that online education offers. Students have the possibility of mobile access and retrieve course materials and complete assignments at their own pace in accordance with their own schedule. They can also receive swift or instant feedback on the tasks they have completed, e.g. quizzes, assignments, and assessments, helping them understand their progress and areas for improvement. This flexibility is particularly beneficial for students balancing their studies with work, family responsibilities, or other commitments.

Online education platforms provide **access to resources** of a wide array, including recorded video lectures, interactive simulations, and digital libraries which enhance the learning experience. This abundance of resources allows students to explore topics in greater depth at their own pace, enhancing their learning experience. Students from remote areas can access quality education without the need to relocate. This democratization of education ensures that learning opportunities are not confined by geographical boundaries. At the same time studying online reduces the consumption of resources and decreases costs, which is considered a beneficial aspect of online education (Joosten et al., 2021; Pelletier et al., 2021; Watermeyer et al., 2020).

Studying online also offers a more convenient mode for introverted students who might feel shy or uncomfortable in an open classroom. Therefore, learning from home can create a more comfortable and stress-free environment for students. This comfort can reduce anxiety related to classroom dynamics and increase focus and productivity. A study of the impact of online learning and assessment on student well-being found that "for some students, pedagogical unfamiliarity, extended timings of assessments and availability of resources have significantly increased the task demands", requiring a greater cognitive effort, while others felt that spending more time on university tasks increased their well-

being (Slack & Priestley 2023: 346). Therefore, the fact that there was no considerable correlation between well-being and online assessment could be explained by the diverse approaches at separate higher education institutions.

Online platforms often incorporate adaptive learning technologies that tailor educational content to individual student needs. This **personalized approach** can help students master difficult concepts more effectively and feel more engaged in their learning. Such forms of teaching can provide immediate feedback to students and result in better achievements, enhancing student autonomy (Lee et al., 2011; Wandler & Imbriale, 2017; Martin & Bolliger, 2022).

Despite its numerous benefits, online education presents several challenges. One of the primary issues is the **digital divide,** which refers to the gap between individuals who have access to modern information and communication technology and those who do not**.** Not all students have reliable access to high-speed internet or the necessary technological devices, thus students from economically disadvantaged backgrounds can be prevented from participating fully in online learning. This disparity exacerbates existing educational inequalities.

Also, **technical problems**, such as software glitches, platform outages, and user errors, can disrupt the learning process. Not all students are technologically adept: some may face difficulties in navigating online platforms, leading to frustration and a decrease in the overall effectiveness of the educational experience. A demotivating factor for some can also be the strict deadline that is imposed on uploading certain tasks, possible technical errors in a test, or incorrect automated marking, among others.

Another challenge is the **lack of face-to-face interaction**, which can affect the learning experience. Maintaining student engagement and fostering interaction in a virtual environment can be challenging. Unlike physical classrooms, online platforms may struggle to replicate the social dynamics and immediate feedback mechanisms that facilitate active learning. The lack of face-to-face interaction can lead to feelings of isolation and disengagement among students.

Online learning requires a high degree of **self-discipline** and effective time management skills. Students who struggle with these skills may find it challenging to keep up with coursework and meet deadlines, leading to frustration and decreased motivation.

For lecturers, embracing online education offers numerous motivating factors that enhance teaching effectiveness, broaden their reach, and provide flexibility. Some of the motivating factors for faculty at higher educational institutions coincide with those for students, such as **accessibility and reach**. Online education allows lecturers to transcend geographical boundaries, offering their expertise to a global audience. This expanded reach benefits both lecturers and students in several ways. For instance, online platforms attract a diverse group of students from different cultural, geographical, and socioeconomic backgrounds. This diversity enriches the learning experience and fosters a more inclusive educational environment.

The **flexibility** and convenience of online education are significant motivating factors for faculty. Traditional classroom settings often impose rigid schedules and physical constraints that can limit both teaching and learning experiences. Online education offers several advantages in this regard: flexible scheduling, remote teaching and resource management. That means that faculty can accommodate their schedules to balance teaching with research, administrative duties, and personal commitments; online education eliminates the need for physical presence, enabling lecturers to teach from anywhere, especially those with personal or professional obligations that require frequent travel or relocation. Also, online platforms streamline administrative tasks such as grading, attendance tracking, and content distribution, freeing up time for lecturers to focus on teaching and interacting with students. Therefore, similar to students, faculty benefit from the flexibility of online education. The ability to record lectures and conduct virtual office hours provides instructors with greater control over their schedules, allowing for a better work-life balance.

Online platforms offer a variety of **innovative teaching tools** that can enhance teaching, such as multimedia presentations, interactive quizzes, and discussion forums. The possibility of constantly uploading additional resources and upgrading materials can make teaching more dynamic and engaging, which can be highly motivating for faculty.

Adaptive learning technologies enable lecturers to tailor content to individual student needs, providing individual feedback and support. This **personalized approach** can improve student outcomes and satisfaction. The design of courses can be geared towards catering to diverse learning styles and needs, setting individual tasks, using

various multimedia tools to create engaging and interactive content. In addition, the possibility exists for monitoring students' behaviour, so that is an added bonus for faculty.

While online education offers numerous advantages, there are several factors that can discourage lecturers from adopting this mode of teaching. These factors range from technical challenges and increased workload to concerns about the effectiveness of online education and general resistance to change.

Some of the demotivating factors for faculty overlap with those for students. One of the primary demotivating factors for lecturers is the **technological barriers** associated with online education. The transition to digital teaching requires proficiency with various tools and platforms, which can be daunting for some educators. Faculty may face technical challenges when teaching online. Issues such as software glitches, platform limitations, and lack of technical support can be frustrating and time-consuming. Not all lecturers are comfortable with the technology required for online teaching. The need to master new software, troubleshoot technical issues, and adapt to different digital tools can be overwhelming, especially for those with limited technical skills.

The availability of **technical support** can significantly impact a lecturer's willingness to engage in online teaching. Insufficient support can lead to frustration and demotivation, especially when technical issues disrupt the teaching process.

The **absence of personal interaction** in online education is another major demotivating factor. Traditional classroom settings offer direct, face-to-face engagement, which many lecturers value. Face-to-face teaching allows lecturers to use non-verbal cues to gauge student understanding and engagement. In an online environment, the absence of these cues can make it challenging to adjust teaching strategies in real-time. Personal interactions foster a sense of community and connection between lecturers and students, so building relationships between students and faculty is more difficult in a virtual setting. Lecturers may feel that they cannot provide the same level of support and guidance to their students online as they can in person.

Online education often demands a significant increase in workload compared to traditional face-to-face teaching. This increased burden can demotivate lecturers in several ways. Developing an online course requires substantial **time and effort**. Lecturers must create digital content, design interactive activities, and adapt materials for an online

format, which can be more time-consuming than preparing for traditional classes. Providing timely feedback and grading assignments in an online environment can be more challenging. The need to use digital tools for assessments and monitor student progress adds to the workload.

In addition, online courses often necessitate **constant engagement** with students through discussion boards, emails, and virtual office hours. This continuous interaction can lead to burnout and stress, particularly when managing large classes.

A more common than not concern is the **efficacy of online education,** and it can also dishearten lecturers from adopting this teaching mode. These doubts may stem from various factors, such as the perception that online education cannot match the quality of face-to-face instruction with regards to the depth of learning, the effectiveness of virtual interactions, and the ability to assess student understanding. Another aspect is that maintaining student engagement in an online environment can be challenging. Faculty may worry about the lack of face-to-face interaction, which can make it difficult to gauge student interest and participation.

Resistance to change is a natural human tendency that can demotivate lecturers from adopting online education. This resistance can find manifestation in various forms. Many faculty members are accustomed to traditional teaching methods and may be reluctant to change their established routines and practices. The perceived complexity and unfamiliarity of online teaching can exacerbate this resistance. Also, the culture of an educational institution can influence lecturers' willingness to embrace online education. In institutions where online teaching is not prioritized or supported, lecturers may feel less motivated to adopt it. Thirdly, some lecturers may question the long-term value and sustainability of online education. If they perceive online teaching as a temporary trend rather than a viable and enduring mode of education, they may be less inclined to invest time and effort in it.

And last but not least, ensuring **academic integrity** in online assessments is a significant concern for faculty. The potential for cheating and plagiarism can undermine the credibility of online education and discourage lecturers from fully embracing it. Ensuring academic integrity in an online environment is challenging and can be a source of stress for faculty. The need to implement and monitor proctoring solutions, coupled with concerns about cheating and plagiarism, can detract from the teaching experience.

A recent study (Aikina & Bolsunovskaya, 2020) of attitudes of lecturers towards online education found that what they considered as the most motivating factors were automatic checking of tests, the possibility to post information for students and upload additional materials, set individual or group tasks depending on the objectives and class dynamics and monitor student behaviour. What they found demotivating was the additional work required of faculty, actual and potential technical problems, and plagiarism.

Another study, in which 249 respondents took part, all of whom university lecturers from two medical universities in Bulgaria, concluded that the drawbacks of online training were weakening of the link between faculty and students, diminishing student responsibility in class, and turning students into more passive participants in the process. The benefits of online study were better appreciated by faculty with higher academic rank – associate professors and full professors, as well as by lecturers who were involved in theoretical subjects, compared to those who were in clinical and preclinical departments (Tarnovska et al., 2022).

When evaluating university online education, **objective factors** are also essential for ensuring a smooth and felicitous process of learning. One of the effects of online classes is an increase in student attendance due to the ease of access and the lack of geographical location restraints for participation in lectures and seminars. Another objective factor to be taken into account is that students are digital natives – most young people feel at home using digital technologies in their studies and that fact is positively exploited. Online teaching and learning allow for faster students to not be held back by slower students since everyone can work at their own pace. Lecturers are more disciplined as well, because their participation in a particular course can be tracked. And to add an important ingredient to the mix: the fast internet that makes all of the above possible.

Despite the numerous advantages of online university education, a significant drawback persists: the lack of social contact and the diminished sense of academic community. These issues have profound implications on students' educational experiences and outcomes, affecting their emotional well-being, academic success, and professional development.

Social contact plays a critical role in the educational process. Traditional in-person education provides students with numerous opportunities to interact with peers, engage in discussions, and build relationships. These interactions are crucial because they

provide emotional support, which can be vital for students facing the stress and challenges of academic life. Collaborative learning activities such as group activities and collaborative projects enhance learning by allowing students to share perspectives and knowledge. In addition, building a network of peers and professors is invaluable for future career opportunities and professional growth.

Online education, however, often lacks the spontaneous interactions that occur in physical classrooms and campus social spaces. Virtual classrooms and discussion forums do not fully replicate the immediacy and depth of face-to-face conversations, leading to a sense of isolation among students.

An academic community fosters a sense of belonging and shared purpose among students and faculty and this community is characterized by regular interactions with professors and academic advisors who guide students through their educational journey; participation in academic events, seminars, and extracurricular activities that stimulate intellectual curiosity and growth; the development of a strong affiliation with the university's culture and traditions.

In online education, the absence of a physical campus can undermine these elements. The lack of informal interactions with faculty and peers can make it difficult for students to feel connected to their institution. Additionally, virtual participation in academic events often lacks the engagement and immersion that in-person attendance provides.

To address these challenges, online education providers must proactively foster social interaction and community building. Some strategies can be the use of advanced communication tools and platforms to facilitate more engaging and interactive virtual meetings and discussions; combining online and in-person learning experiences to provide the benefits of both modalities; organizing virtual social events, study groups, and clubs to encourage interaction among students and providing robust academic and emotional support services, including virtual office hours, counseling, and mentorship programs.

While online university education offers flexibility and access to a broader range of students, the lack of social contact and academic community presents significant challenges. Addressing these issues requires innovative approaches to create a more

interactive and supportive online learning environment. By enhancing virtual interactions, promoting community-building activities, and offering strong support systems, online education can strive to provide a more holistic and fulfilling educational experience. After all, "online active learning practices and an online learning climate that fosters peer communication and collaboration are course elements over which instructors can provide much influence" (Cole et al., 2021, p. 878).

The modes of online learning can be broadly categorized into three forms: synchronous, asynchronous, and hybrid. Each of these forms has distinct characteristics, advantages, and challenges, catering to different learning needs and preferences. Synchronous online learning involves real-time interactions between instructors and students. Classes are conducted through live video conferencing tools such as Zoom, Microsoft Teams, Google Meet, Big Blue Button. This mode closely mirrors traditional classroom settings but in a virtual environment. One of the advantages is real-time interaction since students can participate and receive immediate feedback, facilitating dynamic discussions and active learning. There is knowledge sharing in real time and immediate access to the lecturer with the possibility to ask questions and get answers. However, students in different time zones or with other commitments may find it challenging to attend live sessions. Also, dependence on stable internet connections and functional devices can pose problems. The fixed schedule may not suit all learners, particularly those with varying availability.

Asynchronous online learning allows students to access course materials and complete assignments at their own pace. This mode uses platforms such as Moodle, Blackboard, Canvas, Langblog, Tandem where lectures, readings, and assessments are uploaded. When studying asynchronously, students can learn at their own pace, making it ideal for those with busy schedules or who need to balance education with other responsibilities. Course materials are always available, accommodating learners from different time zones and with varying availabilities, therefore students can spend more time on challenging topics and less on familiar ones, personalizing their learning experience. An important aspect of the learning process - shyness and fear of the lecturer is reduced and some students feel more comfortable. Since student reaction is not spontaneous and their reply is pushed back in time, they can apply critical thinking more. The challenge that might arise with these types of platforms is that the learning process

can be hindered by deferred responses to questions and delayed feedback. Also, as mentioned above, strong self-motivation and time-management skills are needed so that students stay on track without regular class meetings.

Hybrid, or blended learning, combines elements of both synchronous and asynchronous learning. It offers a balanced approach by integrating live sessions with self-paced study and tries to remedy some of the challenges posed by the above two forms of study. Hybrid learning offers a balanced approach combining the flexibility of asynchronous learning with the engagement of synchronous sessions. It provides a variety of ways of interaction and learning, catering to diverse learning styles and preferences and offers the structured environment of live classes and the flexibility of accessing materials at any time. Some researchers have advocated the use of blended learning. For instance, Amiti (2020) has indicated that although there can be preferences for either synchronous or asynchronous learning, if both methods are merged this can lead to more felicitous results.

Hybrid teaching and learning does not come without its challenges, however. It requires more complex planning, demanding careful coordination of synchronous and asynchronous components. It may need more resources and support from both faculty and students to manage the different modes effectively and students may struggle to keep track of live sessions and self-paced assignments, leading to confusion and missed deadlines.

The three primary forms of online learning—synchronous, asynchronous, and hybrid—each offer unique benefits and challenges. Synchronous learning fosters real-time interaction and a sense of community, while asynchronous learning provides unparalleled flexibility and accessibility. Hybrid learning aims to blend the strengths of both, offering a balanced and versatile educational experience. The choice of mode depends on individual learner needs, course objectives, and the resources available. As technology continues to evolve, these forms of online learning will likely become even more refined and tailored, ensuring that education remains adaptable and inclusive for all.

The pedagogical benefits of online learning are quite clear and agreed upon by many authors: they provide innovative teaching methods, offer interactivity, heighten motivation and create an environment for student autonomy. At the same time, it offers the opportunity to further develop and practice all language skills, assuring access to

different language situations, and different uses of the language and thus leading to development of communicative skills.

The development of online learning and teaching has transformed education, offering new opportunities and challenges. Technological advancements and pedagogical innovations have paved the way for more accessible, flexible, and personalized learning experiences. As we move forward, addressing the challenges and leveraging the benefits will be crucial in realizing the full potential of online education. The future of learning is undoubtedly digital, and it promises to be more inclusive and dynamic than ever before.

Despite initial scepticism and resistance, online teaching has proven to be a transformative force, reshaping the educational landscape and paving the way for future developments in digital learning. As technology continues to evolve, online teaching will undoubtedly play an increasingly vital role in providing quality education to learners around the world. And the flexibility and learning possibilities are likely to shift the expectations of students and educators, diminishing further the line between classroom-based instruction and virtual learning.

Higher educational institutions experienced a swift global transition from traditional to online studies. Elaborating long-term online learning strategies is a crucial aspect that universities need to tackle in order to provide good quality education (Johnson et al., 2020).

Conclusion

Online education has emerged as a powerful force in the realm of learning, driven by technological advancements and the need for flexible, accessible, and personalized educational opportunities. While it offers numerous advantages, including accessibility, cost-effectiveness, and personalized learning, it also faces challenges such as the digital divide and the need for quality assurance. As we look to the future, the continued evolution of technology and the integration of innovative tools will shape the landscape of online education, making it an indispensable part of the educational ecosystem. The history of online education at universities is a testament to the transformative power of technology in expanding access to education. From early correspondence courses to the widespread adoption of online learning during the COVID-19 pandemic, the evolution of online education reflects the changing needs of learners and the innovative spirit of

higher education institutions. As technology continues to advance, online education will play an increasingly vital role in shaping the future of learning.

While online education in general offers many benefits, several demotivating factors can discourage lecturers from adopting this mode of teaching. Technological barriers, increased workload, doubts about efficacy, lack of personal interaction, and resistance to change are significant challenges that need to be addressed. To encourage more lecturers to embrace online education, institutions must provide robust technical support, offer professional development opportunities, recognize and address concerns about the effectiveness of online learning, and foster a supportive and adaptable institutional culture. By mitigating these demotivating factors, the potential of online education can be fully realized, benefiting both educators and students.

Implications for the Future

The emergence of online education has profound implications for the future of learning. As technology continues to evolve, we can expect online education to become even more immersive and interactive. Virtual reality (VR) and augmented reality (AR) technologies, for example, have the potential to create engaging and hands-on learning experiences that were previously unimaginable. Moreover, the integration of artificial intelligence can further enhance personalized learning by providing real-time feedback and support to students. AI-driven analytics can help educators identify learning gaps and tailor instructional strategies to meet individual needs effectively.

The rise of online education also calls for a rethinking of traditional educational models. Hybrid learning, which combines online and in-person instruction, is likely to become more prevalent. This approach can leverage the strengths of both modes, offering flexibility while maintaining the benefits of face-to-face interaction.

Looking ahead, the future of online education at universities is poised for continued growth and innovation. Emerging technologies, such as artificial intelligence, virtual reality, and augmented reality hold the potential to create more immersive and personalized learning experiences. These advancements will likely enhance student engagement and outcomes, further bridging the gap between online and in-person education. The integration of data analytics will enable institutions to better understand student needs and tailor educational offerings accordingly. The focus on lifelong learning

and the increasing demand for upskilling and reskilling in a rapidly changing job market will drive the expansion of online education.

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BRIDGING CULTURES THROUGH SUBTITLING: A CASE STUDY OF "*SOUTHLAND*" AND ROMANIAN SUBTITLES

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Abstract

With the rise of technology and globalisation, subtitling has become essential for accessibility and cross-cultural communication. This study explores the subtitling strategies employed by Romanian subtitlers in the crime drama series *Southland*, focusing on the translation of extralinguistic culture-bound references (ECRs). Using Jan Pedersen's model of translation strategies, the research analyses approximately 5,000 subtitles from different episodes, revealing how subtitlers navigate cultural differences between American and Romanian contexts. Findings indicate a strong reliance on source-language oriented strategies such as retention and specification to preserve cultural authenticity, alongside target-language oriented strategies such as generalisation and cultural substitution to adapt references for Romanian viewers. Paraphrase has also emerged as a key method for conveying cultural nuances. This research highlights the challenges of translating culture-bound items and emphasises the role of subtitlers as cultural mediators. By providing insights into Romanian subtitling practices, the study contributes to the understanding of audiovisual translation and sets the stage for future research in this evolving field.

Keywords: subtitling, extralinguistic culture-bound references, translation strategies, retention, generalisation, cultural substitution, paraphrase, calque

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As technology has become an integral part of everyday life, filling our lives with instant access to images, sounds, and information, and as cultural barriers continue to fade, it is no surprise that subtitling various audiovisual content has reached new heights. Subtitling audiovisual programmes has become crucial not only for accessibility, such as for the deaf community - expected to exceed 700 million people with disabling hearing loss by 2050 (*Deafness and Hearing Loss*, 2023) - but also for its significant role in foreign language education (Aksu Ataç & Günay-Köprülü, 2018; Hestiana & Anita, 2022). Furthermore, subtitles serve marketing purposes by improving SEO rankings for videos online, thereby drawing in more viewers and potential customers.

Subtitling, one of the three main ways of translating such programmes (alongside dubbing and voice-over) (Díaz-Cintas & Remael, 2014, p. 8), is considered part of the broader field of audiovisual translation (AVT) encompassing "media translation", "multimedia translation", "multimodal translation" and "screen translation" (Chiaro, 2009, p. 141). As times and demographics change, statistics reveal that 70% of American Gen-Zers and 53% of American Millennials watch their digital content with captions or subtitles turned on, due to these generations' viewing preferences and to their upbringing in highly digitalised environments (*Survey*, 2022).

A key challenge in subtitling has always been conveying culture-bound items (CBIs) to audiences from different cultures, particularly when there are significant differences between the source and target cultures. Given the lack of research in this specific area, especially within Romanian literature, this paper seeks to fill that gap by offering insights into how Romanian subtitlers have approached the translation of culture-specific items in films, with a focus on the crime drama series *Southland* (*Southland* (TV Series), 2024).

Literature review

Subtitling

Subtitling, a relatively new method of translation, gained recognition in the 1970s when it started being used for television programmes. Progress was made in the 1990s when the UK introduced a legal requirement for closed captions to accommodate deaf and hearing-impaired viewers (*The History of Subtitles: Past, Present and Future*, 2017).

Subtitling has received many definitions, being regarded as "a translation practice that consists of presenting a written text, generally on the lower part of the screen" (Díaz-Cintas & Remael, 2014, p. 8), "the process of providing synchronized captions for film and television dialogue" (Shuttleworth & Cowie, 1997, p. 161), being at the same time "a cheap, quick, foreign culture friendly mode of screen translation" (O'Connell, 2016, p. 67) as opposed to dubbing.

Dubbing is the process of substituting the original spoken dialogue in a film, television show, video, or other audiovisual content with dialogue in a different language, performed by voice actors. Countries such as Germany, Italy, and Spain adopted dubbing in the 1930s, primarily for nationalistic reasons. However, it appears to be losing ground to subtitling, which is more cost-effective (as it does not require actors) and retains the original performance, emotion, and nuances envisioned by the filmmakers. Romania is a country that uses subtitling as opposed to Hungary or Austria, which use dubbing as a preferred way of screen translation.

Despite its advantages, subtitling has its own drawbacks and limitations, including the need for reading, which can be challenging for individuals with reading difficulties. Additionally, spatial and temporal constraints can result in condensed or simplified translations (Delabastita, 1989, p. 20), potentially leading to the omission of important details. Scholars (Carroll & Ivarsson, 1998; Díaz-Cintas & Remael, 2014; Pedersen, 2011a) have agreed upon the technical criteria for the subtitle format on the screen, i.e. 20% of screen space for subtitles on screen (2 lines) and a maximum of 42 characters per line for Latin alphabets.

Moreover, subtitling requires linguistic skill, cultural sensitivity, and technical expertise to ensure that the subtitles enhance accessibility and comprehension without detracting from the viewing experience.

Difficulties of being a subtitler

Being a translator is inherently challenging, as it requires not only a deep understanding of both the source and target languages in terms of grammar but also an awareness of the cultural differences between them. When it comes to subtitling, this task becomes even more demanding. The above-mentioned constraints, along with the

various techniques subtitlers must employ "to make ends meet" classify subtitling as a "constrained translation" (Mayoral et al., 1988; Titford, 1982) or a "vulnerable translation" (Díaz-Cintas, 2003, p. 43), since viewers may question the translator's methods without fully understanding the complexities of this form of translation.

Culture-bound items in subtitling

The relationship between language and culture is symbiotic and dynamic, each continuously influencing and reshaping the other. That is why cultural items are regarded as one of the most challenging aspects for translators, who must also take on the role of cultural mediators (Katan, 1996).

One of the challenges encountered by subtitlers is the translation of culture-related items which Newmark (Newmark, 1988) classifies into five categories (ecology, material culture, social culture, organisations, customs, activities, procedures, ideas, and gestures and habits). As films are "... products of the culture from which they arise" (Nedergaard-Larsen, 1993, p. 207), they are naturally filled with cultural references. It is the translator's responsibility to accurately and thoroughly convey these references in the subtitles to "recreate" the foreign cultural context and help the audience understand and familiarise themselves with it.

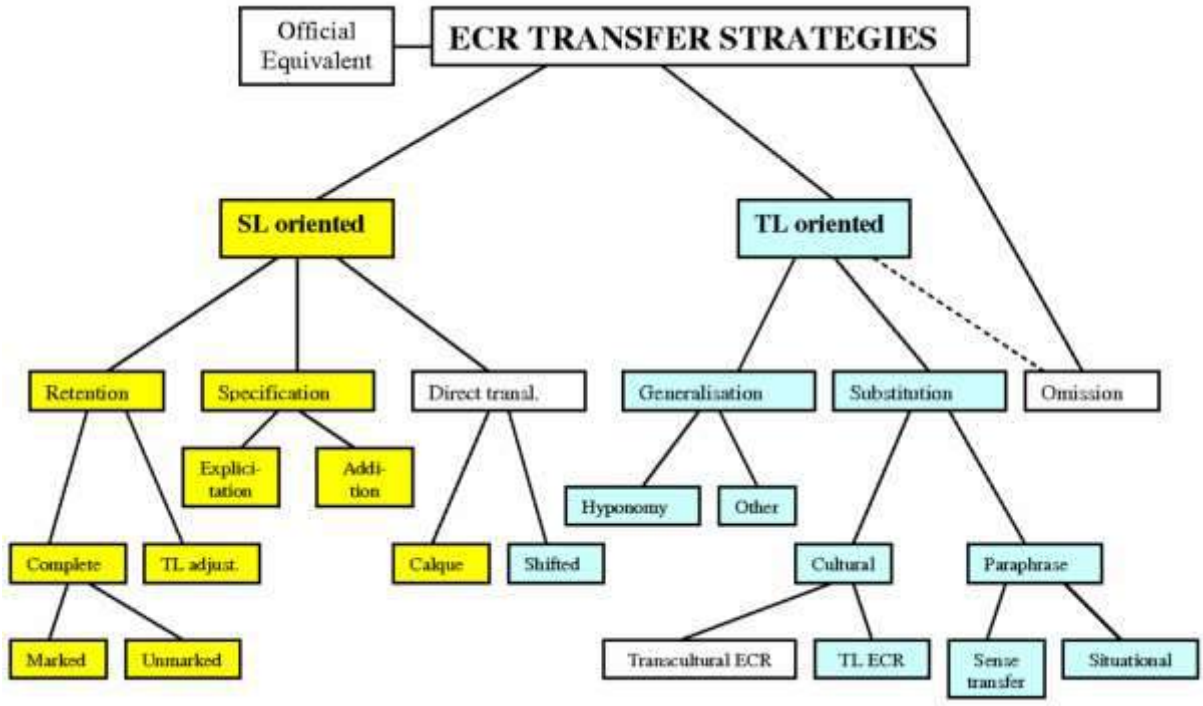
Translation strategies for culture-bound items

Throughout the time, scholars have developed different translation strategies meant to help translators in their endeavour of dealing with culture-bound items. Nedergaard-Larsen (Nedergaard-Larsen, 1993) proposed strategies such as verbatim transfer, culturally neutral explicitation, paraphrase and target language adaptation. Following this, (Tomaszkiewicz, 2001) suggested approaches including omission, transfer direct, adaption and substitution. On another note, Leppihalme (Leppihalme, 1997) concentrated on strategies used for translating allusions or culture bumps.

Pedersen's model (Pedersen, 2005) is the most comprehensive and detailed framework, classifying culture-bound items into intralinguistic and extralinguistic culture-bound references. Intralinguistic references encompass idioms, slang, proverbs while extralinguistic references pertain to non-linguistic cultural elements, such as names of people, places, and institutions. The importance of masterfully translating

extralinguistic culture-bound references (ECRs) is paramount when subtitling since "a person might be linguistically competent in a foreign language while still being culturally illiterate in a culture which uses this language" (Pedersen, 2011b, p. 47). Pedersen categorises the translation strategies employed for the rendering of extralinguistic cultural elements into source-language oriented (having three techniques, i.e. retention, specification and direct translation) and target-language oriented (i.e. generalisation, substitution and omission) and further divides them into different translation sub-techniques (see Figure 1).

Figure 1. Classification of ECR translation strategies (Pedersen, 2005)



Pedersen further posits that his model would most probably solve any extralinguistic culture-bound translation problem. In the author's opinion, Pedersen's framework stands out as the most comprehensive one when it comes to the subtitling strategies available to Romanian subtitlers.

Crime drama genre

In line with Nedergaard-Larsen's view (Nedergaard-Larsen, 1993, p. 221) that genre influences the translator's choice of translation strategies, it is important to emphasise the fact that crime drama genre is rich in culture-bound items since the law enforcement systems and the police jargon differ in the two cultures being analysed.

Methodology

Terminology

It must be pointed out that there is no consensus on the terminology used to describe the cultural elements in translation. Various scholars have chosen different terms, such as realia (Florin, 1993; Leppihalme, 1997), cultural words (Newmark, 1988), cultural-specific items (Aixelá, 1996), culture specific references (Gambier, 2004), culture-bound problems (Nedergaard-Larsen, 1993). Pedersen (Pedersen, 2005) initially introduced the term extralinguistic culture-bound references, which he later revised to extralinguistic cultural references in 2011. In this paper, the term extralinguistic culture-bound references (ECRs) will be used in accordance with Pedersen's definition of culture-bound items, as it highlights the nature of the terms analysed in the study:

> Extralinguistic Culture-Bound Reference (ECR) is defined as reference that is attempted by means of any culture-bound linguistic expression, which refers to an extralinguistic entity or process, and which is assumed to have a discourse referent that is identifiable to a relevant audience as this referent is within the encyclopedic knowledge of this audience (Pedersen, 2005, p. 2).

This study employs both qualitative and quantitative approaches, initially analysing the corpus of the subtitles collected by the author and subsequently categorising it based on Pedersen's model of translation strategies from both qualitative and quantitative perspectives.

Corpus

The corpus consists of episodes from seasons 1 and 4, totalling around 5,000 subtitles, translated by multiple subtitlers, including the author. The analysed series is *Southland*, a crime drama that began streaming on HBO Max in Romania in 2020. *Southland* portrays the lives of the police officers in the Los Angeles Police Department.

Analysis

The analysis of the subtitles was conducted using Pedersen's model for translating ECRs (discussed above). This model is applied to the existing corpus to identify the most commonly used translation strategies by Romanian subtitlers. It will also highlight how these strategies are used to adapt the ECRs in this particular film genre for a Romanian

audience unfamiliar with American police jargon. The research questions examined in this study are as follows:

1. What types of extralinguistic cultural references are present in this film genre?

2. What translation strategies have the Romanian subtitlers employed to address these references?

Discussion

As outlined above, Pedersen's model for translating ECRs will be applied to the translation of the *Southland* episodes. The following section will present and discuss the strategies employed by the translators.

SL-oriented strategies

Retention

Retention is the translation strategy that is the most faithful to the source text. It can be either "complete" or "adjusted" for the target audience. In the former case, it may be "marked" (using inverted commas or italics) or "unmarked", while in the latter case, minor spelling modifications may be made (Pedersen, 2005, p. 4). Examples from the corpus are provided in Tables 1a and 1b and explained thereafter.

Table 1a

Retention as a translation strategy (complete)

Complete - Unmarked
1. A-57, show us responding. [A-57, răspundem noi.]
2. A-36 in pursuit of an ADW suspect, in the alley off the corner of 113th and Bay. [A-36 urmăreşte un suspect înarmat pe aleea dinspre strada 113 şi Bay.]
3. Just another beautiful day to be a police officer in the city of Los Angeles. [O altă zi frumoasă să fii poliţist în Los Angeles.]
4. - "Someplace tropical". Man. - Would the Club Med in the Bahamas be ok? [- „Undeva tropical". Omule!

- E bine în Club Med în Bahamas?]

5. A-36 shots fired in the alley
off 8th street and Concord. In pursuit.
[A-36, focuri de armă pe aleea
de pe strada 8 cu Concord. Urmărim.]

6. Show us what you got RoboCop.
[Arată-ne ce poți, RoboCop.]

Complete - Marked

7. *Sayonara*, 57. You come back
next time for happy ending.

[*Sayonara*, 57. Să vii data viitoare
pentru un final fericit]

8.Welcome to Gabriella's *quinceañera*.
Angela and I cannot believe
that our baby is 15.

[Bine ați venit la *quinceañera* Gabriellei!
Mie și Angelei nu ne vine să credem
că are 15 ani.]

9. You like *dim sum*? I know a place.
[Îți place *dim sum*? Știu un loc.]

Table 1b

Retention as a translation strategy (TL adjusted)

TL adjusted

10. So keep eyes peeled for roving Corollas
driven by some knucklehead
with a shit look on his face.

[Uitați-vă după niște Corolla
conduse de un idiot
care arată ca un rahat.]

11. What's it like living in *The Truman Show*?
[Cum e în *Truman Show*?]

12. It's a long time to be lugging
that 15-pound Sam Browne
all over the place.

[E mult să cari după tine
un Browne de șapte kilograme.]

In examples (1), (2), (3), (4) and (5), complete and unmarked retention is used. "A-57" and "A-36" are police car identifiers that cannot be translated for the Romanian audience, as they are simply numbers and letters for differentiation. In (3), the name of "Los Angeles" remains untranslated, as does the well-known hotel chain "Club Med" in (4), and the iconic character "RoboCop" in (5).

Sometimes the word is fully retained but marked, as seen in example (7), where the speaker uses the Japanese term "Sayonara", meaning "good-bye" in English. For contextual reasons, it is left untranslated in Romanian, but being a foreign word, it is written in italics, similar to its use in English. A related case occurs in (8) with the Spanish word "quinceañera". Since the film is set in Los Angeles, home to a large Spanish-speaking community, the subtitler has chosen to retain the word, likely due to space constraints and to preserve its cultural significance, as translating "quinceañera" into Romanian would require a paraphrase. In (9), the Chinese snack name "dim sum" is also retained in italics, and as in (8), a paraphrase in Romanian would have taken up too much space.

The translated words are still retained in Romanian but adjusted to fit the context for Romanian viewers. For instance, in (10), the plural form of "Corollas" is omitted in the Romanian translation. Similarly, in (11), the definite article is dropped from "The Truman Show". A more notable example of retention, but with adaptation for the target audience, is seen in (12), where a potential mistranslation occurs, in the author's opinion. The name "Sam Browne", which refers to a type of police belt, is retained in Romanian even though "Browne" does not signify anything related to belts in this language. A more accurate translation would have used the hypernym "belt". It appears that the subtitler might have misunderstood "Browne" as an eponym, like "Colt" (which is retained as such in Romanian), but this is not applicable in this case.

It must be mentioned that this analysis has provided the author with a new situation, not found in Pedersen's framework, that was named partial retention or cultural retention, and which will be presented as follows:

(13) - I heard he's riding with Pootie Tang.
- Get out of town.

[- Am auzit ca merge cu Tang.
- Fugi de aici!]

"Pootie Tang" is a play on the name "Tang" (Jessica Tang), which, in this context, carries a vulgar connotation, referring to "vagina". This reflects the misogynistic jokes made by male officers about their female colleagues, a common occurrence in male-dominated professions. In this instance, the subtitler has opted for partial retention, keeping only the name "Tang", which is familiar to the audience, while omitting the crude pun associated with "Tang", a wordplay understood primarily by native speakers.

Specification

The specification strategy refers to the process of making a cultural reference more explicit by clarifying a term ("explicitation") through something that is "implicit in the ST" (Pedersen, 2005, p. 4) or by adding information ("addition") in the target language. It is used when a term in the source language is either too vague or not easily understandable for the target audience due to cultural differences. The translator provides additional details to ensure that the audience fully understands the reference. This strategy is crucial in maintaining the cultural integrity of the source material while making it accessible to a broader audience. The examples for the specification strategy can be found in Table 2.

Table 2.

Specification as a translation strategy

Specification - By Explicitation
14. Send an RA unit, our location 1600 block, Cahuenga Boulevard. [Trimiteţi o ambulanţă pe Bulevardul Cahuenga, nr. 1600.]
15. It was an ADW call. [Era un apel pentru asalt cu arma.]
16. - Hey, boot. - P-2 now. [-Bună, răcane! - Sunt agent plin acum.]
17. Now she's "Grambo" forever. [Acum e „mamaie Rambo".]
Specification - By Addition
18. In the alley off the corner of 113th and Bay.

[Pe aleea dinspre strada 113 și Bay.]

19. The Six-Fours come back,
it's going off. You know it.

[Dacă se întoarce banda 64,
e de rău și știi.]

In example (14), "RA" is an abbreviation unfamiliar to the Romanian audience, as it is specific to the Californian culture and stands for "Rescue Ambulance". The subtitler has chosen to clarify this by using the word "ambulance" in Romanian, which is implied in the original term. Similarly, in (15), the abbreviation "ADW" (assault with a deadly weapon) is explained, offering an explicitation of the police code. A comparable case appears in (16), where "P-2" is translated as "agent plin" ("full agent") in Romanian. "P-2" refers to an officer rank just above rookies ("răcan") in the LAPD, a concept again unfamiliar to Romanian viewers. In example (17), irony is expressed through the portmanteau word "Grambo", combining "grandmother" and "Rambo". Given that many Romanian viewers recognise the Rambo character, the subtitler has decided to deconstruct "Grambo" into its individual elements for clarity, translating it as "Grandma Rambo" ("mamaie Rambo").

In example (18), on the other hand, the subtitler has opted to explain "113th" by adding that it is a street, a necessary clarification since Romanian viewers may not be accustomed to streets being named by numbers. A similar approach is taken in example (19), where "Six-Fours", an American gang likely unknown to most viewers, is translated with a hypernym ("banda 64") ("gang 64") to make it more understandable for the Romanian audience.

Direct translation

In Jan Pedersen's taxonomy, calque and shifted direct translation are part of the direct translation category, used when the subtitler resorts to maintain a close connection to the source text. While a calque is a direct, word-for-word or phrase-for-phrase translation that maintains the structure of the original language being sometimes seen as "exotic" (Pedersen, 2005, p. 5), a shifted direct translation involves making slight adjustments to the source text. The shift typically ensures that the target text remains

idiomatic and natural, being more "domestic" (Pedersen, 2005, p. 5). Table 3 presents the calque and shifted direct translations found in the present corpus.

Table 3

Direct translation strategy

Direct translation - Calque
20. What's up, Officer Sherman? [Care-i treaba, ofiţer Sherman?]
21. Well, I'm sorry about that, Officer. I have truly done my best. [Îmi pare rău pentru asta, dle ofiţer. Am făcut tot ce am putut.]
22. Officer Sherman! Hi. I hope I haven't kept you waiting long. [Ofiţer Sherman. Bună! Sper că nu te-am făcut să aştepţi mult.]
23. Actually, it'll be 22 in April, Sarge. [De fapt, se fac 22 de ani in aprilie, dle sergent.]
Direct translation - Shifted
24. - No "Espresso Yourself". - Officer Cooper. Officer. [- Sau „Espresso Singurel". - Poliţist Cooper.]

The translations in (20), (21), and (22) represent typical instances of calque, which in this context result in mistranslation in Romanian. This is because "ofiţer" in Romanian refers to a military rank and is not typically used for police officers. As a result, the term "ofiţer" feels out of place in this context. A more appropriate domestic alternative would have been "domnule ofiţer de poliţie" ("Mr. Police Officer") (a generic phrase for police officers, though too lengthy) or simply "domnule poliţist" ("Mr. Policeman"). Another instance of mistranslation appears in (23) with the term "Sarge," which is a military rank not found in police hierarchies. It is worth noting that the subtitler has duly obeyed the grammatical and stylistic conventions in Romanian by using the polite form of address "domnule" (abbreviated as "dle") alongside the rank title – "dle ofiţer", "dle sergent". In this case, "Sarge" could have been translated, albeit not with a

perfect equivalent, by "comisar" or "chestor". In example (24), "officer" is the only case where the translation has been adapted for the Romanian viewers, being rendered as "poliţist", a term that resonates more naturally with the Romanian audience.

TL-oriented strategies

Generalisation

Generalisation for Pedersen (Pedersen, 2005, p. 6) involves substituting a specific term or concept (a hyponym) with a broader, more general category (a hypernym) in the target language. Hyponymy is a linguistic relationship where one term (the hyponym) is a more specific instance of a broader category (the hypernym). This strategy is particularly useful when the translator assumes that the target audience may not be familiar with the specific term or reference in the source language, and a broader term is sufficient to convey the overall meaning. Concrete examples are presented in Table 4.

Table 4

Generalisation as translation strategy

Generalisation - Hyponomy
25. Is that the Six-Four Hustlers rolling up on you? [Aia e banda care te vrea terminat?]
26. We were looking for 3rd Street and MapQuest took us to 3rd Avenue. [Căutam strada 3 şi GPS-ul ne-a dus pe bulevardul 3.]
27. Cut that ... up with some Stoli and you're on your way. [Dacă o iei cu nişte votcă, poţi să pleci.]

In example (25), a hypernym ("banda" or "the gang") is used in place of the gang's name ("Six-Four Hustlers") since it would not hold meaning for Romanian viewers. A similar approach is taken in example (26), where "MapQuest", a GPS app, is substituted with "GPS" because the latter is more widely recognised by the Romanian audience. Additionally, in example (27), "Stoli" refers to a vodka brand from the USSR. Again, it was translated by generalisation, by using a hypernym instead ("vodka"). Generalisation via hyponymy is an effective tool for making culturally specific terms more accessible to the target audience by replacing them with broader, more familiar terms.

Substitution

Two commonly used strategies for dealing with extralinguistic culture-bound references (ECRs) by Pedersen are cultural substitution and paraphrase. Both strategies aim to address the challenge of translating culture-bound elements that may not be easily understood by the target audience, but they do so in different ways.

Cultural substitution.

In Jan Pedersen's framework for audiovisual translation, particularly when dealing with extralinguistic culture-bound references (ECRs), the concept of cultural substitution involves replacing a culture-bound reference from the source language with a reference that is more familiar to the target audience. Based on the level of familiarity to both the source and target audiences, this can be done either through transcultural ECRs or target language ECRs (TL ECRs) (Pedersen, 2005, pp. 6–7). A transcultural ECR is a cultural reference that exists in multiple cultures or is widely known across different cultures, including both the source and target cultures (e.g. official equivalents). These references are often global or international in nature and can be understood without the need for translation or adaptation, while target language ECRs refer to a cultural reference that is specific to the target culture and familiar to the target audience and is the most "domesticating" (Pedersen, 2005, p. 7) translation strategy, used for official institutions and titles. This strategy is also used in the present corpus by the subtitlers (see Table 5).

Table 5

Cultural substitution as translation strategy

Cultural substitution - Transcultural ECR
28. I hear they're interested in you for *Fast & Furious 6.* [Cică-s interesaţi de tine pentru *Furios şi iute 6.*]
29. It's gonna take Jesus. [Numai Iisus]
30. I dialed 911. [Am sunat la 112.]
31. What is this, ghetto Cinderella? [Cenuşăreasa din ghetou?]

32. So, which Ben Bunny was it last night?
[Care „iepuraş" a fost azi-noapte?]

Cultural substitution - TL ECR

33. I mean, we can't live
2,000 feet from a school,
300 feet from a child-safety zone,
500 feet from a public park.

[N-avem voie la 600 m. de şcoală,
90 m. de o zonă pentru copii
şi 150 m. de un parc public.]

34. Okay, great.
Truck Norris will be on Franklin at 1.

[Bine, grozav.
Truck Norris va fi pe Franklin la ora 13:00.]

35. Not to mention the pool,
which is like badge bunny central.

[Să nu mai vorbim de piscină,
care atrage puicuţe.]

In example (28), the subtitler has preferred the official translation of the well-known film The Fast and the Furious, given its familiarity with the target audience. Similarly, in examples (29) and (31), the names "Jesus" and "Cinderella" were translated using their official equivalents. In example (30), the subtitler has replaced the emergency number "911" with its Romanian counterpart, "112", which is more recognisable by the Romanian audience. Example (32) features irony and sarcasm, which are especially difficult to translate, particularly when tied to a cultural reference. In this instance, the speaker refers to Ben Bunny, a book character well-known to English-speaking children but unfamiliar to Romanian audiences. The reference plays on the idea that the interlocutor, who has a child at home, should have been reading a bedtime story but instead went out in search of female companionship. To adapt this, the subtitler has opted for a culturally relevant equivalent, using a term in quotation marks to describe a woman associated with the iconic Playboy "bunny" figure, a reference that many Romanian viewers would recognise.

In contrast, examples (33) and (34) showcase cultural translations where the unfamiliar ECR is substituted with a reference from the target culture, such as converting

feet (imperial system) to meters (metric system) or adjusting the time format from 1 p.m. to 13:00. Unlike example (32), in (35), the subtitler has decided not to retain the cultural reference in quotation marks, opting instead for a target culture equivalent. Instead of using "bunny" to describe women, s/he has chosen a more familiar Romanian term, replacing "bunnies" with "chicks" ("puicuțe").

Paraphrase.

Paraphrase involves rewording or explaining the cultural reference from the source language in more general terms that make it comprehensible to the target audience. This strategy is often used when there is no direct equivalent or when cultural substitution is not feasible. The translator rephrases the meaning of the cultural reference without replacing it with a specific reference from the target culture. Jan Pedersen's two types of paraphrase strategies—paraphrase with sense transfer and situational paraphrase—offer flexibility in handling cultural references in subtitling.

Paraphrase with sense transfer involves rewording the cultural reference while maintaining its core meaning and communicative purpose. This type of paraphrase does not introduce new information but reformulates the original message to make it clearer to the target audience.

The situational paraphrase involves rewording or describing a cultural reference by providing an explanation of the situation or context. This type of paraphrase often introduces new information or explanatory context to help the target audience understand the cultural reference. Unlike the paraphrase with sense transfer, the situational paraphrase adds extra detail to explain why the reference is relevant or what it means in the original context. It should be mentioned that this type of paraphrase was not used by the subtitlers of this corpus. Table 6 synthesises the examples of paraphrase with sense transfer found in the corpus.

Table 6

Paraphrasing as translation strategy

Paraphrase with sense transfer
36. Let somebody else play Captain Save-A-Hoe. [Lasă-i pe alţii să salveze curvele.]

37. It was either this or Teach for America.
[Ori aici, ori ca profesor la sate.]

38. The fact that they just happen
to cite every vehicle owned by a Two Trey,
skipped all the rest.
That part's a little weird.

[Faptul că au mentionat toate vehiculele de fițe
și le-au sărit pe celelalte
e cam ciudat.]

In (36), the translator chose to paraphrase "Captain Save-A-Hoe", a derogatory American term coined by rapper E-40, referring to a man who goes to great lengths for promiscuous women, as it likely would not be understood by Romanian audiences. The phrase was adapted to mean "let others save the hoes". A similar paraphrasing strategy is applied in (37), where "Teach for America", an organisation serving underprivileged schools and communities, is not well-known in Romania. The translator has rephrased it as "teacher in the rural areas". In (38), "Two Trey" refers to Michael Jordan, who had the number 23 on his jersey, used "Two Trey" on his license plate, and had a sneaker line named after him. Since this information may not be widely known among Romanian viewers, the subtitler has adopted the paraphrase, conveying the intended meaning—that a vehicle owned by a "Two Trey" is a luxury car—by using the Romanian term "vehicul de fițe" ("a flashy car").

In what follows, using MAXQDA software, the typology of extralinguistic culture-bound references found in the *Southland* series, typical of police genre films, along with their frequency in the analysed corpus, is presented in Table 7 below.

Table 7

Types of ECRs in "Southland" and their frequency

Types of ECRs	Freq. (%)
Names of police ranks	91.2
Police terminology (car codes, abbreviations, acronyms)	89
Names of streets, boulevards, buildings	78.7
Foreign words (related to food, people, customs)	67
Ironic/sarcastic phrases involving a cultural reference	51
Well-known cultural figures and symbols (e.g. Cinderella, Jesus, Robocop, Rambo)	48.6

Considering the significant number of ECRs in the analysed episodes, the paper explores the subtitlers' choices regarding the translation strategies, along with their preference for them.

Table 8

Types of translation strategies used by Romanian subtitlers for ECRs in "Southland"

Types of translation strategy	Freq. (%)
Retention	85.6
Cultural substitution	74.8
Specification by explication	67.8
Direct translation	55.9
Paraphrase with sense transfer	46.3
Generalisation	34

Conclusions

The analysis of subtitling strategies employed in the *Southland* series provides valuable insights into how Romanian subtitlers handle extralinguistic culture-bound references (ECRs), particularly within the context of police dramas. By applying Jan Pedersen's model (2005) for ECR translation strategies, this study has revealed patterns that reflect the complexity of adapting culturally specific terms for a foreign audience.

Source-language oriented strategies, such as retention (85.6%), were frequently used to maintain cultural authenticity. Retention was either complete or adjusted for Romanian viewers, demonstrating the subtitlers' commitment to preserving the original cultural context of the source material. However, in some instances, subtitlers have opted for partial retention, a strategy not found in Pedersen's model, where they have preserved part of a cultural reference and have omitted another to facilitate understanding without losing too much of the original meaning.

Specification strategies were also prevalent, where subtitlers have made implicit information explicit to aid understanding (67.8%). Specification was employed when subtitlers needed to clarify abbreviations or cultural references unfamiliar to Romanian viewers. This strategy has helped to make implicit cultural items, such as police codes and location names, explicit and accessible, ensuring that Romanian audiences could follow the context and narrative more easily. Direct translation (55.9%), which includes both calque and shifted direct translation, was used to maintain a close connection with

the source text. However, some calque translations resulted in mistranslations, especially when dealing with military and police ranks unfamiliar in Romania. This highlights the limitations of strict word-for-word translations when cultural contexts diverge significantly.

On the other hand, target-language oriented strategies, particularly generalisation (34%) and cultural substitution (74.8%), were employed when cultural references were too specific or obscure for the Romanian audience. In cases where the Romanian audience might not be familiar with a particular reference, subtitlers have preferred to either broaden the meaning (through generalisation) or replace it with a culturally equivalent term or phrase. For example, references like “bunny” in American culture were adapted to “chick” in Romanian, making the translation more accessible to local viewers. This approach underscores the subtitlers' role as cultural mediators, adapting content to suit the target audience's cultural context (Katan & Taibi, 2021). By using broader terms or explanations, subtitlers have ensured that the core message was retained, even if some cultural nuances were lost. Paraphrase with sense transfer (46.3%) was another effective strategy, allowing subtitlers to reformulate certain cultural references while retaining their original meaning. This approach has ensured that key narrative elements and cultural nuances were preserved, even when direct translation was not feasible. However, the lack of situational paraphrase in the corpus suggests that Romanian subtitlers have primarily focused on maintaining the original intent rather than overexplaining the context.

This study underscores the dynamic nature of subtitling and the necessity for continuous research in the field of audiovisual translation. The findings not only illustrate how subtitlers tackle cultural challenges but also pave the way for future research in audiovisual translation, especially in the Romanian context, where such analyses are scarce. By applying Pedersen's model to a specific genre, the research contributes to a deeper understanding of how subtitlers navigate cultural nuances and the constraints inherent in subtitling (Díaz-Cintas & Remael, 2014). It highlights the practical challenges subtitlers face, such as space and time limitations, and the need to make quick decisions that balance fidelity to the source text with the target audience's comprehension.

Moreover, the identification of new strategies, such as partial retention, suggests that existing models may require adaptation to encompass emerging translation practices. This opens avenues for further research to refine translation theories and models to better reflect the realities of contemporary subtitling. Understanding these strategies is crucial for training subtitlers and developing guidelines that enhance cross-cultural communication, ensuring that audiovisual media remains accessible and culturally relevant. As technology advances and the demand for subtitled content grows—particularly with the rise of streaming platforms and globalised media consumption—such studies become increasingly important. They provide insights that can improve the quality of subtitles, contribute to the professional development of translators, and enhance the viewing experience for diverse audiences. Ultimately, the findings indicate that subtitlers must carefully balance between maintaining cultural integrity and ensuring comprehension for a Romanian audience less familiar with American police jargon. The use of different strategies based on Pedersen's model demonstrates the subtitlers' strategic decision-making in adapting ECRs, depending on the term's relevance and the target audience's cultural literacy. By identifying these strategies, the study contributes to the ongoing discussion on audiovisual translation in Romania and underscores the importance of nuanced translation approaches in subtitling cross-cultural content.

This study also has its limitations. Since *Southland* is a crime drama, the findings are specific to the police procedural genre. Subtitling strategies for cultural references could vary significantly in other genres such as comedy, fantasy, or romance, where cultural items or humour play a larger role. This limits the generalizability of the results to audiovisual content outside of this specific genre. The study concentrates on Romanian subtitling strategies, which may not reflect subtitling practices in other languages or cultures. Different languages have different subtitling norms and constraints (e.g. languages with different sentence structures, or space constraints in Asian languages); therefore, the findings may not be directly applicable to other languages. The study does not include an audience reception analysis to understand how Romanian viewers perceive and comprehend the translated cultural references. Future studies could also point to the effectiveness of the subtitling strategies used by analysing the target audience's reception and whether the subtitled content achieves its communicative and cultural goals.

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EXPLORING THE LINGUISTIC PATTERNS OF GRATITUDE: A COMPARATIVE ANALYSIS OF ACKNOWLEDGMENTS IN PHILOSOPHY PHD THESES

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Abstract

Acknowledgments as expressions of gratitude are not only mere formalities in academia but also represent heartfelt attempts by researchers to acknowledge the support that shaped their academic journeys. They are a specific academic genre in which personal texts are produced as a part of academic genres such as theses or books. Hence, a systematic understanding of the linguistic features of this specific genre may contribute to the literature on academic writing. Comparing expressions of gratitude across English, German, and Turkish L1 academic contexts, this study presents a detailed picture of linguistic patterns in Ph.D. thesis acknowledgments in the field of Philosophy. We found that thanking for academic purposes was the main reason for gratitude in the three cultures. Our analysis also revealed the influence of cultural and linguistic nuances on the syntactic patterns of gratitude in the three contexts. We concluded that while acknowledgments remain deeply personal and emotionally charged, they adhere to genre-specific encoding patterns and share common lexical preferences, which require explicit instruction in academic writing courses.

Keywords: academic genres, acknowledgments, linguistic conventions, gratitude, PhD theses

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Acknowledgments as an Academic Genre

> A "Cinderella" genre: Like the heroine in the children's fairy tale, acknowledgments are a taken-for-granted part of the background, a practice of unrecognized and disregarded value deserving of greater attention (Hyland, 2003, p. 243).

There is a general agreement that academic discourse is constructed on disciplinary, cultural, and genre-based conventions of academic communities. The style of writing in the academic discourse points to different ways of building writer-reader relationships and authorial stances and marshalling arguments across disciplines and cultures. The specific conventions of genres also influence the pragmatic and linguistic choices of academic writers. Studies on academic texts such as postgraduate genres, research articles, scientific books, and abstracts show that there exist disciplinary, cultural, and genre-based conventions in academic discourse.

The research up to now has tended to focus on linguistic properties of a wide range of academic genres yet acknowledgments have received scant attention. Swales (1990) categorizes academic genres into three categories regarding the audience type. Primary genres (research-process genres) like research articles and postgraduate genres construct peer communication while secondary genres – e.g. textbooks – serve instructive purposes. The occluded genres such as cover letters are concerned with confidential and semi-confidential exploitation of texts in academic discourse. Concerning acknowledgments, they are like "a Cinderella genre" (Hyland, 2003, p. 243).

Dating back to the 16th century, expressing gratitude in the form of acknowledgments is an ordinary process in academic texts. "Acknowledging the assistance and contributions of others is now a well-established feature of the scholarly communication process" (Hyland & Tse, 2004, p. 259). With its clear aim and place in texts, this genre has distinct rhetorical features. It provides writers a rhetorical space to both state their genuine gratitude for assistance and to mitigate a capable academic identity. It, therefore, reflects the strategic choices of writers rather than a mere listing of gratitude.

More widely, it would be wrong to consider acknowledgments as a summary of gratitude. Hyland (2004, p. 305) states that "They look inwards to the text and its author and outwards to the factors which help construct them both, and it is this which distinguishes acknowledgments as a genre." Seemingly, they have both personal and disciplinary norms, which make them of considerable interest to linguists. Through interviews with postgraduate students and the analysis of Ph.D. and MA theses acknowledgments, Hyland (20003) claimed that acknowledgments are grounded on disciplinary variations and identity choices of writers. Hyland (2004) compared the moves of acknowledgments in Ph.D. and MA theses in six disciplines written by non-native speakers of English. In addition to disciplinary variations, he found genre-based differences in Ph.D. and MA theses acknowledgments. In the same year, Hyland and Tse conducted another study to examine the moves and lexico-grammatical features in Ph.D. and MA theses acknowledgments. Ph.D. students in the "soft" sciences employed a greater variety of lexico-grammatical patterns.

Following Hyland and Tse (2004), some researchers conducted studies about the moves of this genre in Persian and Arabian contexts. Concentrating on generic structures of acknowledgments in Arabic, Al-Ali (2010) observed that Arab writers utilized certain sociocultural-specific components reflecting the religious beliefs and the academic and social conventions of the Arab writers. Mohammadi and Tabari (2013) draw our attention to politeness in Persian doctoral acknowledgments in seven disciplines. The study revealed that the majority of communicative moves and linguistic steps used by the Persian and English writers were related to face management. Kuhi and Rezaei (2014) examined the moves of acknowledgments in MA and Ph.D. theses, research articles, and textbooks in Iranian and English and observed cultural variations in these four genres. In a diachronic study, Alemi and Rezanejad (2016) investigated the moves in Persian doctoral dissertation acknowledgments in hard and soft sciences and found statistically significant differences in the moves of this genre between hard and soft disciplines. In another study, Alotaibi (2018) displayed the absence of hedges and engagement markers in acknowledgments written by Saudi students at U.S. universities.

Acknowledgments not only constitute a distinctive academic genre, but they also show variations across academic disciplines and cultures. Giannoni (2002) studied acknowledgments in English and Italian research articles in seven disciplines and

observed some common rhetorical norms maintained by sentential boundaries in both languages. In a diachronic study, Scrivener (2009) examined doctoral dissertations' acknowledgments in the field of history and reported that history doctoral students expressed gratitude first for academic assistance and then for moral support. Šinkūnienė and Dudzinskaitė (2018) compared acknowledgments in scientific books and doctoral dissertations in English and Lithuanian and observed that British researchers put more emphasis on this genre by marking them as long separate sections. The distributions of the moves of acknowledgments were not identical in the two academic communities. In a recent study, Tang (2021) examined the gender differences in MA theses acknowledgments and found striking gender differences in the selection of lexical items to express gratitude.

The literature on acknowledgments indicates the prominence of understanding the disciplinary and genre-based variations that exist among cultures. Tang (2021) emphasizes that this genre is conditioned by the conventional linguistic patterns of academic communities. However, very little is known about the features of acknowledgments in L1 academic contexts. This paper attempts to identify the differences in terms of the reasons for thanking, lexico-grammatical patterns, and choices of authorial subjects in acknowledgments in Ph.D. theses in the discipline of Philosophy written in English, German, and Turkish. The main reason for the selection of Ph.D. theses is that this genre is the key to gaining membership in an academic community and an outcome of a challenging process, in which writers sacrifice many things during thesis writing.

1. What are the reasons for thanking in English, German, and Turkish Ph.D. acknowledgments?
2. What are the lexico-grammatical patterns used in Ph.D. acknowledgments in English, German, and Turkish?
3. What are the preferred choices of authorial subjects by English, German, and Turkish postgraduate students in Ph.D. acknowledgments?

The Act of Thanking

Koller (2001) states that when we think about the act of thanking, our minds often go to everyday situations where we verbally or even non-verbally thank someone in face-

to-face interactions. These situations include, for example, thanking someone for holding the door, a compliment, a gift, or help we have received. In these contexts, the act of expressing thanks tends to follow established patterns and is more or less ritualic, in which people often use a set of familiar phrases like 'thank you' or 'thanks' without necessarily expressing deep or spontaneous gratitude. These phrases of thanking follow certain social norms that apply when people interact in similar situations and they involve non-verbal cues like eye contact, gestures, and body language, as well as the words spoken. According to Koller (2001), these norms form a part of a collective social structure, a concept similarly articulated by Goffman (1973), who states that this structure governs a wide range of social contexts, encompassing public, semi-public, and private situations, regardless of whether they are formal events or casual everyday interactions.

In academic contexts, the act of thanking presented in acknowledgments becomes more complex due to academic power dynamics, individual emotional elements, and psychosocial factors combined with specific textual features. Yang (2012) asserts that the act of thanking is perceived differently by writers in different academic communities, which influences the thanking strategies adapted and rhetorical choices made. For Giannoni (2002), acknowledgments display the intellectual debts of the people who contributed to academic texts. They are the attempts of writers for prestige (when acknowledged people are prominent academics or organizations) and credibility concerning collaborative scholarship.

Acknowledgments are an academic genre grounded on social expectations rather than the personal feelings of writers, and these expectations are triggered by the choices of textual patterns that are determined by the structure of expressing gratitude and the specific communicative task of conveying thanks in academic texts. According to Koller, an acknowledgment consists of a series of thank acts, which can be represented as “Act of Thank 1, Act of Thank 2, Act of Thank 3, and so on, up to Act of Thank n” (Koller, 2001, p. 290). This fundamental and straightforward textual pattern, which underlies every acknowledgment, serves as the basis for the formulation process (Sandig, 1997). In other words, it guides the creation of individual textual instances.

According to Koller (2001, p. 290), acknowledgments in scholarly texts consist of at least one, typically two or more acts of gratitude. In these acts of gratitude, the central component is the verbal action of thanking, referred to as the action of thanking. The action of thanking is carried out by an acknowledger, directed towards a recipient of thanks, speaks the acknowledgee, and is motivated by a reason of thanking. Often, qualifying elements are added to these components. In line with Koller's illustration in German (Koller, 2001, p. 290), we have constructed an English example to clarify the classification of thanking classification, as detailed in Figure 1.

Figure 1

Koller's (2001) classification of thanking

"In addition, I would like to express my deep gratitude to my primary advisor for his unwavering guidance throughout my research."	
In addition:	positioning of the acknowledgee within other acknowledgees
I:	acknowledger
would like to express my gratitude to:	the action of thanking
deep:	qualification of the thanking action
my advisor:	acknowledgee
primary:	qualification of the acknowledgee
for his guidance throughout my research:	reason of thanking
unwavering:	qualification of the reason of thanking

For Hyland and Tse (2004, p. 264), the act of thanking is rested on three main reasons:

- thanking for academic assistance: thanks for intellectual support, ideas, analyses feedback, etc.
- thanking for resources: thanks for data access and clerical, technical, or financial support.
- thanking for moral support: thanks for the encouragement, friendship, sympathy, patience, etc.

In light of the literature, we shaped the methodology of this study, as will be explained in the following section.

Methodology

Data Collection

This cross-cultural study was based on a self-complied corpus of 150 Ph.D. theses acknowledgments in English, German, and Turkish, totalling 39.295 words. The writers had to receive their Ph.D. education from universities in the USA, Germany, and Türkiye. The gender of the writers was not the focus of this study. Each sub-corpus consisted of 50 Ph.D. theses acknowledgments written between 2018 and 2022 in the field of Philosophy. The size of each sub-corpus is shown in Table 1. The acknowledgments were copied and pasted in separate Microsoft Word files. Each text was labelled using the year + the initial letter of the language + the number of the text. For example, 2019-E-12 indicates the acknowledgments were the 12th text written in 2019 in English.

Table 1

Corpus Size (50 dissertations in each context)

Sub-corpus	Acknowledgments	Words
English	50	15.785
German	50	13.320
Turkish	50	10.190

The acknowledgments in the English corpora were chosen from the database of ProQuest Theses and Dissertations (PQDT)[1]. The acknowledgments in the German corpora were derived from the database of the Deutsche National Bibliothek[2]. The acknowledgments in Turkish were selected from Ph.D. theses published online at YOKTEZ, the Thesis Center of the Council of Higher Education[3].

For the genre of acknowledgments, it is characteristic that they exist in written form and function as non-independent texts. Acknowledgments are not separately published but rather constitute an academic document, such as a dissertation, along with other elements like the title page, table of contents, preface, list of abbreviations, main text, bibliography, table of figures, etc. Sometimes acknowledgments are also considered as a section of the preface. In our data, both separate acknowledgments and those integrated into the preface were included. Regarding the positioning of acknowledgments in our data, most of the

[1] ProQuest Theses and Dissertations - https://www.proquest.com/index
[2] Deutsche National Bibliothek - https://www.dnb.de/DE/Home/home_node.html
[3] YOKTEZ - https://tez.yok.gov.tr/UlusalTezMerkezi/giris.jsp

acknowledgments were placed at the beginning of the theses in the three contexts. In examining the titles of acknowledgments in our data, we observed a diverse range of titles used in English, German, and Turkish theses. In the English data, there were 7 titled as Acknowledgment, 42 as Acknowledgements, and one without a title. In the German dataset, 38 acknowledgments were titled as Danksagung (Acknowledgment), 9 as Vorwort (Preface), 2 as Dank (Thank), and 1 with no title. In the Turkish data, the titles varied, with Teşekkür (Thank) being used 43 times, along with 6 titled as Önsöz (Preface), and 1 with no title.

Data Analysis

The first aim of this study was to find the reasons for thanking in the acknowledgments in the three contexts. To do this, we utilized the three categories of thanking - academic, moral, and resources- proposed by Hyland and Tse (2004). Each corpus was checked manually by each researcher to identify the reasons for thanking and the identified reasons were tagged as A (academic), M (moral), and TR (thanking for resources). Frequency counts and percentages of each category of reasons were calculated.

The second concern of the study was to find out the patterns of gratitude in acknowledgments in the three linguistic contexts. As indicated in Table 2, we categorized the patterns into five categories, proposed by Hyland and Tse (2004). We first read each corpora and labelled all the patterns in each category. We then converted each corpus from Word files to UTF-8 txt files. Using AntConc (2023) - a free corpus analysis tool- we calculated the occurrences of the identified patterns. The percentages of the items in each category in each corpus were calculated.

Table 2

Patterns of expressing gratitude

Nominalization	"My sincere thanks to..."
Performative verb	"I thank..." "The author appreciates..."
Adjective	"I'm grateful to..." "The author is thankful for..."
Passive	"Y is thanked for..." "Appreciation is given to..."
Bare mention	"I cannot go without mentioning..." "X was helpful in..."

Hyland & Tse, 2004, p.266

The third step of the analysis was to examine the deployment of authorial pronouns in each corpus. To do this, we employed the four categories established by Hyland and Tse (2004) – I/my, none, no author, the author. We checked each instance of authorial pronoun usage manually and calculated the frequency counts and percentages by running descriptive statistics. We also discussed the reasons for the similarities and differences in the employment of authorial pronouns.

Findings and Discussion

Thanking is the pillar of the acknowledgments genre in which the Ph.D. students display their gratitude for academic assistance and support, and feedback they received from members of the academic community such as advisors, committee members, and colleagues. They also appreciate the moral support they get from their families, friends, and colleagues. The third reason for thanking is the technical or financial support taken from colleagues or institutions. The first attempt of the present study was to conduct a cross-cultural analysis of the reasons for thanking. Inconsistent with Šinkūnienė and Dudzinskaitė (2018), who found the same percentages of academic and moral reasons for thanking in Lithuanian Ph.D. theses, we found an emphasis on thanking for academic reasons in the three data sets as shown in Table 3.

Table 3

Distribution of thanking reasons

	English		Turkish		German	
	f	%	f	%	f	%
Academic	534	78	235	64	276	59
Moral	140	21	117	32	104	22
Resources	9	1	14	4	87	19

Thanking for academic assistance accounted for 78% of the English data, followed by moral support, comprising 25% of the data. With a percentage of 1, thanking for resources was rarely observed. Similarly, in the Turkish data, we observed similar tendencies. 64% of reasons for thanking marked in the data were about academic assistance. Moral support had a percentage of 32. Only 4% of the data contained thanking for resources. Regarding the acknowledgments in German, expressions of gratitude for academic assistance constituted a predominant proportion, standing at 59%. Acknowledgments involving moral support had a notable share, accounting for 22%. While the German data placed thanking for resources at 19%,

which was consistent with its position in Turkish and English, it has to be noted, that this percentage was significantly higher in German.

Across all three languages, thanking for academic assistance appeared to be the most prevalent reason for acknowledgments. Acknowledgments were a means of showing gratefulness for any kind of intellectual support received from members of the academic community. While writing the acknowledgments, the Ph.D. students thanked those who helped them in their theses including their supervisors, thesis committees, professors, and colleagues, as seen in the extracts below. There were also cases when the writers thanked their colleagues for academic encouragement and fruitful discussions (extract 3).

1. I would like to thank the members of my committee for the guidance, confidence, and help they gave me during this process. (2018-E-2)

2. Bu araştırmanın sonunda, tez danışmanım Doç. Dr. Ç.T.'a en içten teşekkürlerimi sunarım.
(I would like to thank my supervisor, Assoc. Prof. Dr. Ç. T.). (2018-T-6)[4]

3. Thanks to D. for careful and insightful comments on my written prospectus and my prospectus defense and a good deal of encouragement when I needed it. (2019-E-12).

4. Mein Dank gebührt an erster Stelle meinen beiden **Doktorvätern** Dr. J.-I.L. und Prof. Dr. P.K.
(First and foremost, I would like to thank my two **doctor fathers**, Dr. J.-I. L. and Prof. Dr. P.K.) (2021-D-39)

Acknowledging participants in this genre was mostly homogenous in terms of reference. Both in English and Turkish acknowledgments, writers tended to address academic members by Title + his/her full name because supervisors, members of the thesis committee, and other teachers were authorities who demanded respect from them. However, the colleagues acknowledged were thanked using their full names or first names as a sign of equality as seen in extracts 3 and 4. In German, supervisors were commonly referred to as "Doktormutter" (doctor mother) or "Doktorvater" (doctor father) (See extract 4). This reflected a unique form of addressing academic authority within the relationship between the student and the supervisor, which was often

[4] All translations in this article from German and Turkish into English are ours.

characterized by a deep and mentor-like connection, combined with a sense of care, support, and responsibility like that of a parent. In addition, Ph.D. students often viewed themselves as being part of their supervisor's academic family tree therefore the expressions “Doktormutter” and “Doktorvater” strengthened that academic lineage.

The high frequency of thanking for academic reasons in the three data sets shows that it is essential and obligatory to thank members of the community for their contribution to the Ph.D. thesis. Another explanation may be that academic work does not belong to a particular writer; it is the product of various types of assistance from several people and the importance of academic collaboration and mentorship in the academic community, regardless of the language.

Acknowledgments are a unique genre in which mentioning personal issues is accepted in an academic work. In the acknowledgments, the Ph.D. students also thanked their families and friends for their spiritual support, unpaid labor of production, and patience during writing the thesis. For these students, writing their Ph.D. thesis is a big commitment concerning time and energy, which requires not spending time with their loved ones (Šinkūnienė & Dudzinskaitė, 2018). Hence, the frequency of thanking them for moral reasons shows that it is also important for them to thank those who support them morally and believe in them.

In our data, the family members most frequently mentioned were parents, partners, and children. There was more significance placed on gratitude to family and friends in the Turkish acknowledgments than in English and German ones. Turkish writers explicitly showed curtsy and love to their loved ones and thanked them explicitly for their support during the burdensome process of writing their theses. This finding may be explained by Turkish cultural norms that emphasize the importance and contribution of family in one’s life. For Scrievener (2009), mentioning family portrays writers as more human and sympathetic. It is also an intrinsic commitment of the writers to their families (Hyland & Tse, 2004).

In the German context, there was generally no substantial disparity in addressing family members. They were occasionally referenced without specifying their names, at times identified only by their first names or mentioned with both their first and last

names (extract 5). Turkish authors commonly used full names when referring to family members and friends, whereas English authors typically addressed them by their first names (extract 6). This difference suggests that Turkish authors tended to adhere to more formal acknowledgment norms.

> 5. Mein ganz besonderer Dank gilt meiner Familie: F., dessen Begeisterung für meine Forschung mich immer getragen hat und meinen Eltern, ohne deren geduldige und großzügige Unterstützung diese Arbeit nicht möglich gewesen wäre.
> (My very special thanks go to my family: F., whose enthusiasm for my research has always carried me, and my parents, without whose patient and generous support this work would not have been possible.) (2021-G-38)

> 6. Thank you to all my friends back home, especially G., who showed me love and remained in close contact during my five-year absence in America. (2018-E-7)

Acknowledgments also reflected thanking the reasons of the Ph.D. students for the institutional support and finances for conducting the research. The support mentioned here ranges from access to data, proofreading of the thesis, and financial assistance. In our data, Turkish writers were mostly grateful to TUBİTAK (a Turkish state institution providing scholarships to scholars) for funding and scholarships (e.g. extract 7). This gratitude included an explicit speech act of thanking because the acknowledgment of funding was phrased according to the officially stated requirements. For Hyland (2004), the detailed explanation of prestigious scholarships is a way of recognizing the writer's academic talents. In the English and German data, the writers also appreciated libraries and institutions for providing access to sources in addition to funding and scholarship. These appreciations were less explicit in the English and Turkish data. However, there is a notable disparity within the German data, exhibiting a distinct emphasis on resource-related gratitude. Our data supports the assertion that research projects in philosophy in Germany often benefited from more significant material or financial resources than those in Turkish and English contexts (extract 8).

> 7. 2015-2016 yılları arasında 2214-A Yurt Dışı Doktora Sırası Araştırma Burs Programı ile Purdue Universitesi'ne yapmış olduğum on aylık ziyaretimi finanse eden TUBİTAK'a teşekkür ederim.
> (I would like to thank TUBITAK for financing my ten-month visit to Purdue University between 2015-2016 with the 2214-A Research Fellowship Program abroad.) (2022-T-45).

> 8. Für die finanzielle Unterstützung bedanke ich mich bei der Staats- und Universitätsbibliothek Dresden, der Technischen Universität Dresden und der Geschwister Boehringer Ingelheim Stiftung

für Geisteswissenschaften. Des Weiteren danke ich D.R. für die mühsame Durchsicht des Manuskriptes.

(I would like to thank the Dresden State and University Library, the Technical University of Dresden and the Geschwister Boehringer Ingelheim Foundation for Human Sciences for their financial support. I would also like to thank D.R. for the painstaking review of the manuscript.) (2021-G-40)

As the second aim of the present study, we investigated the linguistic patterns of usage of thanking in this genre in English, German, and Turkish. Our data analysis on the lexical and grammatical patterns of thanking in academic acknowledgments across English, German, and Turkish revealed some interesting findings as seen in Table 4. In English acknowledgments, nominalizations were significant at 41% and performative verbs were prominent, constituting 25% of the thanking patterns. In contrast, adjectives (16%) and bare mentions (13%) played comparatively smaller roles in English acknowledgments. In Turkish acknowledgments, performative verbs were prevalent at 59%. Nominalizations, while still significant at 29%, hold a lesser role compared to performative verbs. Compared to English, in Turkish acknowledgments, adjectives, and bare mentions were used less frequently, both at a rate of 5%. Similar to Turkish, in German acknowledgments, performative verbs took a dominant position at 46%, emphasizing direct gratitude expression. Nominalizations were prominent at 30%, but still less prominent than in English. Adjectives (20%) were used less frequently in German acknowledgments. Interestingly, bare mentions were applied at a rate of 18%, which was more frequent than those in Turkish and English. Passive voice usage for expressing gratitude in academic acknowledgments was not employed frequently across all three languages, with English (5%), Turkish (2%) and German (1%) exhibiting relatively low percentages.

Table 4

The linguistic patterns of thanking

	English		Turkish		German	
Linguistic Patterns of Thanking	f	%	f	%	f	%
Nominalization	100	41	56	29	122	30
Performative verb	166	25	112	59	191	46
Adjective	66	16	9	5	20	5
Passive	19	5	4	2	6	1
Bare mention	55	13	9	5	72	18

Following procedures by Hyland and Tse (2004), we calculated the frequency of verbs and nouns in English Ph.D. acknowledgments as overt expressions of gratitude. Ph.D. students relied heavily on performative verbs marked by the use of "thank", "owe" and "acknowledge". The verb "thank" was observed at a frequency count of 148. As for Gesuato (2008, p. 1), "thank" displays "a favorable feeling towards the benefactors", as shown in (9) and (10) while "acknowledge" - in (11) - indicates "benefactors' merits".

9. **Thank you** for your insight and critical comments. (2020-E-29).

10. **I would like to thank** the US-Germany Fulbright Commission and Dr. N. for supporting my research in Kaiserslautern (2018-E-5).

11. **I would like to acknowledge** the teachers I had before arriving at my doctoral program as well (2019-E-13).

12. **I owe** a debt of gratitude to P.F. for his helpful written and verbal comments on my work. (2020-E-28).

In the data, half of the performative examples observed were the examples of weakening the illocutionary force of thanking through the use of an introductory phrase before the main verb, which diminished the force of thanking (See extracts 10 and 11). The introductory phrases included mostly a modal and a mental state verb. The acknowledgments in English mostly contained a formulaic preface mitigating the writers' inclinations usually with the pattern of "I would like to". Hyland and Tse (2004, p. 269) explain this formulaic use of hedging (would in our case) by "the relative power imbalance between acknowledger and acknowledgee in these cases and to the desire of students to avoid imposing a debt on those they thank". The employment of a hedging modal lessens the threat of the addressee by emphasizing the writer's inclination to thank rather than perform an obligatory act of thanking.

"Thanks" and "gratitude" were the two nouns observed in the English data as a means of thanking. In (14), the writer conveyed his pleased acceptance of the scholarship offered.

13. **Thanks** especially to my wife, Kaylyn, for her enthusiastic love and her relentless reminders on the importance of using philosophy to help those outside of the ivory tower. (2020-E-25)

14. **My gratitude** also extends to the Irish Famine Memorial Fund as a scholarship recipient (2022-E-47)

As illustrated in (15), the most common adjectives used in the English acknowledgments were "grateful" and "indebted to". The use of passives did not seem to be frequent. This syntactic structure is a way of expressing gratitude implicitly. Since acknowledgments are an explicit way of expressing gratitude, passives may not be preferred frequently in this genre. Extract 17 is an example of bare mention, which is another strategy of removing the writer. For Hyland and Tse (2004, p. 267), passives and bare mentions are "the low-key ways of expressing gratitude".

15. The list of folks I am intellectually **indebted** to is vast ... (2022-E-41).

16. None of this **would have been possible**, or worthwhile, without her. (2019-E-18).

17. Lastly, **without the awesome people** who helped me in the philosophy department, I probably would not have survived these last few years. (2018-E-8).

Unlike the English data, the vast majority of the patterns of gratitude in Turkish acknowledgments contained verbs (18 and 19) and nouns (20 and 21), as seen in the examples.

18. Kıymetli üstadım ve değerli dostum F.Ç.A.'a kendi tezi gibi titizlikle emek sarfettiği için **teşekkür ederim**.
(I would like to thank my esteemed master and dear friend F.Ç.A. for working as meticulously as he did for his thesis.) (2022-T-47)

19. … ve Prof. Dr. M.S. S.'a **teşekkürü bir borç bilirim**
(… and Prof. Dr. M.S. I owe a debt of gratitude to S.) (2022-T-49)

20. Bu çalışmayı yöneten ve doktora dönemi süresince yardımını, **desteğini ve hoşgörüsünü** esirgemeyen değerli danışman hocam (2018-T-1)

21. Her anımda yanımda olan yol arkadaşım R. Y.'a **şükranlarımı sunarım**.
(My dear advisor, who directed this study and provided his help, support and tolerance throughout the doctoral period) (2022-T-44)

Adjectives (22), passives (23), and bare mentions (24) were not seen at high occurrences in the Turkish data. "Minnettar" and "müteşekkir" -meaning thankful - were the common adjectives observed. In (23), the use of passive disguised the presence of the writer while in (24), through the employment of bare mention, the act of thanking was somehow moved.

22. … koşulsuz sevgileriyle beni motive eden sevgili çocuklara **minnettar** olduğumu belirtmek isterim.
(I would like to express my gratitude to the beloved children who motivate me with their unconditional love.) (2018-T-9)

23. Bu çalışma, birgün bana zamanı enine yaşamaktan söz eden ustam -benim Sokrates'im - M. N.'e **ithaf** edildi.
(This work is dedicated to my master - my Socrates - M. N., who one day told me about living time to the fullest.) (2020-T-27)

24. …. Ne söylesem eksik kalacağını biliyorum.
(I know whatever I say will be incomplete.) (2020-T-24)

Similar to Turkish practices, German acknowledgments differ from English by displaying a higher prevalence of performative verbs. The most frequently encountered verb is "danken" (to thank), while "sich bedanken" is also employed with frequency, whereas "verdanken" (to owe) was employed more sparingly. Performative verbs in German acknowledgments were often accompanied by qualifying expressions and adverbs such as "Herzlich" (cordially), "besonders" (especially), "zutiefst" (deeply), and "sehr" (very much). Moreover, these verbs were commonly employed in modalized forms, including "möchte danken" (want to thank) and "habe zu danken" (have to thank), or in volitive moods expressing structures like "es sei gedankt" (it is to be thanked), which notably represented the only instance of passive usage of the verb "danken" within our German data. In parallel with performative verbs, nominalizations such as "Dank" and "Dankeschön" were frequently coupled with qualifying expressions and adjectives, such as "besonderer" (special), "erster" (first), "allererster" (very first), "groβer" (great), "größter" (greatest), "innigster" (most heartfelt), "verbindlicher" (obliging) and "herzlicher" (cordial). Although the array of adjectives and adverbs in the German thank pattern was not exceptionally extensive, it was employed with precision. These qualifications collectively attempted to characterize the act of expressing gratitude as a personal and heartfelt gesture, reflecting a genuine sense of appreciation rather than a mere ritual or formality.

Furthermore, nominalizations in German acknowledgments were often combined with verbs. Frequently encountered combinations in our data were: "Dank gelten" (thanks are given), "Dank gebühren" (thanks are due), "Dank schulden" (owe thanks), "zu Dank verpflichtet sein" (be obligated to thanks), "Dank aussprechen" (express thanks),

and "Dank widmen" (dedicate thanks). Less frequently encountered combinations involved phrases such as "mit Dank verbunden sein" (be connected with thanks), "Dank / Dankbarkeit geht an" (thanks / gratitude goes to), "Dank/Dankbarkeit ausdrücken" (express thanks / gratitude), "Dank sagen" (say thanks), "Gefühl der Dankbarkeit empfinden" (feel a sense of gratitude), and "in Dankbarkeit verbleiben" (remain in gratitude). Koller (2001, 291) argues that in the case of nominalizations such as “Dank schulden” (owe thanks) and “zu Dank verpflichtet sein” (be obligated to thanks), connotations of indebtedness and obligation underscore fundamental psychosocial attributes of expressions of gratitude, particularly within the context of German culture.

Passive adjectives were not observed frequently in the German acknowledgments. However, bare mentions, which entail expressing gratitude without explicitly using phrases of "thanks" seemed to be more common in our German data compared to English and Turkish as exemplified in (26).

> 25. Zuletzt möchte ich meine Großeltern J.-B. und M. M.-M. hervorheben, die mir zum größten Teil meinen bisherigen Lebensweg überhaupt ermöglichten.
> (Finally, I would like to mention my grandparents J.-B. and M. M.-M. who for the most part made my life path possible to date.) (2019-G-14)

A reason for the frequent use of bare mentions could be giving the acknowledgment a more personal touch. Such an approach can create a sense of gratitude that extends beyond mere ritual or formality, contributing to a more intimate and heartfelt expression of thanks.

The last aim of the study was to give a clear picture of the authorial subject pronouns in the three contexts. Interestingly, we observed an extensive utilization of authorial pronouns in subject position in the English, German, and Turkish data, which contrasts with the impersonal nature of Ph.D. theses. Table 5 shows the distribution of authorial subject pronouns in the three contexts.

Table 5

Subject types in acknowledgments

	I / my		none		no author		the author	
	f	%	f	%	f	%	f	%
English	291	59	102	21	100	20	0	0
Turkish	126	90	4	3	10	7	0	0
German	310	67	56	12	98	21	0	0

The use of authorial subject pronouns in Turkish had a high percentage while the other categories had small percentages, which proved that Turkish Ph.D. thesis writers employed limited means of authorial subjects and had a strong stance with the use of I subject pronouns. In the English data, we observed an opposite trend. Ph.D. thesis writers made use of different authorial subject pronouns in the acknowledgments. As the strongest means of mitigating stance, the usage of I/my comprised 59 %. None author and no author category nearly shared the same percentages. The author category was found in none of the data sets.

The Ph.D. students usually tended to be more objective and impersonal to diminish the risk of being rejected by their supervisors and the thesis committee. However, they opted for a more personal style in the acknowledgments of their Ph.D. theses in the three contexts, which is consistent with Hyland (2011). Our findings were also in line with Hyland and Tse (2004) who observed the significant use of authorial pronouns in MA and Ph.D. theses. The Ph.D. writers did not want to distance themselves from their gratitude. Ph.D. theses are the keys to gaining membership in an academic community. Thus, in all three languages, Ph.D. students might prefer to set up a bond with their acknowledgees through genuine thanking including first-person subject and object pronouns I and me, and the possessive adjective my, as seen in the below examples in the three contexts.

26. **I** want to express **my** gratitude to my committee members (2018-E-7)

27. Doktora eğitimimin ders aşamasından itibaren **bana** karşı götermiş olduğu olumlu ve yapıcı tavrından, aynı zamanda bu tezin oluşturulmasında sunduğu katkılarından dolayı sevgili tez danışmanım Prof. Dr. H.B.'ya öncelikle içtenlikle teşekkür **ederim.**
(I would like to sincerely thank, my dear thesis advisor, Prof. Dr. H.B., due to the positive and constructive attitude he has shown towards me since the course stage of my doctoral studies, as well as his contributions to the creation of this thesis)

28. Sehr dankbar bin **ich** auch Herrn PD Dr. J.H., der das Zweitgutachten verfasst hat. (I am also very grateful to Adjunct Professor Dr. J.H., who wrote the second report.) (2019-G-14)

According to Koller (2001), the authors of acknowledgments are faced with the challenge, where they must delicately handle "I" to avoid excessive self-focus. Hence, they often tend to emphasize the acknowledgee or the reason for thanking. This style was rarely found in the Turkish data due to the linguistic patterns of the Turkish language, which is an agglutinative language. In Turkish, the subject can be understood clearly from

the verb and many acts of thanking include the first-person subject pronoun added to the verb as an affix. Not all the acts of thanking included explicit authorial involvement in English acknowledgments. Through the use of non-author confronted linguistic patterns—mainly the passives and ellipsis—the English writers disguised their presence from the acknowledging process and created a more formal style, as seen in the below extract (30). Our analysis revealed that the German writers exhibited a trend similar to the English writers. The writers of German acknowledgments applied various techniques to create an emphasis on modesty, as illustrated in (30) and (31). These strategies included the use of the volitional subjunctive ("gedankt sei" -thanks is to be given) and nominal expressions ("der Dank gilt"-thanks goes to). The withdrawal of the acknowledger is also achieved by placing adverbials or adverbial phrases, such as 'last but not least' at the beginning of the sentence as seen in (31). In this extract the usage of the English phrase 'Last but not least' in a German sentence demonstrates a translanguaging practice; although it is not within the scope of our research it underscores the prevalence of English phrases in the German language.

29. A special thanks goes to E. K. (2018-E-3)

30. Ein groβes Dankeschön geht auch an alle meine Freundinnen und Freunde.
(A big thank you also goes to all my friends.) (2020-G-24)

31. Last but not least ein herzliches „Danke schön"an J.L. für das Korrekturlesen.
(Last but not least, a big "thank you" to J.L. for proofreading.) (2018-G-2)".

In the case of no author preference, writers mention, "the assistance of the addressee without expressing thanks" (Hyland & Tse, 2004, 272). The Turkish writers who mostly tended to adopt a more impersonal style did not prefer this style of thanking. They did not distance themselves from the act of thanking and attributed the thanks to an impersonal agent. They took responsibility for any imposition on the addressee or potential face violation. However, this preference was marked in the English data with a percentage of 20. In (32) and (33), we see the writer's attempts to give explicit credit for the help and support received in the English and German acknowledgments.

32. It would be very hard to overestimate her influence on my work (E-2018-4).

33. Herr Prof. Dr. P.O. hat sich freundlicherweise bereiterklärt als Fachfremder den Vorsitz des Prüfungsausschusses zu übernehmen.

(Prof. Dr. P.O. has kindly agreed to chair the examination board, despite being from a different academic field.) (2020-G-25)

For Hyland and Tse (2004), acknowledgments are communicative parts of academic texts. Here, the writers represent themselves more freely without following the linguistic conventions of their academic communities. The frequent use of the subject pronoun I is an indication of this freestyle rather than the explicit and strong authorial stance usually taken in marshalling arguments in academic genres. The explicit authorial involvement reflects the writers' attempts to set up a genuine writer-reader relationship. However, it becomes apparent that the writers of Ph.D. acknowledgments in English and German theses make efforts to balance self-expression and demonstrate modesty in the genre of acknowledgments.

Conclusion

Acknowledgments are a unique academic genre that conveys deeply personal expressions of gratitude of the writers to the people who help and support them. They hold a significant role in scholarly communication, enabling researchers not only to express gratitude but also to contemplate their academic journey and identity. Although they seem to be impersonal, they follow cultural and discipline-oriented conventions reflected through the employment of certain linguistic patterns. As noted by Sandig (1997), acknowledgments constitute the “building blocks” of individualized compositions and play a significant role in shaping individual pieces of writing relying on basic textual structures as their foundation.

The aim of the present study was to uncover the reasons for thanking and the linguistic patterns of thanking in acknowledgments. Compiling a corpus of Ph.D. theses acknowledgments written between 2018 and 2022 in the field of Philosophy in English, German, and Turkish, we intended to figure out the specific features of acknowledgments. We found that the act of thanking was mostly based on academic purposes, following moral ones in the three contexts. Thanking for resources was the least frequently employed reason for thanking. In the English and Turkish acknowledgments, usage frequencies of performative verbs were identical, followed by nominalizations. On the contrary, in the German data set, nominalizations were the distinctive linguistic patterns. As indicators of implicit gratitude, passives, and bare mentions were not common in the

English and Turkish acknowledgments but there is a tendency to utilize bare mentions as a pattern of gratitude in the German academic culture, showing that taking a humble stance for gratitude might be a linguistic norm in this culture. In all three cultures, the employment of "I" subject pronouns for thanking was identical. Overall, our analysis revealed nuanced linguistic variations between English, German, and Turkish acknowledgments, rooted in cultural and linguistic differences.

Our findings have shown that acknowledgments are not only checklists of useful people or institutions; they serve a more profound purpose. Acknowledgments provide writers with a platform to reflect on the procedures and practices that contributed to the completion of their dissertations, thereby allowing them to project a competent and professional identity (Hyland, 2004). To enhance the effectiveness of acknowledgments, we propose that scholars teaching academic writing should recognize this genre as a distinct academic genre. By doing so, instructors can raise postgraduate students' awareness of the cultural and disciplinary conventions of this genre, especially when their own lingua-cultural background requires different conventions in acknowledgment writing compared to the conventions of their academic studies. This approach would encourage students not to perceive acknowledgments merely as a formality but as a powerful means to convey their competence and appreciation for the academic community.

The study is limited by a lack of information on the generic features of all academic genres, such as books and research articles that include acknowledgments. Further research focusing on the comparison of different genres and cultures may give us a more detailed picture of these features. The study may also be repeated in different lingua-cultural academic contexts to provide more comparisons between different contexts to identify other cross-cultural linguistic norms in the genre of acknowledgments.

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IDIOMATIC SPACE OF ANTHROPOSEMIC SUBSTANTIVAL BAHUVRIHI WITH A ZOONYM COMPONENT AND ITS SEMANTIC MODELLING IN MODERN ENGLISH

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Abstract

The article considers the versatility in perception of a person's appearance and streaks of character through the phenomenon of bakhuvrihi with a zoonym component according to conceptual pattern: OBJECT (ZOONYM) → HUMAN / PART OF THE HUMAN BODY, where ZOONYM acts as a conception referred to by a word, and HUMAN / PART OF THE HUMAN BODY – a conception recognized as a target. This study focuses upon the new integrated approach to the anthroposemic substantival bahuvrihi with a zoonym component in the cognitive and semantic perspectives. The choice of such bahuvrihi is justified by the fact that the "zoonym-words" are perhaps the most proliferous lexical source of the items with positive / negative connotation, firmly based on traditions in specific cultural contexts and are traces of mythical thinking. Idiomatic space of anthroposemic substantival bahuvrihi with a zoonym component appears to be a complex structure of knowledge about humankind in biological, mental and social dimensions.

Keywords: nominative space, idiomatic formations, metaphor, metonymy, synecdoche, positive connotation, negative connotation

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Modern linguistic research represents language not just as a system, but as a versatile phenomenon in which the decisive role belongs to human. Anthropocentrism is one of the most prominent characteristics of the human state of mind and social consciousness. Permeating all spheres of human spiritual life, anthropocentrism reflects the process of human awareness of their status in nature and society. Principles of anthropocentrism in its evolution are expressed in the philosophical views, moral values and linguistic concepts of such scientists as Humboldt (1984), Benvenist (1974), Motoki (1983), and others.

Along with the modern cognitive-discursive paradigm, one of the characteristic features of which is the strengthening of the anthropocentrism of linguistic explorations, the human factor acquires special significance for linguistics (Langacker, 1987). For this reason, this paradigm focuses on the nominations of various spheres of human life, especially humans' proper names. Such vocabulary is a subject of a multifaceted analysis. One of the most elaborated parts of the English lexicon is the subsystem of names of persons, which reflects the diverse understanding of humans in their relations with the physical and social world (Turner, 1991; Andrusyak, 2003, p. 206). Names of persons in the lexical-semantic system of modern English form a specific class of lexemes called substantival composites-bahuvrihi, most popular of which are anthroposemic bahuvrihi as such that characterize a human (Chuban, 2017; Vasylyeva, 2006). However, in Old English and in Middle English proper names in the form of bahuvrihi were widely used, mostly surnames and nicknames, which were interpreted according to the formula "one who has…" (Gibbs, 1999, p. 387): *Fairlok* (OE fæger "bright", OE *locc* ("hair curl") "blond man" (Gibbs, 1999, p. 22); *Brightwyt* (OE berth "bright", OE *witt* "mind") "intelligent man" (Gibbs, 1999, p. 15) and so on. And as common nouns, anthroposemic noun composites-bahuvrihi practically did not function in the English language until the 16th century. Such tokens began to appear in the American area in the eighteenth century (Gibbs, 1999).

Initiated by H. Marchand in 1969, a worldwide interest to the study of bahuvrivi prompted many linguists from different countries, including Ukraine, to analyze this phenomenon in more details. The contribution of Ukrainian scholars, both Soviet and post-Soviet, can be viewed from two perspectives, mostly within prof. L. Omelchenko's linguistic school: (i) those for whom the study of bahuvrihi happened to be only a constituent part of their research in, for instance, word-formation [compounding] (Kveselevych, 1983;

Polyuzhyn, 1999; Levytskyy & Sheludko, 2009; Omelchenko, 1989; Onyshchenko & Yanovets 2020; Kraynyak 2001 and others), lexical vocabulary (Andrusyak, 2003; Gonta, 2000; Omelchenko et al., 2010) or nomination (Dembovska, 2012; Omelchenko at al., 2010), and (ii) those who focused exceptionally on the study of bahuvrihi either making a brief overview of these composites (Chuban, 2017; Omelchenko, 1985; Talko, 2020), their classification (e.g. Silin 1996; Vasylyeva, 2006 and others), or their semantic, stylistic, functional/pragmatic and cognitive specifics (e.g. Talko, 2020; Vasylyeva, 2006).

Based on the tendency to anthropocentrism, the units we study cover only a small link in the branched chain of variability of values. The choice of bahuvrihi with the zoonym component is justified by the fact that the semantic value of zoonyms is the ground for conceptualization within traditions in a particular cultural environment and includes a depiction of human appearance and characteristics of moral qualities, social behavior, and the expression of a positive, negative or neutral attitude towards a particular person. Zoometaphors and comparisons, in which a person is assessed by the appearance, character or behavior of an animal in modern English, are aftermaths of mythical thinking and ancient mythical ideas, as noted in the works of Geertz (2004), Levi-Stross (1985), and Turner (1991). Fauna has accompanied humanity since the beginning of its existence on our planet and is in close contact with it.

Anthroposemic substantival bahuvrihi with a zoonym component (ASBZC), in particular, received only partial theoretical coverage in the works of different linguists (Marchand, 1969; Carr, 2000; Vasylyeva, 2006, etc.), but even in this case these linguistic units were mostly subject to the analysis in terms of lexical semantics, but for Vasylyeva (2006) who made a cognitive analysis of bahuvrihi lexemes. Yet, focusing on classifying LSG subgroups, bahuvrihi with a zoonym component were left beyond the scope of her study, excluding a few mentions of (i) such an LSG that includes 'the names of objects of the animal world' (Vasylyeva, 2006, p. 135) and (ii) a conceptual metaphor HUMAL IS AN ANIMAL (ibid., p. 186–187). So, it seems motivating to find out how a nominative space (cf. Yastremska, 2021) of anthroposemic substantival bahuvrihi with a zoonym component appears as a complex structure of representation of knowledge about human being in biological, mental and social dimensions, on the one hand; and how it explains the topicality of this study within conceptual analysis and semantic modelling, which may

be relevant in the areas of conceptual semantics, lexicology and translation studies, on the other.

Therefore, the aim of this research, based on the assumption of anthropocentrism, is to analyze the anthroposemic substantival *bahuvrihi* with a *zoonym* component to specify the mental basis for recognition of the "objective" characteristics of referents. The task of this study is to show the versatility in perception of a person's appearance and traits of character through the space of bahuvrihi with a zoonym component according to conceptual pattern OBJECT (ZOONYM) → HUMAN / PART OF THE HUMAN BODY. Due to this task, the following section of the paper identifies the domain and target concepts related to the topic of investigation in cognitive and linguocultural perspectives. The subject of our research is semantic and cognitive (conceptual) perspectives of anthroposemic substantival bahuvrihi with a zoonym component (further referred to as ASBZC); while its object is ASBZCs.

Methodology

As has been mentioned above, the aim of this study is to show the versatility of the perception and evaluation of physical appearance and character traits as reflected in the bahuvrihi zoonymic components, to find cognitive basis of expressing meaning through metonyms formed according to the schema '*X FOR Y*': OBJECT (ZOONYM) → HUMAN / PART OF THE HUMAN BODY, where ZOONYM acts as a conception referred to by a word, and HUMAN / PART OF THE HUMAN BODY – a conception recognized as a target. These include common names like *lion-heart*, which are exocentric complex nouns with a complex onomasiological feature and explicitly expressed onomasiological basis, which call a person by a dominant feature and have a possessive character.

ASBZCs form in modern English an extensive system of personal names on physical, physiological and social grounds. Determining the reference of a particular compound means modifying and importing most of specific information [expressed by a compound], which may metonymically or symbolically refer to certain phenomena categorized in the human model of the world on the basis of their prominent, relevant features (cf. Langacker, 1987, p. 15). In addition to knowledge related to human existence, the creation of ASBZC involves a wide range of experiential knowledge concerning highly disputable objective external and internal properties of fragments of the surroundings and the relationship between them.

To conduct the research, we used the following methods: the descriptive method made it possible to identify the studied units and carry out their classification and interpretation, the method of semantic analysis made it possible to determine the lexical and semantic features of the considered units. The semantic features of the components determine the type of internal valence bonds that are established between them in the structure of components. These connections form partial semantic models within the established structural-semantic models, according to which ASBZC are formed in modern English. So, the method of componential analysis made it possible to recognize "objective" characteristics of referents, which, by means of qualitative evaluation method, were analyzed by the type of evaluation marking (positive, negative or neutral) in the semantic structure of the analyzed units. The method of linguistic modelling is used to classify anthroposemic substantival bahuvrihi with a zoonym component according to the motivational semantic model OBJECT (ZOONYM) → HUMAN / PART OF THE HUMAN BODY. Quantitative analysis allowed to establish the productivity of the creation of ASBZCs.

The source base of the research is the materials of explanatory, etymological dictionaries of the English language: The Barnhart Dictionary of Etymology (Barnhart, 1998); Thesaurus of Traditional English Metaphors (Wilkson, 1993); electronic resources: (ABBYY Lingvo, X.3). The research corpus is comprised, by sampling (probability sampling method), of aforementioned dictionaries, totaling 240 lexical zoonymic items, irrespective of the type of their graphic representation, with 30 ones analyzed in the text of this article.

Results and Discussion

Anthroposemic bahuvrihi in English consists of several components, characterized by stability and idiomaticity, because their meaning is not recognizable as the sum of conventional meanings of their component words. It should also be noted that such idiomatic formations have a peculiar semantic value as they mostly arise on the basis of METAPHORIC thinking.

Bahuvrihi as a term is borrowed from ancient Indian linguistics and poetics. The word *bahuvrihi* is a composite noun which consists of two parts: *bahu* (abundant) and *vrihi* (rice), and literally means 'rich in rice' (an ancient Indian word referring to a rich man). Consequently, this term relates to the names of people formed on the basic

associations inspired by observations of certain aspects of a referent, such as physical appearance, dressing style, etc., and highlighting their most prominent characteristics. In the twentieth century, it was actively used by scholars in Western countries, and *bahuvrihi* were proved to function in many modern languages, including Ukrainian, English, and German.

Anthroposemic substantival bahuvrihi with a zoonym component or ASBZC is represented by a compound word formed by a combination of mostly two components, the first of which is a zoonym, and the second is the name of a human body part, organ or quasi-organ (e.g.: *birdbrain, lion-heart*). For sure, the definition above describes ASBZC in terms of zoosemiotics (see J. Deely's Umwelt phenomenon (Deely, 2021)). Yet, if one takes into account that function of the the second component is to metonymically indicate the implicit onomasiological basis, where the object of the nomination is a person, then it allows us to assume that metonymic relations are based on reflection, so a sign here is viewed as a tool of reflection, which marks its anthroposemic nature (cf. Deely, 2021). Within the model of cognitive grammar presented by Langacker (1987), the metonymic technique of reference of the PART FOR WHOLE type (synecdoche) can be explained in terms of cognitive focus shifts, when, illuminating the PART, it is perceived as the WHOLE.

Due to the fact that bahuvrihi concisely and economically convey meaning, they serve as an expressive means of expression of an object, phenomenon, reference to an object, animal, person, etc. In view of the above-mentioned facts, it is necessary to take into account the "objective" characteristics of referents when translating. The greatest variability in the use of translation transformations is typical of the translations of English ASBZC via different translation techneques, such as transcoding, tracing, generalization, concretization, modulation, and descriptive translation, applied to render the initial meaning of the lexical item of the herein discussed category. The lexical meaning of ASBZC involves heterogeneous conceptions from many fields, so it is necessary to recognize in each case the cognitive context when interpreting the meaning of linguistic units. In most cases, cognitive contexts of ASBZC's involve notions of common phenomena in the world at large. However, a number of composites require encyclopedic [multidimensional and comprehensive] knowledge for interpretation.

The conceptual content involved in the English ASBZC, is reflected in the conceptual background of the lexeme *human*, which involves knowledge about human

beings, including their multifaceted relations with the natural and social environment. The characteristics of a person can be represented in the following aspects: a) biological-physiological and anthropological, i.e., natural properties (sex, age, nationality, physical characteristics – height, weight, appearance); b) social and labor, family relations (human-to-human relations / relations of a person to other persons, labor, property, social, political, religious and other institutions and organizations, the place of residence, etc.); c) the sphere of mental activity and emotional evaluations (ability to think, as well as having free will, imagination, emotions, attitudes, morality, etc.) is part of the conceptions represented by the terms for both innate and acquired mental properties and characteristics. At the level of language, these types are codified by corresponding lexical and semantic groups (further referred to as **LSG**), such as, LSG "human as a biological being", LSG "human as a mental being" and LSG "human as a social being" (cf. Vasylyeva, 2006). Let us analyze these three types of LSGs in more detail (see also Table 1 below).

LSG "human [man] **as a biological being"**: in this group, most of ASBZCs characterize the physical appearance of a human because it is one of the capacious and complex sources of information on which people base their judgments about each other. In language, it is reflected in the semantics of a wide range of units that interpret information coming through the visual channel (Gibbs, 1993, p. 165). This includes such a subgroup as the general aesthetic assessment of appearance: *weasel-faced* "a face of grace (a person resembling the elongation of certain facial features to grace)"; *beetle-browed* – a person with "eyebrows of a beetle (about a man with thick, drooping eyebrows)"; *hawk-nosed* "eagle nose". Quite original is the English metaphor for a man whose face is framed by hair or sideburns: *frilled-lizard man* "lizard with frills". ASBZC specifying the general aesthetic estimation by means of a zoonym component are not frequent.

Much more often, certain details of human appearance come to the fore, such as: figure, e.g., *duck-butt* "short man, especially with large buttocks"; neck size and shape, e.g., *bull-necked* "man with a thick, short neck". These metaphors can be both positive and negative. Positively colored are those which describe "human neck", e.g., the English metaphor *pigeon-necked* "pigeon's neck" which refers to men who have a neck with a pronounced physiological thickening in the middle; or *swan-neck* "about beautiful and

thin neck"; as well as "human waist" because a thin waist is one of the standards of English beauty, e.g., *wasp-waist* – an extremely slender waist, "aspen waist (about a very thin waist)". Whereas negatively colored are often those which refer to “human feet” in English, e.g., *duck-legged*, *duck-footed*; *harefoot* "long-legged pearson"; *cow-footed*; *cock-footed* "rooster feet"; *pigeon-toed* "with very thin legs".

LSG "human [man] **as a mental being** [reasonable creature]**"** is mostly marked by negative connotations, and in the majority of cases it is represented by (i) ‘memory and attention’ subgroups with such lexical items as *birdbrain* "a person who constantly forgets something", "one who cannot keep their attention on anything for long"; *cook-brained* (rooster's brain), *sparrow-brain* "about a silly person", *hare-brained* "reckless, careless"; *pigeon-headed* "about a silly person", *cat-eyed* "attentive"; (ii) ‘tendency to reinsure’ subgroups: *cat-footed* "quiet, cautious person", *pussyfoot* "careful person"; and (iii) ‘pride, arrogance’ subgroups: *pigeon-chested* "pigeon's breast (about an arrogant man)"; *cook-chested* "the chest of a rooster (about an arrogant man)". The motivational trait ‘timid’ is represented by English metonymical constructions – *rabbit-hearted* "about timid person"; pigeon-hearted "timid person".

LSG "human [man] **as a social being"** reflects social parameters with a neutral assessment in various areas of professional activity, in other words, being part of society, a person is involved in various relationships with other members. Here belong such ASBZCs as *cat-skinner* "tractor driver", *frogman* "diver", *bullneck* "engineer, soldier digging trench"; *horseman* / *horsewoman* "rider"; *dogface* "infantryman, recruit, private" and others.

Table 1

Metonymic transfer of meaning in the antroposemic substantival bahuvrihi with zoonym component. Quantitative data.

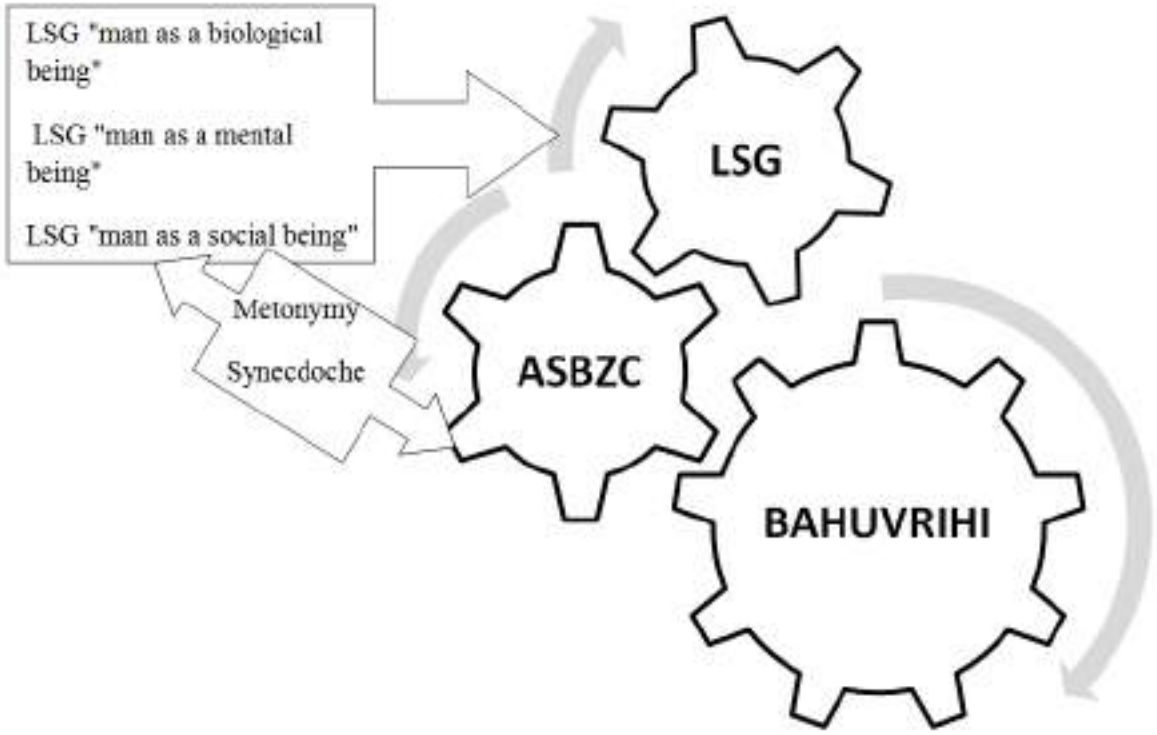
Lexical and Semantic Field	**Zoonyms**		
Semantic Value	+ positive	– negative	0 neutral
LSG "human as a biological being"	2	13	–
LSG "human as a mental being"	0	9	–
LSG "human as a social being"	–	–	6

A study of the research corpus proves that metonymy is widely used in ASBZCs to put across negative meaning (see Table 1 above). Thus, the conceptual structure of ASBZCs can be reduced to a configuration that forms a frame network – as understood in the theory of frame semantics (Zhabotinskaya, 1999; Andreou & Ralli, 2015; etc.) – the part of which is the conception of a possessive frame (Andreou & Ralli, 2015, p. 163-185). In this study, we consider compounds whose lexical design involves synecdoche.

Semantic processes in ASBZCs are based on two assumptions: a) partitive (synecdochal) tokens include only those that are conceptually represented by partonymic frames (conceptual structures in which two or more entities are connected by the predicate *have* and realize the relation 'from WHOLE to PART'), and b) metonymic units verbalize other types of possessive structures (see Figure 1).

Figure 1

Schematic representation of semantic processes in the antroposemic substantival bahuvrihi with zoonym component. Qualitative data (Own processing).



Metonymy is defined as a universally shared cognitive strategy allowing for expression and comprehension of extensive meaning via compact form (Khishigsuren & Bella, 2022), as “a deeply organic turn of the same content in a slightly different plane” (Taylor, 1995). All relations of conceptual contiguity, which provide the basis for

metonymic transferences, are either relations of coexistence based on the synchronous existence of their components, or sequence relations based on spatial, temporal or logical concordances (Struhanets, 2018). In this case, the metonymy conceptions do not necessarily have to be adjacent in the spatial sense.

Metonymic reference presupposes a relevant aspect of an entity named so as to represent the whole entity (Radden & Kovecses, 2007, p. 335-359). Thus, the metonymic process depends on the individual's knowledge of the world and various associations. It should be noted that linguistic meaning is expressed and understood against the discourse participants' background of mental context or, in other terms, metapragmatic awareness or the so-called life philosophy of common sense.

The recognition of constituent aspects [that can be actually or mentally "disassembled and assembled"(Lakoff & Johnson, 1999)] of a conception primarily construed as a gestalt seems to be at issue. Such an "embodied" understanding of the environment is realized in a relatively small set of basic image-schemas; the recognition of schemas in the structure of the world at large is part and parcel of human cognition and orientation in the reality (Geeraets & Cuychens, 2010). Image-schemas are interpreted as skeletal gestalt structures of human experience (Garcia-Valero, 2019). They are mental images, simpler than conceptions of specific categories (Turner, 1991). Each of them applies the schemas of kinetic capacities of a human, which are familiar and understandable to the humans and which they thus easily transfer to the surrounding reality (Fillmore, 2003).

Among the images-schemas, it is the image-schema PART – WHOLE that stands out, while the construction of the WHOLE from PARTS in a certain configuration and the integrity of the parts manifests the fact that the separation or permutation of PARTS leads to the "destruction" of the WHOLE.

The image of the human body as a set of interconnected "details" allows the use of the name of a PART to denote the WHOLE, i.e., the reference to a person, realized in partitive (synecdochal) ASBZC via the name of their organ or body part. The possessive (actually metonymic) ASBZC can be interpreted as an extension of the application of this image-schema not only to a human as an individual, an entity construed on an individual basis, but to a human in relation to the surrounding reality. A human, like all living beings, is not a self-sufficient, environmentally independent natural entity. They function as part

and parcel of the reality that surrounds them in everyday life. The concept of human being is associated with concepts that relate to the physicality and physiology of a human, as well as their abilities, their movements and actions, and finally, objects (artifacts) that they create (Fei, 2020), such as clothing, household items for everyday use, tools and implements that become an integral part of human life, acquiring figurative and symbolic meaning, often associated with certain characteristics.

Conclusions

Thus, metonymy acts as a regular factor in creating the meaning of the considered type of compounds, which determines the core of the constructional pattern, which structures the conceptualizations represented by ASBZC's, i.e., their semantic perspective. In the formal aspect, the core of the constructional pattern is marked by the second component of the compound, which provides access to the implicit onomasiological base. The action of metonymy may be accompanied by the action of metaphor. Both cognitive strategies are decisive for the formation of the conceptual-semantic structure of ASBZC, and also serve as a basis for the interpretation of the analyzed lexical units, outlining the to the cognitive context necessary for understanding the linguistic meaning.

We can conclude that the nominative space of ASBZC appears to be a complex structure of representation of casual knowledge about a human being in biological, mental and social dimensions, the model of which is presented as a composition of LSG groups of different degrees of generalization. Therefore, we consider it expedient to continue the analysis of the conceptual representation of ASBZC, determining in what ways metaphor, metonymy and synecdoche are involved in their creation and interpretation. Also, the ASBZC further research seems to be relevant to typological and comparative investigations, which can be of particular practical value for translation studies. Moreover, the subsequent findings can be applied in teaching as the focus on "bahuvrihi" approach in understanding a foreign language may foster the development of students' linguistic skills as well as their creativity.

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