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# Letter from the Editor

*E lawe i ke a'o a mālama a e 'oi mau ka na'auao.*[1]

This 'ōlelo no'eau most generally translates to "take what you have learned and apply it and your wisdom will increase." Much like our mission statement, Hohonu provides an avenue for all of us to learn something new, make connections, reflect on what we know, and apply new knowledge acquired. Gather the wisdom of our ancestors and hold them dear, for they are the foundation for our successes and our existence today; without our ancestors, we would not be here. Learn from the past, to better the future, and create new knowledge today.

Furthermore, this 'ōlelo no'eau not only applies to individuals, but also to the broad range of groups of people, nations, and countries of all shapes and sizes. Diversity should be a tool used to move forward. We can only grow wiser once we learn to collectively apply the knowledge we have to the current time, to the "now". We are on this journey together, never alone. We need to better learn how to reach out to one another and see that some of the greatest gifts of life are friendships, relationships, and connections; as in most cases, our paths will somehow cross again and those connections rejoined. The strength of our inter- and intra-relationships influence how success is attained and how tribulations are overcome. So if one falls, the rest will too and if one succeeds, so will others.

The success of this journal is credited to the numerous hours of work put in by the 2011-2012 Hohonu staff: Krista Aoki, Jean Ku'ulei Bezilla, Christina Blakey, Edward Bufil, Jamilia Epping, Tiffany Epping, Evelyn Moos, and Ryan Rosenberg, along with our wonderful faculty advisor, Dr. Kirsten Mollegaard. Dr. Mollegaard, your guidance and presence are greatly appreciated. Our 'ohana has definitely grown together throughout our editorial journey and I truly thank you all for your unselfish support, advice, time, and work. Ua 'auamo 'ia maoli nō ke kuleana e kākou! I would also like to take this time to thank Ellen Kusano, Lai Sha Bugado, Ivy Losh, and the rest of the gang in Campus Center for your support to our organization. Thank you also to Susan Yugawa and Erynn Tanimoto in the Graphics Department for your patience and time in the publishing process. Thank you to the It Department as well, for assisting us with our website. Thank you to BoSP and the other CSO's for your support as well! Thank you Kapena Alapai for your beautiful interpretation of our cover art theme (see "About the Cover Artwork" section). Most of all, thank to the authors who took a chance to have their work published in the 10th volume; without your bravery and cooperation, there would be no journal. Lastly, I would like to honor the founders of Hohonu, Alicia Cuttrell, the late Andy Gramlich, and Kalyan Meola, and thank them for the foundation of what Hohonu has come to be today.

If at all, please read what the authors have written, take their knowledge, their opinions and see where it fits within your own thinking, your own worldview. Reflect on the state of the world, the state of your well-being. Make connections that you did know existed. It never hurts to consider the thoughts of others and to learn something new or different. Knowledge breaks barriers, tears down walls, and removes blinders. Reach for the unthinkable and dream big. Continue to search for knowledge within yourself, your family, your friends, your peers, your mentors, and complete strangers. Let it guide you to things that may seem unknown, scary, or unconventional; after all, you never know where it takes you in your journey throughout life. We hope you enjoy the 2012 edition of Hohonu.

Me ka ha'aha'a,

na'u nō Haley Ann Ku'uipo Bufil
Editor In Chief
bufil@hawaii.edu

[1] Puku'i, Mary Kawena. 'Ōlelo No'eau, Hawaiian Proverbs and Poetical Sayings. Honolulu, Hawai'i: Bishop Museum Press, 1983.

Celebrating 10 years of excellence in academic writing of UHH and HawCC students.
This is only the beginning of great things to come in the future. E ho'omau!

# About the Cover Artwork

Please take time to enjoy the cover of Hohonu as it is a special 10th Volume version which celebrates 10 years of high quality academic writing of UHH and HawCC students. Hohonu held a cover art contest open to current students at both campuses to find artwork depicting the cover's theme: "The History of Writing". Entitled "Kumumea," the Hohonu staff is pleased to present to you the cover artwork of Kapena Alapai from Kailua-Kona. He is a Hawaiian studies major, as well as an art minor.

Thoughts from the artist:

"I decided to use paint simply for the use of color. The world of writing can be a very dreary world of black and white, unless you share a connection to the author's words."

"I don't really feel this piece accurately depicts [the theme], to make a piece that grand might take a lifetime; but what's better to depict other than things found most difficult to describe. There are countless 'oli, mele, and mo'olelo for these [kinds of] elements, but your interpretation is how you connect to those elements, like your interpretation of a poem."

"When I thought of the word Hohonu, I thought about things that are deep and limitless, places that were hard to get to, reserved only for those who did the work. I chose wai firstly because of its direct relation to the kai hohonu. Those who set sail and voyaged successfully on the kai hohonu were very skilled. The lava, Pele, is put in to represent all the new generations of writers; this is connected to the lehua, which is one of the first plants to come up after Pele's kapa. The koa and hā'uke'uke are put in for the hard work that goes into harvesting them. The koa is put in because of its symbol for strength, and its life cycle. The koa is planted in one lifetime and it benefits generations to come, just as the literature is left behind for us. The hā'uke'uke is in there because of its difficulty to get. You must pay close attention to your surroundings, the ocean, when going to gather hā'uke'uke, but the meat is worth the work."

A picture is worth a thousand words; likewise interpretations vary from person to person. In many ways writing is an art: it allows the mind to wonder, expand, and investigate things that are not so black and white, but grey instead. Both writing and art are full of symbolism which helps us to better see, understand, accept or change, and interpret the world as we know it.

E ola koa. [1]
Ka ulu koa i kai o Oneawa. [1]

# Hohonu Mission Statement

Hohonu is a journal of academic writing published for and by the students of the University of Hawai'i at Hilo (UH Hilo) and Hawai'i Community College (HawCC). Hohonu strives for excellence in producing a product reflective of the student body, their talents, and interests. Hohonu encourages scholars to show pride in their work, providing them with the opportunity to have their work published and the opportunity to read the work of their peers. It is the aim of Hohonu to facilitate in sharing of quality academic writing and to exist as a reference for students looking to learn something about writing, a new subject, an attitude, or perhaps even themselves.

[1] Puku'i, Mary Kawena. 'Ōlelo No'eau, Hawaiian Proverbs and Poetical Sayings. Honolulu, Hawai'i: Bishop Museum Press, 1983.

# Me He Wa'a Kaulua Lā

*na Samantha Aolani Ka'ilihou, kailihou@hawaii.edu*
*Ha'awina Hawai'i 690, Hā'ulelau 2011, UHH*

Ma ka wā kahiko, ma ka 'āina 'o Nāpo'opo'o, ua noho kekahi keiki makua 'ole. Ua hala kona mau mākua 'elua i ke kaua 'o Puana, ke kipi ho'i o Nāmaka'eha ma Hilo[1] a kokoke nō 'o ia e pepehi pū 'ia. Ua ho'opakele 'ia nō na'e a ola ihola 'o ia a nui. Na kona 'Anakala i hānai iā ia. He kahuna pule kona 'anakala a ua hānai 'ia nō ke keiki i ka 'oihana kahuna pule o ia wā. Ua a'o 'ia nā pule lō'ihi a me nā hana like 'ole o ka heiau. Pēlā nō i kūkulu 'ia ai kona kahua i ka wā keiki[2]. 'O kēia wā, he wā ma hope o ka hiki 'ana mai o nā moku 'ē. He mau makahiki nō ho'i ma hope o ka make 'ana o Kāpena Kuke a he mea ma'amau ke kū 'ana o nā moku 'ē i Kealakekua. I ka 'ike 'ana i kēia mau moku e kū ana, ua komo ka 'i'ini i loko o ua keiki nei e 'ike maka i nā mea o waho o Hawai'i nei. 'A'ole nō 'o kēia 'i'ini he 'imi i ka mea e ola ai ka 'eha makua 'ole e like me ka 'ōlelo a kekahi. He mea Hawai'i ia 'i'ini, ka 'i'ini e 'au loa aku me he manu lā. He 'i'ini ho'okahi i hū iho nō i ka na'au o ka po'e hiki mua mai i kēia pae 'āina mai Kahiki mai. Ua 'e'e nō kēia keiki ma luna o ka moku 'o Triumph no Nuioka, ka moku nō ho'i o Kāpena Brintnall[3] a holo loa akula ia moku i ka 'āina 'ē. 'A'ohe ona hope e ho'i mai ai.

'O kēia keiki i holo loa ma luna o ia moku 'ē, ua 'ike maka nō 'o ia i ka 'āina Pākē 'o Kina, Nuioka, a hiki aku i Cornwall, Konekikuka, kahi i kanu 'ia ai kona mau iwi. 'A'ohe ona ho'i i Hawai'i nei, 'a'ole nō i 'ike hou 'ia ke one hānau. Eia hou na'e, ua kō kona 'i'ini i ka 'ike maka i nā mea ma waho o Hawai'i nei. Ua malu nō ka na'au. 'O 'Ōpūkaha'ia ia keiki 'imiloa. 'A'ole paha 'o ia i 'ike mua i ka hopena o kona holo loa i Konekikuka. Ua pae mai nā mikionali mua loa i Hawai'i nei i kona mo'olelo aku. I ka pae mai o kēia mau po'e Kalikiano, puka pū mai ka huliau e hala mau nei. Nona ho'okahi ia, nona ia ho'ohuli pākela a 'o ka nalu i lawe iā ia mai Hawai'i aku, aia nō ke po'i nei.

Ke kū kākou a nānā mai uka aku i kai, 'ike 'ia 'o Kahiki moe, kahi i puka aku ai ka wa'a. 'A'ole nō i ho'okahi Hawai'i e kū ana i kai a 'ike 'ole iā Kahiki moe. Me ia mana'o nō au e hāpai nei i ka waiwai nui o ko'u huaka'i i Tonga, kahi i kipa mua loa 'ia e ka po'e Lapita, ka 'āina momona i ka 'ai a mā'ona i ka lepo. Ma ia huaka'i nō au i 'ike maka ai ma waho aku o Kahiki moe.

Ma ka lā 'ehiku o Iune, ua ha'alele māua 'o Emalani iā Hawai'i no Pīkī, ma ia ala nō māua i hele aku ai i Tongatapu, ka mua o ka 'āina Tonga a māua i kipa mai ai. 'O ke kahua mokulele o Nandi kahi i ho'omaka ai māua 'o Emalani e lohe i ka 'ōlelo Tonga, ma waena o ka po'e e kali ana i ka mokulele. Ua 'ike koke 'ia ka ikaika o ka 'ōlelo Tonga ma waena o kona po'e a me ke 'ano o ia 'ōlelo ke lohe aku. Akā, he ho'omaka wale nō ia o ka huaka'i, he 'ehiku pūle ka lō'ihi, a he nui nō ka ha'awina i a'o 'ia mai.

'O ke aupuni o Tonga, he aupuni kū'oko'a ia. 'A'ole nō e ka'a nei ke aupuni Tonga ma lalo o kekahi aupuni 'ē. He kumukānāwai ko ke aupuni i haku mua 'ia ma 1875 a ho'āno hou 'ia ma 1970. I loko nō o ke kū'oko'a o ia aupuni, he lālā 'o Tonga o ka Commonwealth of Nations. He 'ahahui aupuni ia o nā aupuni kū'oko'a i ka'a mua ma lalo o ke aupuni Beretānia. Akā, ke kū'oko'a nei ia mau aupuni i kēia mau lā. 'O Tonga kekahi aupuni mai loko mai o nā aupuni kanahākūmāhā ma lalo o ia 'ahahui. 'O ka mō'ī o Tonga, 'o ia ho'i 'o Siaosi Tupou V. E noho mō'ī ana kona 'ohana 'o Tupou ho'i mai 1845 a hiki i kēia manawa.

He 'elima pū'ulu mokupuni o Tonga, 'O Tongatapu kekahi. 'O ia ho'i kahi o ke kapikala 'o Nuku'alofa. 'O 'Eua,'o Ha'apai, 'o Vava'u kekahi a 'o Niua ka 'elima. He ho'okahi haneli kanahikikūmākahi mokupuni o ka pae 'āina o Tonga. He po'e ko nā mokupuni kanahākūmāwalu mai loko mai o ia mau mokupuni ho'okahi haneli kanahikukūmākahi. 'O ka hapanui o ka po'e e noho nei ma Tonga, ma kahi o kanaiwakūmāwalu pākēneka o nā po'e a pau, he mau Tonga ia.

Ma ia wehewehe pōkole hiki nō ke 'ike 'ia ka ikaika o po'e Tonga i nā kumuloli like 'ole. He aupuni kū'oko'a, he mō'ī, he pae 'āina nona nā mokupuni he nui, he 'ōlelo Tonga ko ia lāhui. Aia nō ke ola ikaika nei ko Tonga ma ko lākou 'āina pono'ī. He mea i 'ike pinepine 'ole 'ia ma ka Pākīpika ho'i. 'O ka hapanui o ke aupuni 'ōiwi i ka Pākīpika, ke ka'a nei ma lalo o kekahi aupuni 'ē i ho'okolonaio i ke aupuni mua. 'O ko Tonga, he lāhui ho'ohālike ma ia 'ano no kākou a pau, ka po'e Polenekia ho'i.

I loko nō o ka ikaika o ko Tonga a me ke aupuni ma ke 'ano he Tonga, ua komo nō ka po'e Haole ma waena o ka po'e Tonga a ua pā nō nā honua Tonga like 'ole i nā mea hou, he uila, he ka'a, he kakalina, he kīwī, he pūnaewele, he kelepona pa'alima, he waiwai pa'a like 'ole ko ia 'āina ku'una. 'A'ole nō i 'oko'a loa ke kuko o ko Tonga no ia mau waiwai pa'a mai ka po'e Hawai'i. He like nō ia. Akā,'a'ole nō he po'e kenikeni ko Tonga a no ka pipi'i o kēlā me kēia mea, pa'akikī ka loa'a 'ana o ia mau mea waiwai pa'a. He kōkua ia pa'akikī i ke ola mau 'ana i ka 'ike ku'una ma waena o kona po'e, no ka mea noho 'ilihune ka po'e Tonga. 'O ia 'ilihune, he 'ilihune ma ka waiwai pa'a. 'A'ole loa he 'ilihune ma ka momona 'ana o ka 'āina. Mahi'ai 'ia ka 'āina me ka ikaika. Momona nō ka lepo a ulu nui nā 'ai like 'ole ma ia 'āina. Ke ola nei nō ka 'ike ku'una mahi'ai i ko lākou 'ilihune waiwai pa'a. Ola nā Tonga i ke kanu 'ia o kō lākou 'āina. 'O kekahi mea momona,'o ia ho'i kā lākou 'ōlelo makuahine. 'O ia nō ka 'ōlelo o lākou mai ka 'ohana a hiki i ke aupuni, mai ka hale kū'ai Pākē a ka pule 'ana. Ikaika loa ka 'ōlelo ma waena o kona po'e. I ko'u mana'o, pēlā e ola mau ai ko Tonga. Inā e ola mau ana ka 'ōlelo Tonga ma waena o ka po'e me ka ikaika e kū nei, e ola nō ko lākou 'ike ku'una a me ko lākou 'ano Tonga. E lilo ana nō kekahi mau mea Tonga i mea hou i ka hala 'ana o nā makahiki e hiki mai ana, akā 'a'ole nō he mea nui ia ke pa'a ka 'ōlelo. Eia nō ka'u i 'ike aku

ai i ko'u mākaʻikaʻi ʻana i ka ʻāina o Tonga. E ka mea heluhelu, ʻaʻohe oʻu poina i ka pōkole o koʻu noho ʻana ma Tonga a me ke ʻano o koʻu maka, he maka ʻē hoʻi koʻu. Pēia ke kālailai i ka maikaʻi nui i hiki iaʻu mai ke kahua i loaʻa mai iaʻu ma mua o koʻu hiki loa ʻana mai i laila. I loko nō o ka nele o kekahi mau ʻike, he lawa nō hoʻi koʻu i makepono nō ke kipa aku, i mahalo nui ʻia koʻu wā ma Tonga.

Ua hoʻokaʻawale ʻia kaʻu moʻolelo i nā honua like ʻole aʻu i komo aku ai ma Tonga. Ua koho ʻia ia ʻano kaʻawale, ka honua nō hoʻi, no ka mea pēlā e ola mau ai kekahi ʻōlelo, ke loaʻa nā honua like ʻole i kona hoʻohana ʻia. Ua aʻo mua ʻia ma kā Pila papa, i hoʻōla ʻia kekahi ʻōlelo, pono e loaʻa he ʻekolu honua a ʻoi i kēlā a me kēia kanaka ʻōlelo. Pēlā nō e hoʻōla ʻia ai ka ʻōlelo. No laila, eia nō nā honua like ʻole aʻu i komo ai ma Tonga a he wahi kālailai lā i pāku'i pū ʻia:

Ke Kahua Mokulele ʻO Fuaʻamotu

I ko māua hiki ʻana mai ma ke kahua mokulele ʻo Fuaʻamotu ma Tongatopu, ua ʻike wau he poʻe Tonga nā limahana i laila. He poʻe Tonga ke nānā aku, he poʻe Tonga nō hoʻi ke lohe aku. ʻO nā limahana hui mokulele he mau poʻe Tonga, a ʻo nā limahana hōʻoia palapala ʻae holo he mau poʻe Tonga. Ua piha ke kahua mokulele i nā limahana Tonga. ʻAʻole nō paha he mea nui i ka noʻonoʻo mua ʻana, akā ke hoʻohālikelike ʻia me nā limahana i ʻike mau ʻia ma ke kahua mokulele ʻo Honolulu International Airport, ʻokoʻa loa ia. I koʻu hiki mua mai i kēia kahua mokulele ma Tonga, ʻaʻole nō wau i noʻonoʻo nui e pili ana i kēia ʻokoʻa. Akā, ua aʻo nō wau ma hope o ka hala ʻana o kekahi mau pule ma Tonga, he hōʻailona nui ia o ka moʻolelo o Tonga a me ka ʻokoʻa o ia moʻolelo mai ko kākou. ʻO Tonga, ʻaʻole nō i nui nā poʻe komoneʻe. ʻAʻole nō i hoʻokumu ʻia ka ʻoihana mahikō ma Tonga, ʻaʻole nō i hoʻokumu ʻia kekahi ʻoihana nui i paipai ʻia ai ka poʻe ʻē e komoneʻe. Ma muli o kēia, ʻaʻole nō i ʻōʻā ʻia me ke koko ʻē. Ma Hawaiʻi nei, ua nui ʻino ke komoneʻe o ka poʻe ʻē a ua male nō kākou, nā Hawaiʻi, me kēia mau poʻe. ʻO ka hopena, hapa kākou, ʻōʻā ʻia me nā koko like ʻole. No laila, ke hiki mai kākou ma ke kahua mokulele ʻo Honolulu International Airport, ʻaʻole nō he mau Hawaiʻi piha i ʻike ʻia nō. He Hawaiʻi kekahi o nā limahana, akā ʻo ka hapanui he mau kūloko, he poʻe hoʻoilina o ia moʻolelo komoneʻe mahikō. Pēlā ka hapanui o ka poʻe e noho nei ma Hawaiʻi nei. Pēlā ka hopena o kākou.

ʻO ka ʻōlelo ma ke kahua mokulele, he ʻōlelo Tonga ia. He ʻōlelo Tonga ko nā hōʻailona ma nā paia, he ʻōlelo Tonga i lohe ʻia mai ʻō a ʻō o ke kahua mokulele. Iaʻu, me he Tonga lā koʻu nānā ʻana, no laila ʻōlelo Tonga mai nā limhana iaʻu. Akā, ke hōʻike ʻia koʻu hiki ʻole ke ʻōlelo Tonga, ua ʻōlelo Pelekānia mai nā limahana. He poeko nō ko nā limahana i ka ʻōlelo Pelekānia, he Beratānia ke ʻano, ʻaʻole nō he ʻano ʻōlelo Pelekānia ʻAmelika. Ma kēia hiki ʻana mai, ua manaʻo wau, paʻa ka ʻōlelo Pelekānia i ka limahana kahua mokulele no ke ʻano o ia wahi. He wahi nō hoʻi ia i loaʻa ai nā malihini he nui, pono e paʻa ka ʻōlelo ʻē i nā limahana.

Ka Hale Kūʻai Pākē

Ua kiʻi ʻia māua e kekahi mau hoaaloha o kekahi hoaaloha ʻo Colin lāua ʻo Hopo ko lāua inoa. Ua lohi loa ko māua mokulele a kuʻu maila ma ke ahiahi o ka Poʻaono. Ua manaʻo aʻoʻaʻo mai ia mau kāne ʻelua, e paʻa ana nā mea a pau ma ka lāpule, he sapati nō hoʻi ia. No laila, lawe ʻia māua i wahi hale kūʻai ma waena o nā hale o nā kamaʻāina. He lumi wale nō ke ʻano me nā pukaaniani ma ke alo a uhi ʻia ia mau pukaaniani i ka uea makika. Aia nā lako hale kūʻai ma nā hakakau ma ka paia hope. ʻO ka hana, e kuhikuhi wale nō i ka mea e makemake ʻia a na ka limahana e kiʻi nāu a ke uku ʻia, hāʻawi ʻia kāu mau mea iā ʻoe. ʻO ka pūʻiwa hoʻi, he mau Pākē nā limahana. He ʻelua limahana Pākē o ia hale kūʻai liʻiliʻi. Na Hopo i kamaʻilio me lāua ma ka ʻōlelo Tonga a maopopo akula iā lāua a pane ʻia mai ʻo ia ma ka ʻōlelo Tonga. Akā, i ko mākou kū ʻana i laila, ua kamaʻilio nō nā limahana Pākē i ka ʻōlelo Pākē kekahi me kekahi. Ua paʻa nō ka ʻōlelo Tonga iā lāua.

Ua pūʻiwa mua au i ka ʻike ʻana i nā Pākē ma Tonga. ʻAʻole nō i nui loa ka poʻe Pākē, akā ʻo ka hapanui o ia ʻano hale kūʻai, ʻona ʻia e ka poʻe Pākē. I ko māua mākaʻikaʻi ʻana i nā mokupuni like ʻole, ua ʻike ʻia. ʻO ka mea hoihoi naʻe, ʻōlelo lākou i ka ʻōlelo Pākē kekahi i kekahi a ʻōlelo Tonga lākou i ka poʻe Tonga, ʻo ia hoʻi ka mea kūʻai. Akā, ʻaʻole nō i ʻōlelo Pelekānia lākou. Ua komo nō au i kēia ʻano hale kūʻai i nā lā a pau ma laila, akā ʻaʻole nō au i lohe i hoʻokahi Pākē e ʻōlelo Pelekānia ana. ʻAʻohe o lākou pono e aʻo ai i ka ʻōlelo Pelekānia i lawelawe ʻoihana ma Tonga. He honua ʻōlelo Tonga nō ia. He honua i ʻona ʻia e ka poʻe ʻē hoʻi.

ʻO nā mākeke ʻē aʻe, he ʻano mākeke kaupokulani ke ʻano, he mau Tonga ka poʻe kālepa ma ia mau mākeke. He kālepa mahinaʻai ke ʻano, akā kūʻai aku i nā mea hana lima ma ia ʻano mākeke kekahi. Akā, he mau Tonga wale nō ka poʻe kālepa a he ʻōlelo Tonga kā lākou ʻōlelo. ʻAʻole nō i like ke ʻano o ka poʻe kālepa me nā limahana kahua mokulele. He mau mahinaʻai lākou. Akā, ma kēia ʻano mākeke ma Nukuʻalofa a me Vavaʻu, nui nā malihini i komo. No laila, he mea maikaʻi ka hiki ke ʻōlelo Pelekānia. Pēlā nō ka poʻe kālepa, hiki nō ke ʻōlelo Pelekānia, ma ka ʻaoʻao kālepa ʻai a me ka ʻaoʻao kālepa mea hana lima. Akā, ʻo ka ʻōlelo Tonga ka ʻōlelo ma waena o ka poʻe. Hoʻohana ʻia ka ʻōlelo Pelekānia i kōkua i ke kālepa i ka malihini. He honua ʻōlelo Tonga nō ia.

Ka Pule

Ua hele māua ʻo Emalani i ka pule i kēlā me kēia Lāpule ma Tonga. Ua hala ka Lāpule mua wale i ke kamaʻāina ʻole i wahi o ka halepule. ʻO ka pule ʻana, he mea nui loa i ka poʻe Tonga ia. ʻAʻohe wahi i wehe ʻia ma ia lā. He lā hele i ka pule a hoʻi mai i ka hale. ʻAʻohe mea ʻē aʻe e hana ai ma ka Lāpule. Ua noho māua ʻo Ema i kekahi hale hoʻokipa ma kahi o ke kūlanakauhale ʻo Nukuʻaloha. Ma Nukuʻalofa, ua nui nā hale hoʻokipa, nā hōkele hoʻi. I loko nō o nā malihini e hiki mau mai, ʻaʻohe ona wahi e wehe ʻia ai, paʻa nā hale like ʻole.

Ma hope o ko māua ha'alele 'ana iā Nuku'alofa no nā mokupuni 'ē a'e, ua 'ike 'ia ma waena o ka po'e ka hana ma'amau, ka loina ho'i o ka po'e Tonga ma ka Lāpule. Ma Vava'u, ua 'ike maoli 'ia. Ho'omaka ka hola pule ma ka hola 'umi o ke kakahiaka. 'A'ole nō i 'oko'a ka hola o ka pule ma waena o kēlā a me kēia halepule. 'O ka hola 'umi ka hola pule no nā hale pule a pau. Ala ka po'e ma ke kakahiaka a ho'omākaukau i ka imu, he umu ma ka 'ōlelo Tonga. He like ia mau mea 'elua. He lua i 'eli 'ia. 'A'ole nō he mea ma luna o ka honua e like me ka umu Kāmoa. He lua nō ia i 'eli 'ia a ho'okomo 'ia ka mea'ai i loko o ka lua a uhi 'ia. Eia na'e, ho'ā 'ia ka umu a ho'okomo 'ia ka mea'ai i loko o ka umu, uhi 'ia a waiho 'ia a pau ka pule. Hana 'ia kēia mau mea a pau ma mua o ka hele 'ana i ka pule. Ma ka 'oia'i'o, kuke nā po'e Tonga i ka umu i nā manawa like 'ole. 'A'ole nō ma ka Lāpule wale nō. Akā, mālama nā 'ohana a pau i ka umu ma nā Lāpule. Ke pau kēia hana, hele ka 'ohana i ka pule a ke ho'i mai, hu'e 'ia ka umu a 'ai ka 'ohana. He wā launa kēia, he wā 'ai pū kēia, he wā 'ohana nō kēia. Ke pau ka 'ai 'ana, hele ka po'e i ka hiamoe. He ho'omaha maoli nō kēia lā. I ka hele 'ana ma nā alanui, hiki ke 'ike 'ia ka po'e e nepe ana i ko lākou hale. 'A'ohe po'e e hana ana i waho o ka hale. 'A'ohe po'e e holoi lole. He ho'omaha maoli nō ka Lāpule. 'O ke kīwī, he mau polokalamu haipule wale nō i ho'olele 'ia ma ke kīwī ma ka Lāpule.

'O kekahi mea hoihoi pili i ka pule, 'o ia ho'i ka paipala. Ho'okahi wale nō paipala Tonga. No laila, ho'ohana 'ia kēia paipala ho'okahi ma nā hale pule like 'ole. Inā he Kakōlika, he Molemona, he Pentecostal, he Church of Tonga kekahi, 'o ia ka paipala e ho'ohana 'ia nei. I loko nō o ka loa'a 'ana o nā 'ano 'ekalasia like 'ole ma Tonga, ho'okahi wale nō paipala Tonga. He mea nui ka hiki ke heluhelu a maopopo i ka paipala Tonga. Hele nā po'e o nā hale pule like 'ole i ke kula sapati. Aia ka lā i mālama 'ia ai ka papa i ke 'ano o ka hale pule. Ua kama'ilio māua 'o Ema me kekahi kahuna pule Kakōlika ma ko māua kipa 'ana iā Niuatoputapu. 'O Father Mateo Kevalu kona inoa. He kahuna pule 'o ia ma Nūhōlani, he Tonga 'o ia. Aia 'o ia e kipa ana i kona 'ohana ma Niuatoputapu, no laila nō kona Māmā. Ua hō'ike nō 'o ia i ka loa'a 'ana o ho'okahi wale nō paipala Tonga. 'A'ole 'o ia i wehewehe i ke kumu, akā ua 'ōlelo 'o ia i ka 'ae 'ana mai o ka 'ekalesia Kakōlika i ka ho'ohana 'ana ma kahi o ka paipala Kakōlika ma'amau. He mana King James ia a ua unuhi 'ia e nā mikionele mua loa, no 'Enelani nō lākou. 'O ia ka mana e ho'ohana 'ia nei a hiki i kēia manawa. I ko'u mana'o wale nō, he mau kumu no ia loa'a 'ana:

1. 'A'ole nō i 'ae 'ia ka unuhi o ke kekahi mana o ka paipala e ke aupuni Tonga. He hale pule pono'ī ko ka mō'ī, e noho mō'ī ana kona 'ohana mai 1845. 'O ia ka paipala o kona aupuni. He lōkahi nō ho'i i loko nō o ka 'oko'a.
2. No ka nui o ka hele pule 'ana, laha kēia mana paipala i ka po'e Tonga. E heluhelu 'ia ana ia mana mai ko lākou wā 'u'uku. 'O ia ka mea kama'āina iā lākou a kūkulu 'ia ka ha'awina o nā hale pule like 'ole ma luna o ia paipala. No laila, 'a'ole pono e ho'ololi 'ia. Ua hana 'ē ka hana nui i kū ka ha'awina o nā hale pule nona ka mana paipala 'oko'a.
3. Hele ka po'e Tonga i ka hale pule i ho'ohana 'ia ai ka paipala kama'āina. He mea nui loa ka heluhelu paipala 'ana. He hō'ailona o kou akamai ka heluhelu paipala. No laila, 'a'ole paha i hoihoi ko Tonga e heluhelu i kekahi mana paipala ma kahi o ka mea i pa'a mua. He 'ano ho'okūkū ia ma waena o ka po'e, ke akamai ma ka paipala. 'O ka paipala like kai ho'opili i nā 'ao'ao 'oia'i'o a pau i hiki ke ho'okūkū.

'O kekahi kumu 'ano nui, 'o ia ho'i ka lilo. Emi nō ka paipala Tonga. Ke komo 'oe i kekahi hale kū'ai puke ma Tonga, 'o ka puke nona ke emi loa, 'o ia ho'i ka paipala Tonga. He hō'ailona ia o ke 'ano o ka po'e a me ka makakoho o ka po'e. Pipi'i loa nā puke 'ē a'e. 'O ka puke keiki, 'o $30 pa'anga a oi ka lilo. 'O ka paipala Tonga, ma kahi o $14 ka lilo. Ke ho'ohālikelike 'ia kēia me ka paipala Hawai'i. 'A'ole nō i like iki. Pipi'i loa ka paipala Hawai'i. 'O $80 kālā a 'oi ke kumukū'ai. 'A'ole i nui ka makemake 'ia o ia puke Hawai'i, no ka nele o kākou i ka po'e 'ōlelo Hawai'i 'ole a me ka hele 'ole i ka pule. He hō'ailona nui ia o ka 'oko'a ma waena o kākou a me kēia po'e Kalikiano ikaika o ka Pākīpika.

Ka Po'e 'Oihana

Ma Vava'u, kahi a māua 'o Emalani i noho lō'ihi ai, he wahi kipa nui 'ia e ka malihini. Kaulana 'o Vava'u i ka holo 'ana o nā koholā. Hiki ka po'e ke 'au pū me nā koholā a he awa kaulana loa ma waena o nā po'e moku pe'a, nā "yachties" nō ho'i. Ma muli o kēia, he mau hale 'āina, he mau hale inu, he mau hale kū'ai lole nō ho'i ko kēia wahi. 'O nā 'ona, he mau po'e Haole, no waho loa lākou pākahi. 'A'ole nō wau i 'ike i ho'okahi pā 'oihana nona kekahi Tonga, koe na'e ka hale ho'okipa a māua 'o Emalani e noho ana. I ke kama'ilio 'ana me Toutai a me kona makuahine 'o Louisa, na lāua ia hale ho'okipa, ua wehewehe mai lāua i ka pa'akikī o ka 'āpono 'ana i pā 'oihana Tonga ma Vava'u. No ka mea, 'o ke kōmike nona ke 'āpono, piha i nā po'e pā 'oihana Haole. Na lākou nō ka 'ae a me ka 'ole. Wahi a Toutai, i kēlā makahiki aku nei, ua noi kekahi kāne Tonga e ho'okumu i kekahi 'oihana māka'ika'i kai, he ocean, boating tours ke 'ano o ka pā 'oihana. Ua hō'ole 'ia. I kēia hō'ole 'ia, ua pi'i ka wela o ka po'e kupa o Vava'u a pi'i pū ka makakau o ka po'e Tonga i kēia hana 'āpiki o ka po'e 'ē. Ma muli o kēia, wahi a Toutai, ke 'ano loli nei me ka mālie nui nō na'e.

'O kekahi mea hoihoi a'u i 'ike ai. He mea nui ka hiki ke 'ōlelo Pelekānia me ka poeko nui. 'O ka mea mua, 'a'ole nō au i launa me ho'okahi kanaka hiki 'ole ke 'ōlelo Pelekānia. 'A'ole nō i pa'a nō ka 'ōlelo Pelekānia i nā po'e a pau. Akā, lawa nō no ke kama'ilio

'ana. Maopopo nō na'e ka 'ōlelo. Mai ka 'elemakule ma Niuatoputapu, ma kahi o kanawalu ona makahiki, a hiki i kekahi keiki, he 'ekolu wale nō ona makahiki, pa'a ka 'ōlelo iā lākou. 'A'ole nō i pilikia māua 'o Ema i ka 'ōlelo Pelekānia 'ole. Ma ka pā 'oihana no ka malihini, 'oi loa aku ka mākaukau o ka 'ōlelo Pelekānia ma waena o ka limahana. He ahuwale ia, pono ka 'ōlelo Pelekānia no nā malihini. Hai 'ia ka po'e Tonga nona ka mākaukau nui. I ke kama'ilio 'ana me kēia mau limahana, 'o ka hapanui, ua hele i ke kulanui ma Aotearoa, Nūhoulani, a i 'ole 'Amelika. Ua nui nō ka po'e Molemona e hana ana ma kēia mau pā 'oihana. No ka mea, ua huaka'i mikiona lākou a ho'ohana nui 'ia ka 'ōlelo Pelekānia a mākaukau lākou. Pēlā i loa'a ai kekahi hana i nā po'e, i ka mākaukau o ka 'ōlelo.

Ka Ho'ona'auao

Ua komo nō māua 'o Emalani i nā kula o Tonga. Ma Niuatoputapu, ua noho pū a launa ma ke kula kamali'i 'o GPS Falehao a me ke kula ki'eki'e 'o Niuatoputapu High School. Ma Vava'u, ua komo māua 'o Emalani i ke kula ki'eki'e 'o Vava'u High School a me ke kula ki'eki'e 'o Sainehā High School. 'O nā kula mua 'ekolu, he mau kula aupuni ia. 'O ka 'ehā he kula kū'oko'a, he kula Molemona ke 'ano. 'O ka mea hoihoi, a'o 'ia nā haumāna ma ka 'ōlelo Pelekānia. Ho'omaka e a'o i ka 'ōlelo Pelekānia i ka papa mālaa'o. I loko nō o ka maopopo 'ole o ia 'ōlelo i nā keiki, a'o 'ia ka papa ma ka 'ōlelo Pelekānia. Ma ka hale, 'ōlelo Tonga wale nō ka 'ohana. Ma ke kula, 'ōlelo Pelekānia wale nō. Pēlā e a'o 'ia ai ka 'ōlelo Pelekānia i ka po'e Tonga a pau, ma ke kula ho'i.

Ma kahi o 'elua makahiki aku nei, ua ho'okohu 'ia kekahi Minister of Education hou. He wahine ia a he kālai'ōlelo 'o ia. Nāna nō kēia mau mea hou. Ma kahi o ka 'ōlelo Pelekānia wale nō mai ka papa mālaa'o a'e, pēia ka hana i kēia lā:

| Papa | % a ʻ o ma ka ʻ ōlelo Tonga ma mua ka mea hou | | % a ʻ o ma ka ʻ ōlelo Pelekānia ma mua ka mea hou | |
|---|---|---|---|---|
| Malaa ʻ o | 0 | 100 | 100 | 0 |
| 1 | 0 | 80 | 100 | 20 |
| 2 | 0 | 70 | 100 | 30 |
| 3 | 0 | 60 | 100 | 40 |
| 4 | 0 | 50 | 100 | 50 |
| 5 | 0 | 50 | 100 | 50 |
| 6 | 0 | 50 | 100 | 50 |
| 7 | 0 | 0 | 100 | 100 |

Hiki nō ke 'ike 'ia ka 'oko'a o kēia 'ano ki'ina a'o mai ka mea ma mua. Wahi a nā kumu, ua nānā 'ia ka nāwaliwali o ka 'ōlelo Tonga ma waena o nā po'e Tonga a ho'oholo ihola ke kōmike ho'ona'auao e kāko'o i ka pa'a mua 'ana o ka 'ōlelo Tonga ma ke 'ano he 'ōlelo o ke kula ma mua o ke koi 'ana i nā haumāna e a'o piha 'ia i ka 'ōlelo Pelekānia. 'A'ole maopopo le'a ia'u ke ana 'ana i kēia mau pākēneka, akā ua 'ike maka wau i ka heluhelu 'ana i nā puke 'ōlelo Tonga ma ka papa mālaa'o a me ka papa 'ekahi ma ka lumi papa. 'O ke kumu, 'o Losli kona inoa, ua wehewehe 'o ia i ka maha o kona na'au i ka 'ae 'ana mai o ke kōmike ho'ona'auao i ka ho'ohana nui 'ana i ka 'ōlelo Tonga. Ua wehewehe pū 'o ia, ma ka 'oia'i'o, ma muli o ka maopopo 'ole o ka 'ōlelo Pelekānia i nā haumāna, 'ōlelo Tonga nā kumu iā lākou. He mea ho'oluhi nui ka pono e 'ōlelo Pelekānia wale nō i nā haumāna ma ka papa mālaa'o a me ka papa 'ekahi. 'A'ole nō i ma'a ke keiki i ke kula a koi 'ia e a'o i ka 'ōlelo 'ē. I ke kama'ilio 'ana me nā kumu a pau ma nā pae like 'ole e pili ana i kēia mo'oki'ina hou, ua kāko'o piha 'ia. Aia nō na'e ke ho'okolohua nei ma kēia. 'A'ole nō i lilo kēia hana he lula i kēia manawa, akā pēlā i ka wā e hiki mai ana i ka mana'o o nā kumu.

I ko'u noho 'ana i nā papa ki'eki'e ma nā kula a pau, ua 'ike maka wau i ka 'ōlelo 'ana o nā kumu i nā 'ōlelo 'elua. A'o 'ia ka hapanui o ka ha'awina i ka 'ōlelo Pelekānia a ke wehewehe 'ia nā lāli'i, nā 'ōkuhi, ho'i ke kumu i ka 'ōlelo Tonga. 'O nā kumu, wehewehe lākou i ka pono o kēia i maopopo nā haumāna i ka ha'awina. Akā, e like me kākou, pono nā haumāna e puka ma nā hō'ike pae mākaukau ma ka 'ōlelo Pelekānia na'e. No laila, pono nā kumu e ho'omākaukau i nā haumāna 'ōlelo Tonga e puka ma ka hō'ike 'ōlelo Pelekānia. He pa'akikī loa kēia, he ho'oluhi nui loa kēia. I ko'u mana'o, e like me ka 'ōlelo Lākina i ka wā i hala, 'o ka 'ōlelo Pelekānia ka 'ōlelo ho'ona'auao ma Tonga. Pēlā ke kuana'ike o ka po'e Tonga. Ma muli paha o keia 'ano hō'ike pae mākaukau. Inā hiki ke heluhelu, kākau, a kama'ilio i ka 'ōlelo Pelekānia, he akamai nō ia. A kū'ai 'ia ia mau hō'ike mai ke aupuni Nūhōlani lāua 'o Aotearoa. No laila, pilikia pū nā kumu a me nā haumāna i ka mā'i'o a me ke kuana'ike 'ē ma kēia mau hō'ike pae mākaukau. 'A'ole nō i 'oko'a kēia ke ho'ohālikelike 'ia me nā nīnūnē o nā kula 'ōlelo Hawai'i.

'O kekahi mea nui, 'a'ohe kulanui ma Tonga. 'O ka University of the South Pacific wale nō ke kulanui ma Tonga a he lālā ia o ke kahua kulanui o Suva. No laila, pono ka po'e Tonga e hele i Aotearoa, Nūhōlani, a i 'ole 'Amelika no ke kulanui. Pono e pa'a ka 'ōlelo Pelekānia ke makemake e ho'omau ma hope o ke kula ki'eki'e. 'A'ole na'e i nui loa ka po'e i ho'omau i ke kulanui no ka loa'a 'ole o ke kālā kāko'o i nā haumāna. 'O ka hapanui, ho'i i ka hale a 'imi hana ma laila. 'A'ole nō i lawa iki ke kālā kāko'o. Ma ke Kulanui O Hawai'i Ma Hilo nei, 'elua wale nō haumāna Tonga, no Tonga nō me kēia kula. 'O lāua nā mua loa i hele mai i kēia kulanui. No Vava'u nō lāua a he mau haumāna ma lalo o East West Center. No laila, he kālā kāko'o 'Amelika ko lāua. 'O ke aupuni mō'ī o Tonga, 'a'ohe ona kāko'o. He li'ili'i 'ino nā kālā kāko'o i hiki ke noi a loa'a.

'O ke kula ikaika ma ka 'ōlelo Pelekānia, 'o ia ho'i 'o Sainehā, ke kula Molemona. 'O ke kahua o kēia kula mai ka 'ekalasia Molemona mai. No ia kahua ho'okahi nā pahuhopu, ke ki'ina a'o, ka mo'oki'ina o ka papa a pēlā wale aku. A kau 'ia ma nā paia like 'ole nā hō'ailona "English Only Please". Aia ia mau hō'ailona a puni ke kahua kula. 'O kekahi mea, 'o Sainehā ke kula i loa'a ai nā hale hou, nā ka'awane he nui, ma'ema'e ke kula a hiki nō ke 'ike 'ia ka nui o ke kālā i loa'a i ke kula mai

ka hale pule. Akā, i loko nō o ke kū'oko'a a me ka nani o kēia kula, 'o ia ke emi loa ma ke kāki kula. Kāki 'ia nā haumāna a pau i ka "school fees" ma kēlā me kēia kula, ma ke kula aupuni a me ke kula kū'oko'a. 'O Sainehā ke emi loa no ke kōkua nui o ka 'ekalesia Molemona.

Ma muli o ke 'ano o kēia kula, nā hale hou, ka ma'ema'e, ke kenikeni nō ho'i, nui ka po'e Tonga e 'ōlelo, "Rich that school. The Mormons get plenty money." Kohu mea lā, nui loa ke kāko'o o ka 'ekalesia Molemona i ke kaiāulu Molemona. Ha'aheo ka po'e Tonga Molemona i kēia. Kaena lākou i ka nui o ke kāko'o a me ka ho'olako o ka hale pule i ke kaiāulu Molemona. No laila, 'a'ole nō he mea pū'iwa ka nui o nā po'e Tonga i ho'ohuli 'ia a papekiko 'ia he Molemona. Palapala ka 'ekalesia Molemona, papekiko 'ia 45% o nā heluna kānaka o Tonga[4].

Ua loa'a nō kekahi 'ano kula 'ē a'e, ua kapa 'ia he "side" school. He kula aupuni i ikaika loa ma ka 'ōlelo Pelekānia. He 'ano "immersion" ia ma ka 'ōlelo Pelekānia no ka po'e 'ōlelo Tonga ma ka hale. He 'ano kula ho'okolohua ia. 'Elua wale nō o ia 'ano ma Tonga. Ho'okahi ma Tongatapu a ho'okahi ma Vava'u. I ka'u i lohe ai, 'o ia ho'i ka maika'i 'ole o kēia 'ano kula. No ka mea, komo nā keiki a pau a ka 'ohana ho'okahi i kēia 'ano kula, me ka mana'o 'oi loa aku ka mākaukau o nā keiki i ka 'ōlelo Pelekānia ke hiki mai ka wā kula ki'eki'e a puka me ka ma'alahi ma nā hō'ike a loa'a nō kekehi kālā kāko'o. Akā, ke komo nā keiki a pau a kekahi 'ohana, kama'ilio nā keiki i ka 'ōlelo Pelekānia ma ke kula a ho'i i ka hale a ho'omau kekahi i kekahi a lilo ka 'ōlelo o ka hale i ka 'ōlelo Pelekānia. No ka makemake nui 'ia o kēia e nā mākua, kāko'o 'ia a lilo ka 'ohana he 'ohana 'ōlelo Pelekānia. Ke 'ike 'ia nei kēia 'ano 'ohana i kēia manawa. Wehewehe 'ia kēia e kekahi kumu kula kamali'i, 'o Lose Foliaki kona inoa. He kumu a he kahuna pule kāna kāne. Wahi āna, 'ike 'ia kēia 'ano 'ohana ma ka hale pule. 'A'ole hiki i nā keiki ke heluhelu paipala 'ōlelo Tonga. Pilikia lākou i kā lākou 'ōlelo makuahine. I kona mana'o, he minamina nui kēia a pono e ho'opau 'ia kēia 'ano kula, 'a'ole nō he kōkua i ke keiki kēia 'ano kula. Hiki nō ke 'ike 'ia ka pilikia me kēia 'ano kula. Ma ka ho'omaka 'ana, 'a'ole nō i maopopo ka 'oko'a o ia 'ano kula mai ke kula aupuni ma'amau. Akā, i ko'u kipa 'ana i ke kula aupuni ma'amau, ua 'ike maka wau i ka nui o ka 'ōlelo Tonga i ho'ohana 'ia ma ke kahua kula. Kama'ilio nā haumāna a me nā kumu i ka 'ōlelo Tonga i ka hapanui o ka manawa, i ka lumi papa a i waho o ka lumi papa. Akā, ke a'o ke kumu, a'o ke kumu i ka 'ōlelo Pelekānia a lele ma waena o nā 'ōlelo 'elua ke pono. 'O ka "side" school, 'a'ohe 'ōlelo Tonga ma ke kahua kula. He 'ōlelo Pelekānia wale nō. Pēlā e pi'i ai ka mākaukau o ka 'ōlelo Pelekānia o nā haumāna. I ka ho'ohālikelike 'ana i kēia me ko kākou mau kula 'ōlelo Hawai'i, 'ike 'ia ke kumu no ka 'o'ole'a o nā kumu. E like me ka "side" school, pēlā e pi'i ai ka mākaukau o ka haumāna. Inā, 'ae mau 'ia ka 'ōlelo 'ana i ka 'ōlelo laha, 'a'ole nō e pa'a ana ka 'ōlelo hou i nā haumāna.

'O ka ho'ona'auao 'ōlelo Tonga, a'o 'ia ka papa 'o Tongan Studies a hiki i ka papa 9 ma ke kula ki'eki'e. 'O kēia papa, a'o 'ia ka pilina 'ōlelo Tonga a pēlā nō nā 'ānu'unu'u like 'ole o ka 'ōlelo Tonga. Pono nā haumāna e puka ma ka heluhelu 'ana, ka maopopo, a me ke kākau 'ana ma ka 'ōlelo Tonga. Akā, mai loko mai o nā māhele like 'ole, he ho'okahi wale nō māhele ma ka 'ōlelo Tonga. 'O ke koena, ma ka 'ōlelo Pelekānia ia. Ua kama'ilio wau a noho ma ka papa Ha'awina Tonga ma Sainehā a me ke kula ki'eki'e 'o Vava'u High School. I ke kama'ilio 'ana me nā kumu, hō'ike koke lāua i ka pa'akikī o ke a'o 'ana i kēia papa. 'A'ohe hoihoi o nā haumāna ma ka 'ōlelo Tonga. Hoihoi wale nō i ka 'ōlelo 'ē a me ka ha'awina pili i nā mea i waho o Tonga. No laila, ma hope o ka papa 9, 'a'ole i koi 'ia nā haumāna i kāinoa no ia papa, akā hiki nō ke koho. 'O ka hapanui, 'a'ole nō i koho 'ia ia papa. Li'ili'i wale nā papa ha'awina Tonga no ia kumu. A hāpai pū nā kumu ha'awina Tonga i ka minamina i ka maopopo 'ole o nā 'ānu'unu'u like 'ole o ka 'ōlelo Tonga i nā haumāna a me ke emi 'ana i ka 'ike ku'una Tonga no ka makemake 'ole o nā haumāna a me ko lākou mau 'ohana. I ke kipa 'ana i ka 'ohana o kekehi kumu kula 'o Taukolo Mahe a me kāna wahine 'o Hine, ua nīnau wau iā ia, iā Taukolo, inā i kona mana'o, e pilikia ana ka po'e Tonga i ka nui o ka 'ōlelo Pelekānia i a'o 'ia ma ke kula a pēia kāna pane, "Change will happen because of outside factors, such as tourism, economy, or business. This kind of change will not happen from the inside of a classroom." I ko'u mana'o, no Tonga, pēlā nō. Kāko'o. No Hawai'i, 'oko'a. 'O ka lumi papa, ke ho'iho'i i ka po'e Hawai'i i ke kahua o ko lākou mauli.

I ka ha'alele 'ana o 'Ōpūkahai'a iā Nāpo'opo'o, i ke kau 'ana o ka pe'a o ka moku 'ē a pā mai ka makani nui mai uka aku i pae ka moku ma ka nalu i kahi o Kahiki moe me he wa'a kaulua lā, 'a'ole nō i maopopo 'o 'Ōpūkahai'a i ka hua e loa'a mai ana i kāna huaka'i. Akā, he hua nō, he hua e mōhala mau ana.

**Notes**

[1]'Ī'ī, Ioane Papa. *Nā Hunahuna O Ka Mo'olelo Hawai'i.* (Honolulu: ka Hale Hō'ike'ike 'O Bīhopa) 139.

[2]Dwight, Edwin W. *Memoirs of Henry Obookiah*. (Honolulu: Woman's Board of Missions for the Pacific Islands, 1990), 2.

[3]Dwight, Edwin W., *Memoirs of Henry Obookiah,* 6.

[4]Church News, The Church of Jesus Christ of Latter-Day Saints. Published: Monday, Feb 1, 2010, http://www.ldschurchnews.com/articles/58667/Country-information-Tonga.html.

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# "Ghost in the Shell: S.A.C." Portrays Our Future

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*Question (1): Discuss which future-oriented movie, television show, or online/interactive game you think most accurately anticipates our future – and why.*

"Ghost in the Shell: Stand Alone Complex" is a Japanese anime, or animated program, produced in 2003, based on Masamune Shirow's manga - graphic novel - Ghost in the Shell. Set in a future Japan in the year 2030, technology and politics have progressed, becoming interwoven, and increasingly complex. Advancements have created opportunities, connections, and accessibility, but have also created complicated social and security issues. Although advancements in technology have rapidly changed the landscape of human interaction, notions found today of nation-states, free markets, and illegal gains have remained intact. Theft has evolved through hacking of secure information systems, giving criminals access to deeper levels of sensitive information and virtual goods. Political corruption and corporate greed continue unchanged from today, save for the nature of the secrets kept to keep careers alive and businesspeople in good favor with the public. On the one hand, the world appears on the surface to be drastically different from the world today. Underneath the surface however, lies the same world of today, only "enhanced" and given more complexity. There are many works of speculative fiction in the world, and many come close to seeming likely, but Shirow's anime series "Ghost in the Shell: SAC," for the reasons stated above, most accurately portrays our future.

The main themes of "Ghost in the Shell: SAC" include bio-technological enhancement of human beings in automation and cyberinteraction, and technological advances in warfare and weaponry, and the impact that these advancements make on human consciousness, already burdened with the "enhanced" connections resulting from globalization and imperialism. Some of the characters of "Ghost in the Shell" have undergone a med-technological process called "cyberization." Cyberization enables citizens to access wireless communication, internet access, and research from their minds. The cyberization process replaces parts of the brain – minimally or majorly depending on the individual's wishes to be "more or less artificial" – with nanotechnological robots, robots of an incredibly miniscule scale. This process, and its role in disturbing our concept of what it means to be human, or to be artificial, or its role in making us all truly connected to each other at all times, at will, figures in the stories of the program. The main, so-called "Complex" storyline, features the issue of a talented and socially discontent hacker gaining access through intrusion into "cyberized" brains– brains surgically altered to include electronic and remote internet access components – in order to take over the senses, the bodily functions, or to access information in the mind ("In the Forest"). The cyberization process also figures in this main storyline as the revelation of a disease resulting from the surgical cyberization alterations is made known. This revelation ultimately serves to compromise the origin corporation, as they put profits over people in trying to keep this information secret from the world ("Equinox").

A second feature of "Ghost in the Shell" involves further technological advancements in voluntary and therapeutic prosthesis. These advancements range from altering parts of the body (apart from the brain), such as the eyes and limbs, to function better, see farther, or exert greater force, to so-called "full-body prosthesis." In full-body prosthesis, the entire body is replaced with a mechanical, technological version, including a cyberized, mechanical brain. The "ghost" – the "soul" - of the human, or in other words, the human consciousness - transferred from the former biological self to the new artificial self, is the key that differentiates a human in full body prosthesis from a robot with advanced artificial intelligence. Even these lines become blurred - robots programmed to respond to situations with advanced artificial intelligence surprise all involved when they appear to use their own free will – something deemed an impossibility in a being without human consciousness - to act on their "wishes" ("Barrage"). Such robots, in "Ghost in the Shell," are used in all functions of society from basic automated tasks to advanced international warfare.

These advancements, while still (mostly) fictional, have been anticipated by social theorists with good track records for being right about the futures of the societies we live in. Influential theorist Marshall McLuhan "predicted … the … emerging electronic network," long before the emergence of the internet. He "originated the idea that human beings can extend their nervous system via a global neural net through the use of electronic media and devices" ("Marshall McLuhan"). McLuhan forecast our advancements in technology becoming coincidental with an innate human desire to be closely connected. In his view, we feel the need for constant interaction. It seems natural that his prediction, if accurate, should extend to the farthest reaches of human development as possible. As he foretold, we have discovered our need to be intimately and constantly in touch with each other, following the development of the World Wide Web, GPS, and mobile technology. For the first time we have the ability to actually be connected and aware of all other people at all times. It can be said that this increased connectivity to each other has created a "global neural net" Along which ideas spread and come to fruition at rates previously unmatched in history. If human beings, looking to implement connectivity to the furthest reaches of technological development that they can, continue to make advances in interpersonal technology, we will see

more and more personal enhancements – e.g. implants and bodily modifications to these ends – as predicted in "Ghost in the Shell: S.A.C."

As it happens, developing technology for such enhancements/modifications is currently in development in advanced laboratories. In the video-recorded talk, "Implant technology to enhance human abilities," speaker Kevin Warwick comments on recent innovations, growing neural tissue and linking it to robots. In other words, the technology to take artificial information and stream it over organic matter is in existence. So, he says, "we now have robots that don't have computers for brains, they have biological brains" ("Implant technology"). With huge difference in capabilities to process information between organic matter and artificial matter, such technology may lead to rapidly advancing AI, and, perhaps, to a level where the difference between human consciousness and artificial intelligence is blurred. Furthermore, the ability to "grow our parts" infers that we are indeed moving towards a future where humans will be offered options to "enhance" their bodies through high-functioning prostheses.

The robots with high levels of artificial intelligence, which later "evolve" to develop free will in the show are spider-like drones/one-person tanks called "Tachikoma(s)." Tachikomas are used to aid the military operations of the main characters. They are outfitted with machine guns, have surveillance equipment, and are capable of using cloaking technology and advanced evasive actions. Their artificial intelligence gives them the autonomy to "assist" their human soldiers by being able to respond to human questions – say about surveillance or threats – with the depth and perception that human beings use. As these creations become self-aware, they begin to ask questions among themselves on the nature of life and consciousness, like newly born humans.

Similarly to the concept of implanting access to wireless connection directly into people, the technology for developing weapons that can "think" is also already underway in regards to the airborne remote-controlled "drones" that have become a fixture of modern warfare:

> Ronald Arkin of the Georgia Institute of Technology's School of Interactive Computing … proposes involving the drone itself—or, rather, the software that is used to operate it—in the decision to attack. In effect, he plans to give the machine a conscience. The software conscience that Dr. Arkin and his colleagues have developed is called the Ethical Architecture. Its judgment may be better than a human's because it operates so fast and knows so much. And—like a human but unlike most machines—it can learn ("Droning On").

In creating consciousness for the weapon itself, there is a potential for increased reliability and accuracy in implemented war strategies. However, while the potential for developing A.I. to create more efficient war machinery is astronomical, such a consciousness could, presumably, lead to debate on intrinsic value and independence of both humans and artificial creations if they were to appear to advance to "self-awareness." "Ghost in the Shell" touches on these potentials in its comparisons of cyberized humans and Tachikomas, and in its debate of what constitutes, or does not constitute, the "soul."

Socially, politically, and economically, "Ghost in the Shell" predicts a likely future as the world it shows changes little about the dynamics and framework of how society currently operates. In the year 2030, governments in industrialized nations are democratically voted into power. Nations vie for other nations' state secrets, in addition to power and control over those nations through information, diplomacy, and military actions (the United States of America has, by this time, become the "American Empire"). Activist and terrorist groups are prominent players in the sometimes-just protest of corrupt state and corporate actions, through peaceful protest or through violent action. A gap between very rich and very poor still exists in most industrial nations.

This sort of future scenario is most likely because people, themselves, have not changed much over the eras. It is sometimes suggested that the onset of technological advancement will – at some point in our future – have an extraordinary effect on people and the ways that we conduct our lives. For instance, the 1970 book Future Shock by Alvin Toffler predicted a world in which information overload would become prevalent and "drive us insane" ("A Futurist 40 Years Later"). In a quote from the movie of the same name based off of Future Shock, writer and filmmaker Orson Welles provides narration: "This machine makes our lives move faster. Computers combine facts to make new knowledge at such high-speed that we cannot absorb it..." ("A Futurist 40 Years Later"). The fear and prediction expressed here is that machines and technological advance will impede and overcome our "normal, human" lives, eventually making us slaves to our own development. There is, in fact, no substantial reason to fear a technological "takeover" of this magnitude. As much as technology progresses and even merges with human biology and social life, it is, in the end, just developments that depend on human demand, as all other advancements do.

This concept is supported in "The Socialization of Markets." Neil Fligstein and Luke Dauter reflect on the nature of the global market to shift and change based on social, political, or self-oppositional values. In other words, demand or lack of demand for technologies and standards of living depend on these economic factors. For example, in writing of theory on how markets grow, change or shift, they comment:

While population ecology viewed the environment of the firm as "hard," and thus the main mechanism of selection was the availability of the scarcest resource, institutional theory posited that the environment was at least partially a social construction. Scott &

Meyer (1982) called such environments "sectors" and described the socially constructed environment of firms as a function of all the other organizations that might impinge on a particular organization. They included governments, suppliers, workers, and customers as part of such a social construction. We note that sectors that join all interested parties look quite similar to the set of actors that political economy focuses on, i.e., firms, governments, and workers. DiMaggio & Powell (1983) extended these arguments and called such environments "organizational fields" … The field metaphor implies that firms watch one another, engage in strategic behavior vis-`a-vis one another, and look to one another for clues as to what constitutes successful behavior (Dauter and Fligstein 111).

As markets shift based on economic and social factors, world affairs tend to progress predictably, as a consistent shift of power between nations. Olive Schreiner, an early 20th century feminist writer, is analyzed by Liz Stanley, Helen Dampier, and Andrea Salter. They note that her comments and predictions on early 20th century globalization, as seen from the changing social and political climate of Johannesburg, South Africa, consistently match with 21st century globalization theory. Schreiner's predictions on "changing & scalar territorial space; a changed time/distance relation through the material, then the virtual – steam, cable, post, telegram, telephone; change as the social fabric; [and] social movements & networks resisting from below" in regard to – as they say – the ontology of globalization research, follow with modern globalization theory on "post-territorial space; a changed time/distance relation through the virtual; [and] change as the social fabric." Her predictions on "pre/multi-disciplinarity; [and] mobilities … flows & especially of finance capital & global imperial expansionism" in regard to the "methodology" of globalization correspond with modern concepts of "post/multi-disciplinarity; [and] mobilities & flows" (Dampier, Salter and Stanley 673). In other words, as much that has changed, certain factors that determine the direction of human progress stay the same, and are more or less predictable over a long range of time.

In his "Wall Street Journal" review of Robert Friedel's A Culture of Improvement, columnist Adam Keiper reflects on what he perceives as Friedel's insinuation that technology is shaped by us, not vice versa: "Technology is not, he seems to say, the inevitable expression of advancing human reason or a great, impersonal force directing the course of history. Rather, it proceeds by fits and starts -- held back, pushed forward or diverted by social and biographical contingencies" (Keiper). Technology is a tool. It is not a being unto itself that will grow wildly out of balance if unchecked. "Ghost in the Shell: S.A.C." reflects this very notion. Humans live everyday with the average problems and afflictions we have now, if some of the names for them have changed, and are balanced in life, relationships, economics, and the technological progress of their societies.

The creator of the "Ghost in the Shell" franchise, Masamune Shirow, went to pains to create a fictional world and social environment in which humans and technology interact realistically. He did not think that humans would completely destroy the blueprint of society to start from scratch, and to create radical new societal structures, as is seen in some futuristic fiction, nor did he anticipate a great cataclysm reducing human society to its basest state against its will, creating a "post-apocalyptic" world in which people must struggle to survive and fight for the basics. The world of "Ghost in the Shell" is not a utopian paradise, in which no one works, worries, or suffers. It is very much like the present world, with modifications made to how people interact with each other and how they get on in the world: creating income and spending it. This view is consistent with the history and nature of society. The basic nature of society does not change because of technological progress. Rather, small modifications are made day by day. Technology follows based on what people demand, not the other way around. Shirow, in creating the "Ghost in the Shell" world, anticipated a steady growth on what people have with what they will create. Likewise, he correctly foresaw the new benefits and complications that technological advancements and our interaction with them would bring. Human advancement, as it continues, is likely to bring about neither a completely idealistic society, nor a post-apocalyptic one. Shirow foresaw a society in which social structure, politics, economics and innovation all "get on as usual." This foresight is by far the most realistic sort of portrayal of a future society. Thus, "Ghost in the Shell: S.A.C." is the nearest fiction can come to an accurate portrayal of our future.

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# Aloha ʻĀina Kilohana

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ʻAuhea ʻoukou, e nā koa e holo pū ana i ke kai ehuehu, nā koa e kau pū ana nā maka i ka lani panopano i ka ua, nā koa e pulu pū ana i ka ʻehu o nā ʻale pā puaʻa, ʻo ia hoʻi nā ʻale e poʻi pū ana i ka waʻa, e kuʻu mau ʻau kai pae pū i ka ʻāina aloha, aloha ʻāina kilohana mai kākou.

Wahi a kahiko, "He poʻi nā kai uli, kai koʻo, ʻaʻohe hina pūkoʻa," ʻo ia hoʻi, kūpaʻa mālie kānaka i loko o ka wā pōpilikia.

Kau mau ana ka hoʻomanaʻo i kuʻu wahi waihona noʻonoʻo no ka huakaʻi ʻau kai mai Palamila a hiki mai i Hawaiʻi nei. ʻO Hōkūleʻa ka waʻa. ʻO Bruce Blankenfeld ka hoʻokele waʻa. He ʻumikumāmākolu lā i hala i ke kai pikipikiʻō i kau maka aku ai nā ʻau kai i ke kuahiwi kaulana kūhaʻo i ka mālie ʻo Maunakea. I ia manawa o ka holo, he ʻino wale nō, ʻaʻohe nō mālie iki a laʻi mai. A kū ke anahulu, he anahulu mao ʻole ia o ka ua, ʻeloʻelo wale ana nō nā ʻau kai, ʻaʻohe pakele. Ua hele kekahi a maʻi i ke anu, ua ʻike kekahi i ke poluea pū i nā ʻale halehale e hoʻolulilili mau ana i ka waʻa. Ua poʻipū ka lani i nā ao panopano, a i ke kau ʻana o nā maka o ka hoʻokele i luna, ʻaʻohe wahi hōkū e ʻike aku ai, ʻaʻohe nō hoʻi lā e ʻike ai i ke kau wale ʻana nō o nā ao. Eia naʻe, ua hoʻoholomua nō kāna mau ʻau kai me ka paulele nui pū i ua hoʻokele nei. I loko nō o ke poʻina o nā ʻale haoʻa, nā ʻale lau loa hoʻi, e pākī ana i luna o ka waʻa, a i loko hoʻi o ka haki ʻana o ka hoe uli, a nahae ke kāpōlena e pale ana I kahi e moe ai, ua holomua nō hoʻi nā ʻau kai me ke kūpaʻa. Ua hoʻomau ia mau koa ma ke kai ʻinoʻino me ka makaʻu ʻole. I loko nō o ka mania ʻana o nā maka i ka moe liʻiliʻi, i loko nō o ka ʻeha o nā puʻupuʻu e kau ana ma ka ʻūhā i ka pulu mau, i loko nō o ka hoʻomaopopo ʻole ʻana i ka nui o ka ʻino e kau mai ana, ua holomua nō hoʻi. He holo aku nō a he holo. Oi ua maila ka ua a hākālia, a i ka ʻonou ʻana o ka manu o ka waʻa i nā kai ʻewalu o Hawaiʻi nei, a pohā maila ka lā mai hope mai o nā ao, e like me ka nui o ka paʻu ʻana a hiki i ia wā, pēlā ka nui o ka ʻoliʻoli i waena o ko ka waʻa i ka ʻike ʻana aku iā Kānehoalani e hoʻomaloʻo ana i ka ʻaʻahu, i nā peʻa, a i nā kānaka i kona mau manamana hoʻopumehana. Pēlā hoʻi ka nui o ka hauʻoli o kānaka i ka pae ʻana o ka waʻa i uka, i ka hui hou ʻana me nā ʻohana, me ka mahalo nui pū i ua Bruce Blankefield nei i ka loea hoʻi o kona hoʻokele ʻana iā Hōkūleʻa Waʻa nō a pae i kula. He mea pakele ʻole ka hoʻi ʻana o Hōkūleʻa i kona one hānau, ʻoiai ʻo ua Blankenfield nei, aia hoʻi iā ia ka hoʻokele ʻana, ka uli ʻana, ke kilo ʻana i ola ai kākou.

No laila, e nā pūkoʻa hina ʻole i ke poʻi a nā kai uli me nā kai koʻo, nā koa hina ʻole hoʻi i ka wā pōpilikia, e kūpaʻa. E kūpaʻa kākou a holo. Holomua, holomau, holopapa, a pae kākou i ke kula o ka ʻāina kilohana. Aloha ʻāina kākou.

# Pepa Kālailai: Kahalu'u, Kona

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*Ha'awina Hawai'i 461, Hā'ulelau 2011, UHH*

*"'O Kahalu'u ua 'āina ala i ka wai puka iki o Helani"*

E Kona 'Ākau, mai Keahualono a Pu'uohau, mai ka wai kau i ka maka o ka 'ōpua. E Kona Hema, mai Pu'uohau a Kaheawai, mai ke kai mā'oki'oki, ke kai pōpolohua uli, a ke kai malino a 'Ehu. Eia nō ho'i kāu mea kākau e noho ana me ka nanea i ke aho lawe mālie a ka makani 'Eka o ua 'āina nei, i ka la'i kupolua a 'Ehu, a e kilohi pū ana nō ho'i i ka la'i o ka 'ōpua, ka 'ōpua halihali wai o ua 'āina kaulana nei, 'o ia ho'i 'o Kona kai 'ōpua i ka la'i.

'O Kahalu'u ua 'āina ala i ka wai puka iki o Helani i Kona ka 'āina. 'O Kahalu'u ka makuakāne, 'o Keauhou ka makuahine, 'o Mākole'ā ke kaikamahine kaulana o kona u'i mai kekahi kihi a i kekahi kihi aku o ia 'āina nei. 'O Laenui lāua 'o Kehau nā manō kia'i o ke kai kū'ono o ia wahi nei. He makani Ma'a'akualapu ko Kahalu'u a he ua ililani ko ia nei. I loko nō o ka nui o ka 'ike a me ka nui o nā mo'olelo ma Kahalu'u, e kālele ho'i ana au i ka inoa o Kahalu'u a me ka mo'okū'auhau o ia 'āina, a e kālele pū ho'i i ka mo'olelo no ka pā pōhaku e moe mālie nei ma ke kai kū'ono o Kahalu'u.

'O Kū ka makuakāne, 'o Hina ka makuahine, 'o Kepaka'ili'ula ka huamoa a lāua. 'O Ki'ihele lāua 'o Ki'inoho nā 'anakala ona. Ulu a o'o ua huamoa nei i kanaka maika'i. Ma ka mo'olelo 'o Kepaka'ili'ula ua 'ōlelo 'ia kekahi māhele no ka mo'okū'auhau o ka 'āina kaulana 'o Kahalu'u. I ko Kepaka'ili'ula ulu 'ana a 'ōpio, ua kipa hele nā 'anakala 'elua a puni ka mokupuni 'o Hawai'i i wahine nāna. Hiki maila lāua i Kahalu'u, i ka 'āina wai puka iki o Helani a 'ike akula iā Mākole'ā e noho mālie ana. He wahine helu 'ekahi 'o ia o kona u'i a puni 'o Hawai'i nei. A lilo nō 'o ia i wahine na Kepaka'ili'ula. I 'ae aku ka hana o Kahalu'u i ka pilina ma waena 'o Kepaka'ili'ula lāua 'o Mākole'ā, ua pā pūhihio mai ka makahi Ma'a'akualapu a pa'ē ua 'ōlelo no'eau kaulana o Kahalu'u a puni o Hawai'i. "'O Kahalu'u ua 'āina ala i ka wai puka iki o Helani." 'O ia ho'i ka wai e puka ana mai ka māpuna wai, i kapa 'ia 'o Helani. A ho'omaika'i ka makuahine iā lāua.

He mau mana, a kālailai 'oko'a i ho'opuka 'ia no kēia mo'olelo i pili i ka mo'okū'auhau o Kahalu'u. Ma nā lā 'umikūmākolu me iwakālua o Malaki i ka makahiki 'umikūmāwalu kanaonokūmākolu i pa'i 'ia kekahi mana o ka mo'olelo 'o Kepaka'ili'ula ma ka nūpepa 'o Ka Hōkū o Hawai'i, na David Malo. Wahi a ia mo'olelo nūpepa, 'o Kahalu'u ka makuahine, 'o Keolonāhihi ka makuakāne, 'o Mākole'ā ke kaikamahine a lāua. Hoihoi kēia 'ikepili 'oiai 'a'ole lohe nui 'ia 'o Kahalu'u he wahine.

Eia kekahi, 'o Henry Kekahuna, he kua'āina 'o ia no Maui. Kaulana 'o ia no kona 'ao'ao 'ike ku'una no nā wahi pana ma nā 'āina o Kaua'i a me Kona. Ua kōkua 'o ia i ka Bishop Museum, ka National Park Service, a me Kenneth P. Emory, he kanaka kālaikanaka. Ua kōkua pū 'o ia me nā wahi pana a me nā mo'olelo o ka wā kahiko 'oiai ua nui kona 'ike no ia mau mea. Ua palapala 'o ia i nā heiau, nā pā pōhaku, nā lokowai, nā paena wa'a, nā lae a pēlā wale aku ma Kona. Ma kāna ki'i no ka 'ahupua'a 'o Keolonāhihi, ua palapala 'o ia i kekahi kai kū'ono. 'O ia kahi a ke ali'iwahine 'o Keolonāhihi i hele ai i ka he'e nalu. Kapa 'ia ua kai kū'ono 'o Ka Nalu o Kamoa. No laila, ma ia kuana'ike, he wahine 'o Keolonāhihi a he kāne 'o Kahalu'u.

Ma kā Fornander puke, 'o Fornander Collection of Hawaiian Antiquities and Folklore (1917, IV: 498-517), ua 'oko'a ia mana o ka mo'olelo ma ka 'ao'ao mo'okū'auhau kekahi. Wahi a ia mo'olelo, 'o Kahalu'u ka makuakāne, 'o Keauhou ka makuahine, 'o Mākole'ā ke kaikamahine a lāua. 'A'ole i kāko'o 'o Kahalu'u i ka pilina ma waena o kāna kaikamahine a me Kepaka'ili'ula, akā ma ka nūpepa 'o Ka Hōkū o Hawai'i, ua kāko'o piha o Kahalu'u (wahine) i ka pilina. No laila, ua 'oko'a loa ma kēlā 'ano 'ike ku'una o ka wā kahiko. Ma kēia kūmole ho'i o ka mo'olelo, 'ike 'ia ke kāko'o o ke kūmole maiā Henry Kekahuna mai, 'oiai 'o Keolonāhihi ke kaikamahine a 'o Kahalu'u ke kāne. Ua 'ano pili ia mau mana ma ke keka o ka po'e.

Ua loa'a hou kekahi kūmole, no laila mai ka inoa piha 'o Kahalu'u. Ma ka mo'olelo 'o ke Ka'ao Ho'oniua Pu'uwai no Kamiki, ua 'ōlelo 'ia ka inoa piha no ia 'āina. 'O Pōhaku-o-Kāne ka makuakāne, 'o Kapa'ihilani ka makuahine, 'o Kamiki lāua 'o Maka'iole nā keiki a lāua. Ua māka'ika'i lāua i ka 'āina 'o Kahalu'u a 'ike i ka nani o nā kumu hau a me nā kumu niu. 'O Kahalu'ukaiākea ka inoa o ke ali'i a no laila mai ka inoa piha o ka 'āina. Helu pū lāua i ka u'i o kāna kaikamahine 'o Mākole'ā a me ka u'i ho'i o ka 'āina. E like me ke kaona o ka 'ōlelo no'eau ma lalo iho, pili ko Mākole'ā u'i i ka u'i o ka 'āina. "'O Kahalu'u ua 'āina ala i ka wai puka iki o Helani."

No laila, ma ia mau kūmole a pau, ua like ke kaikamahine, 'o Mākole'ā ia. 'A'ole na'e i like nā mākua ona. 'O kekahi mau kūmole, he kāne 'o Kahalu'u a 'o kekahi mau kūmole, he wahine. I loko nō o ke kānalua 'ana i ke keka 'o Kahalu'u, ua nui ho'i nā mo'olelo kaulana o ia wahi. 'O kekahi mo'olelo kaulana, 'o ia ho'i, ka mo'olelo o nā menehune.

I hele aku a nānā i ka pā pōhaku ma Kahalu'u, 'a'ole ia he pā pōhaku ma'amau. I ka wā kahiko, iā Kaleikini e noho ali'i ana ma Kahalu'u, ua kauoha 'o ia i nā menehune e kūkulu i kēia pā pōhaku i mea e hānai ai ka i'a a lilo i lokowai. He mea mau i nā menehune ka ho'okō wale 'ana aku nō i ka hana i ka pō, 'a'ole ma ke ao. No laila, wahi a kekahi mo'olelo maiā Kona Historical Society: Nā Mo'olelo O Kona, ua 'ōlelo 'ia ua ho'omaka nā menehune e kūkulu i ka pā pōhaku mai Inikiwai mai, 'o ia kekahi wahi ma Keauhou. A ma ia wahi aku i ka 'Ākau, ua ho'omau nā menehune a i Kaumaha'ole, 'o ia ka lae o ka pā, kahi i pau ai ke kūkulu 'ia 'ana o ka pā pōhaku e nā menehune. No laila, ma kahi o ka 'ekolu kaukani 'eiwa haneli kapua'i ka lō'ihi o ia mea he pā pōhaku.

Eia na'e, wahi a kekahi kūmole 'o Kepā Maly, he kanaka ho'opa'a mo'olelo o ka wā kahiko mai Lāna'i mai, ua 'ōlelo 'ia ma kāna pepa no nā mo'olelo o Kona, ua ho'omaka ka pā pōhaku ma Kauako'eko'e. He wahi ia ma uka koke o Inikiwai, ma kahi o ka 'eiwa haneli kapua'i a 'oi aku a emi mai paha. A ua ho'omau ia pā a hiki i ka lae o ka pā pōhaku i kapa 'ia ai 'o Ka Lā'au o Kaleikini. Wahi āna, he 'ekolu kaukani kapua'i ka lō'ihi o ia pā. 'O ke kumu ho'i i pa'a 'ole ai ka pā pōhaku i nā menehune, 'o ia ho'i, ua 'o'ō 'o Hinamoa, ke ali'i o ka heiau 'o Ku'emanu a ua kū nā menehune i kā lākou hana. He hana 'apiki ia ma muli o kona hoihoi i ka he'e nalu, ua 'ike nō 'o ia inā ua pa'a ka pā pōhaku, 'a'ole hiki ke he'e nalu ma ke kai kū'ono 'o Kahalu'u ma ia mua aku. A no laila, ua hana ma'alea 'o Hinamoa i mea e mau ai ka hiki ke he'e nalu ma Kahalu'u. I kēia mau lā, 'o Ka Nalu o Kaleikini ka inoa o ka po'ina nalu ma kahi o Ka Lā'au o Kaleikini, kahi e kū nei ka pōhaku hope loa o ka pā pōhaku. A 'o ia ka mo'olelo o ka pā pōhaku ma Kahalu'u.

No laila, ma ka mo'olelo o nā menehune, ua 'oko'a nā palena o ka pā pōhaku a me ka lō'ihi. Wahi a kekahi, mai Inikiwai a i Kaumaha'ole, a wahi a kekahi, mai Kauako'eko'e a i Ka Lā'au o Kaleikini.

Me ia mau 'ike hou, ua hiki ke 'ike 'ia ka 'oko'a o nā mana o kekahi mau mo'olelo no ka inoa 'o Kahalu'u a me ka pā pōhaku o nā menehune. He mau 'ike waiwai nō ho'i kēia no ke kālailai 'ana i ua 'āina kaulana no ka wai puka iki o Helani.

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# Canadian Boom, Environmental Bust: The Tar Sands of Alberta

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*"Resources are not, they become."*
*– Erich Zimmermann*

The high price of oil has made the tar sands (also known as "oil sands") of Alberta a viable, and profitable, source of petroleum for Canada. There is a consensus that the days of "easy oil" are over; this, coupled with the rising global demand for fossil fuels, has paved the way for Canada to capitalize on their resource – one that was once thought too costly to extract on a large scale. This turn of events is an economic windfall for Canada, and the U.S., with its voracious appetite, is poised to benefit from the friendly influx of oil. However, there are many in America who would stand in the way of this (and the proposed Keystone XL pipeline), and there are many more who vehemently oppose the tar sand extraction process as a whole due to serious environmental concerns. These concerns, which include pollution, health issues (including cancer) of local people, water and energy usage in the extraction process, greenhouse gas emissions, deforestation, habitat loss, and wildlife mortality, have been a source of contentious debate. Despite these protestations, the infrastructure is in place, billions have been invested, and billions more stand to be made from Alberta's oil sands. Canada will sell to whoever will buy – if the U.S. does not approve the Keystone XL pipeline then TransCanada will build one west through British Columbia and sell to China. In lieu of a cleaner, cheaper (or actually, more profitable) alternative, the U.S. looks for ways to secure her energy future and it seems importing Alberta's oil sands is an inevitable fate.

Between 50 and 100 million years ago, underneath the Rocky Mountains, crude oil from shale was released and found its way east and north into sedimentary sand deposits, and thus, these Alberta tar sands were formed (Gray, Xu & Masliyah, 2009, p. 32). Centuries before European contact, aboriginal peoples of northeastern Alberta were aware of, and utilized, the area's tar sands for such tasks as repairing canoes (Weinhold, 2011, p. 119; Atkins & MacFayden, 2008, p. 78). As early as 1800 Europeans noted the existence of these tar sands, but it wasn't until the 1920s that a way to extract the bitumen was discovered, and this method, using aerated hot water, was commercialized in the 1960s (Gray et al., 2009, p. 32). Now that nonconventional sources of oil such as tar sands can feasibly be extracted and brought to market, Canada has the world's second largest proven reserve of oil with over 170 billion barrels recoverable (Atkins & MacFayden, 2008, p. 77; Gray et al., 2009, p. 31; Kasoff, 2007, p. 177), all lying underneath 140,000 km² of boreal forest (Tenenbaum, 2009, p. 151). Current production from this area is about 1.3 mb/d and is projected to reach 3 mb/d by 2018 (Timoney & Ronconi, 2010, p. 569; Schindler, 2010, p. 500).

To depths of up to 75m, strip mining takes place. First the forest must be cut, muskeg drained and overburden removed to reveal the oil sands, and then the ground is excavated (Ruby, 2010, p. 28). The clumps of tar sands are then brought by massive trucks to a crusher where it is combined with warm water, chemicals and turbulence to release the bitumen which is then separated from the tailings (Gray et al., 2009, p. 32). At depths beyond 75m, steam-injection wells are drilled which heats the bitumen to 250 °C to lower the viscosity enough to pump the oil to the surface; the heating process can take several days (Gray et al., p. 34-35). Both of these techniques pose unique problems. The strip-mining and extraction process requires about 3 barrels of water for every barrel of bitumen produced (Schindler, 2010, p. 500), which results in a toxic sludge. Some of this water can be recycled, but for the most part it ends up in the tailing ponds, and Natural Resources Canada admits that the projected production of 3.3 mb/d by 2020 will require an amount of water "that would not be sustainable because the Athabasca River does not have sufficient flows" (as cited in Nikiforuk, 2008). The steam-injection, or in situ, extraction process uses far less water, but the energy required to heat the oil is significant. Natural gas is the current fuel of choice for this process, which Nikiforuk likens to "burning a Picasso for heat" (as cited in Ruby, 2010, p. 28). Regardless, there are plans to build a pipeline from hundreds of kilometers away to transport the gas to the site. While this may seem unreasonable, the other options are far worse – coal would produce far more greenhouse gases, and the possibility of using nuclear energy to create heat would create even more problems with waste. Despite this fact, some politicians in Alberta are strong proponents of expanding into nuclear power to fuel the tar sands operations (Pasqualetti, 2009, p. 258). As it stands now the current extraction processes of bitumen leaves a heavy carbon footprint. Farrell and Brandt published in 2007 that "the extraction and refining of oil sands produces 30-70% more greenhouse gas emissions than conventional oil production" (as cited in Tenenbaum, 2009, p. 155). In 2020 it is predicted that production of bitumen from the oil sands will be more than 3 mb/d; if true then the output of CO2 will increase from 30 million tons (2004) to 95 million tons (2020) (Pasqualetti, 2009, p. 257).

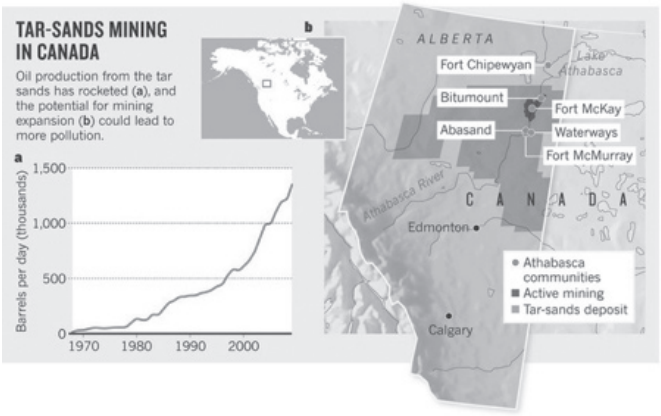
Strip mining and the bitumen extraction process produce tailings, which is a mixture of water, clay, residual hydrocarbons, brine, silts and sands (Chalaturnyk, Scott & Ozum, 2002, p. 1025). Also included in the mix are a number of toxic chemicals and metals, including naphthenic acids, benzene, arsenic, lead, chromium and mercury (Weinhold, 2011, p. 129). There is concern about seepage into adjacent waterways that lie directly alongside the mining sites and ponds. Many studies have

been done that directly contradict one another; David Schindler, an ecologist with the University of Alberta, points out the lack of solid scientific testing and thus formed a research group of experts to test the waters of the Athabasca River. While the industry claims that contaminants in the river are naturally occurring due to normal bitumen leakage from the surrounding lands, Schindler's team found that "industry added substantially to the natural contaminant loading" (2010, p. 501). However, industry tests generally show that there is little to no seepage at all, but readily admit that eventually the ponds must be reclaimed which has resulted in a "long-term environmental concern" (Ferguson, Rudolph & Barker, 2009, p. 1459).

Tailing ponds pose a threat to more than just waterways. These large ponds appear no different to migrating birds than any other bodies of water, and despite industry-instituted deterrents such as "floating and beach effigies, propane scare cannons, and sound-producing systems" (Timoney & Ronconi, 2010, p. 569), birds still land in the ponds, become soiled, and many die. As the tar sands industry expands so will the size and number of these ponds which lie along key migration routes. The National Resources Defense Council projected that, with expansion, the cumulative amount of bird deaths will range from 6 to 166 million in the next 30-50 years, with no practical mitigation measures yet known (as cited in Pasqualetti, 2009, p. 258).

It should be noted that currently there are 65 square miles of tailing ponds (National Resources Defense Council et al., 2011, p.5). However, migrating waterfowl are not the only wildlife which are potentially disrupted by tailing ponds and the mining operations as a whole. Deforestation and land degradation can affect the biodiversity of the entire region by interrupting connectivity between habitats. These disturbances alter movement of species such as the woodland caribou (Rangifer tarandus caribou), which in turn affects migration, foraging and reproductive behaviors, all of which may lead to the loss of ecosystem function (Ruby, 2010, p. 28; Sherrington, 2005, pp. 80-81).

While wildlife, landscape, and ecosystem damage can be devastating and possibly irreversible, the effects of contaminated water and food (fish, moose, waterfowl, etc.) may be presenting in humans as deadly forms of cancer. In Fort Chipewyan, which is a native community downstream from oil sands development, local doctor John O'Connor noticed a higher incidence of cancer in this small area (Tenenbaum, 2009, p. 153). The development's stakeholders quickly moved in to discredit the findings and as well as Dr. O'Connor. While more investigation is warranted, in A Study of Water and Sediment Quality as Related to Public Health Issues, Fort Chipewyan, Alberta (2007), ecologist Kevin Timoney stated that, as a result of his research, he believes that the Environmental Defence's report (which stated that an estimated 11 million liters of contaminated water seeps out each day into area waterways) is conservative, and that the actual amount is probably far greater (as cited in Tenenbaum, 2009, p. 153). Timoney also noted that Fort Chipewyan is situated in a depositional basin where toxic chemicals and metals settle and accumulate in the sediment. According to the study Cancer Incidence in Fort Chipewyan, Alberta, 1995-2006, "the number of cancer cases overall was higher than expected," but went on to note that this could be due to many contributing factors and deemed further study was necessary (Alberta Cancer Board, 2009, p. 10). However, as the people inhabiting this area rely on fish as their major source of protein, it should be noted that adult fish caught downstream of these tar sands operations have been found with lesions, deformities, and cancerous tumors (Schindler, 2010, p. 500; Tenenbaum, 2009, p. 154).




Source: HIS CERA, CAPP

The energy company TransCanada proposed in 2008 to extend the current Keystone pipeline from Alberta to the Gulf Coast where there are refineries capable of processing the bitumen into usable fuel. This addition would increase the amount of oil imported from Canada from 720 million barrels to nearly a billion barrels annually (an estimated increase of 255 million barrels of oil) (Guarino, 2011). There have been protests and many outspoken opponents about this pipeline, focusing on the potential environmental impacts. In July of 2010 an oil leak occurred on the Kalamazoo River near Marshall, Michigan, dumping 840,000 gallons of diluted bitumen ("DilBit") (Natural Resources Defense Council (NRDC), 2011, p. 6; Brower, 2010). This drew attention to bitumen, Canadian pipelines, potential accidents, and the Keystone XL which is moving forward but has yet to gain Presidential approval – the decision making has been postponed until 2013.

In a classic rivalry between liberals and conservatives, the Keystone XL pipeline polarizes those to the left or right – left if you think the environment is worth more than oil and the jobs that would go with it, and right if you put profit above all else, and/or feel that this pipeline is the key to the U.S.'s energy security. Environmentalists have a laundry list of concerns about the pipeline running through America's heartland. Heavy bitumen is quite caustic and corrosive, and

must travel at higher temperatures and pressures than conventional crude; however, the pipe being used to build the pipelines (including the current Keystone) use "conventional pipeline technology" which increases the chance for leaks and blowouts, and it is this suspect piping that would run over the Ogallala Aquifer which provides drinking and agricultural water for much of the Midwest. TransCanada had volunteered to reroute the pipeline, but the decision is still delayed as a new EIS must be undertaken. Opponents to the pipeline argue that the U.S. should focus on alternative, renewable fuel rather than lock in to a long-term relationship with dirty oil, water and energy use, wildlife, GHGs, etc (NRDC, 2011, pp. 3-4). Conservatives generally feel that the jobs that would be created and the access to friendly, local oil trumps everything else. Both sides certainly have a point.

Major Canadian/U.S. pipelines and water bodies


Figure 1 Source: http://switchboard.nrdc.org/blogs/lizbb/the_keystone_xl_tar_sands_pipe.html

Tar sands development is moving full steam ahead, and unless the price of fossil fuels drops precipitously it seems nothing short of an epic miracle (or disaster) will stop its progress, or progress of the Keystone XL pipeline. This means energy security for the U.S., and considering that China will buy every drop the U.S. rejects, the issue becomes even more politicized. Tar sands – is just about everything about it dirty? Yes. Will that fact change or halt or do anything to stop its production? No. With new technologies petroleum is here to stay, at least for a while longer, and from an economic and security standpoint the U.S. would be foolish to not benefit from Canada's resource.

*"We're either going to be dependent on dirty oil from the [Persian] Gulf or dirty oil from Canada … until we can get our act together as a country and figure out that clean, renewable energy is in both our economic interests and the interests of our planet."*
*-Secretary of State Hilary Clinton, 2010*

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# Fungi for bioremediation of hydrocarbon pollutants

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Fungi are the decomposers in the global cycle of life and death. They are usually there to do the work when anything--animal, plant, or even non-living object--is ready to be broken down again into its molecular constituents. Fungi are found in soil, in fresh and sea water, inside the bodies of plants and animals, and traveling through the air as spores. While they often are found functioning together with bacteria and an array of microorganisms, it is fungi that can especially handle breaking down some of the largest molecules present in nature (Fernandez-Luqueno et al. 2010). Their growth patterns facilitate the investigation of a wide range of environments in search of energy sources. Fungi can either grow in a multicellular form, with the somatic mycelium extending minute root-like structures through the substrate; or it can be present as unicellular yeast. Some fungi exude extracellular enzymes which allow for digestion of energy sources in their surroundings and further diffusion of these molecules through the substrate towards the fungus (Mai et al. 2004). If fungi occupy the niche of decomposers, then what is their particular relationship with the ever-increasing quantity of stuff that humans have manufactured and left to rot?

One of the largest categories of inputs to the environment in need of decomposition is man-made hydrocarbon waste. Large reserves of hydrocarbons that were previously stored deep underground are being brought to the surface, altered, and used. A majority of the pollution that occurs now involves fossil fuels, whether it is the exhaust and byproducts of spent fuel or the accumulated polymer plastics made from these same hydrocarbons. Fossil fuels are composed of polycyclic aromatic hydrocarbons (PAHs), as well as shorter carbon molecules. Many PAHs are naturally occurring (Prenafeta-Boldu et al. 2004) in plants and animals; these were the raw ingredients that first decomposed to form fossil fuel reserves. PAHs are building blocks of life, and they are very common on the planet. However, the accumulation and chemical alteration of these PAHs are following a pattern now dominated by the actions of humans (Prenafeta-Boldu et al. 2004).

PAHs form when carbon materials are not completely burned: for example, sooty exhaust from cars, charbroiled hamburgers, and burnt toast contain them. Furthermore, large amounts of PAHs are extracted, refined, and transported, and contamination of the environment occurs frequently all over the world. Burning fossil fuels, manufacturing gas and coal tar, wood processing, fuel-burning kitchen stoves, and incinerating waste are some of the ways PAHs escape into the environment. This is some of the most widespread pollution in the world, and because of the hydrophobic nature of PAHs, they can easily accumulate in fatty tissue and spread throughout the food chain. Seven of the sixteen PAHs listed as pollutants by the EPA are carcinogenic, teratogenic, and mutagenic. Current ways of dealing with polluted sites include removing the soil or incinerating it (Steffen et al. 2007).

The build-up of waste polymers is also a worldwide problem. Polymers are manufactured from hydrocarbons; a wide variety of chemical additions and structural alterations produce the wide array of plastic products available today. These products need to be resistant to degradation when fulfilling their uses, yet they also need to be able to degrade later or their disposal problems will only increase (Jecu et al. 2010). Global synthetic plastic production is 140 million tons per year, and this rate has been steadily increasing since the 1930's. It is estimated that 11% of landfill volume is made up of waste plastics (Gautam et al. 2006). So can the decomposers of natural detritus also go to work on materials altered and concentrated by humans? As so many polluted sites exist, the opportunity for fungi to evolve in their presence is ongoing. Leahy and Colwell (1990) looked at the fungal populations in areas contaminated with hydrocarbons, such as the Athabasca Oil Sands of Canada, and found the populations in these areas were much better at degrading hydrocarbons. Similarly, Llanos and Kjoller (1976) observed that after oil-waste application to the soil, the resident fungi increased their mycelial biomass, and that the community shifted towards dominance by three genera: *Graphium, Fusarium,* and *Penicillium*. Early studies such as these led to more work on the genetic level. Fernandez-Luqueno et al. (2010) report that expression levels of genes that code for degradive enzymes increase after exposure to hydrocarbon pollution, and that these genes are selected for during adaptation to the new, PAH-rich environment.

Fungi possess these decomposing abilities to deal with the array of naturally-occurring compounds that serve as potential carbon sources. Hydrocarbon pollutants have similar or analogous molecular structures which enable the fungi to act on them as well. When an area is contaminated, the ability to deal with the contamination and turn it into an energy source is selected for within the fungal population and leads to a population that is better able to metabolize the contaminant (Fernandez-Luqueno et al. 2010). Furthermore, Peng et al. (2008) report that the genes responsible for PAH degradation are present as many homologous loci within the genome, which provides a particularly large pool of mutation and rearrangement possibilities within that gene family.

In addition, microorganisms have within them a number of other stress responses that generate more phenotypic and genetic diversity so that they can deal with a new environmental stress (Fernandez-Luqueno et al. 2010). In one study, sexual reproduction in soil fungi was found to increase under ecologically stressful conditions (Grishkan et al. 2003). This shift in reproduction increases genetic diversity, and it can be seen at different

levels within the fungal community. At the species level, the sexual ascomycetes increased in their relative abundance to asexual fungi as stress in the environment increased. At the level of the individual, they found the sexual fungi spending more time in a teleomorphic state (sexual ascospore state) versus an anamorphic asexual state when stress levels were higher. They hypothesized that residence of the fungi in an extreme environment that is often changing leads to selection for the ability to adapt. This is expressed through selection for genetic diversity and individuals' responses to stress such as increased sexual reproduction (Grishkan et al. 2003).

These observations point to fungi's ability to adapt to changing environments. Gautam et al. (2006) also point out that fungi have had less than 100 years in which to evolve in the presence of synthetic plastics and many other pollutants. Abilities that have not been found yet in fungi relating to the degradation of pollutants could be evolving right now in some very polluted pocket of soil.

Fungi are especially well-suited to PAH degradation relative to other bacterial decomposers for a few reasons. They can degrade high molecular-weight PAHs, whereas bacteria are best at degrading smaller molecules (Peng et al. 2008). They also function well in non-aqueous environments where hydrophobic PAHs accumulate; a majority of other microbial degradation occurs in aqueous phase. Also, they can function in the very low-oxygen conditions that occur in heavily PAH-contaminated zones (Fernandez-Luqueno et al. 2010). A review of different studies by Fernandez-Luqueno et al. (2010) yielded a list of over 51 fungal species or species groups that are successful at degrading different PAHs. A wide variety of fungi have evolved effective mechanisms to attack specific PAHs. One reason for this ability lies in the similarity between lignin, a long, aromatic family of molecules that is present in wood and PAHs. Lignin is one of the main components of woody tissue in all vascular plants along with cellulose and hemicellulose. It has been described as the cement in woody tissue that adds strength and flexibility to cellulose. This is the substance that gives trees the strength to grow taller towards the light and provides the crunch of vegetables (McCready 1991). Fungi produce extracellular enzymes to degrade lignin, which cannot pass through the cell walls of microorganisms. This process of degradation is called mineralization, and the end product is carbon dioxide. Since lignin is comprised of many different aromatic rings in long varied chains, the fungal enzymes for mineralization are non-specific and frequently can also mineralize PAHs (Mai et al. 2004).

The oyster mushroom, *Pleurotus ostreatus*, can degrade 80-95% of all PAHs present in soil after 80 days (Steffen and Shubert 2007). This is a wood-rotting fungus, part of a group known as white rot fungi. Many species within this group have been studied extensively and found to be ubiquitous PAH degraders: among them *Phanerochaete chrysosporium* and *laevis*. These basidiomycetes have at least two pathways. One pathway is the cyctochrome 450 system, much like the system in mammal livers which break down large molecules into metabolites; however, many of these metabolites are toxic themselves. The lignin extracellular degradation pathway is preferable because the metabolites are fully broken down into carbon dioxide. Peng et al. (2008) suggest that a mixture of white rot fungi and bacteria could function best at PAH degradation, as the fungi break down the largest molecules into low molecular weight PAHs, and the bacteria can then act on those molecules.

Litter-decomposing basidiomycete fungi also have substantial ability to degrade PAHs. Although their performance is not as high as typical white-rot fungi, litter-decomposing fungi are native to the soil environment in which most PAH contamination is found, and so their long term ability to exist and function in PAH-contaminated soil could be greater than that of the wood-inhabiting white-rot fungi (Steffen et al. 2002). *Stropharia rugosoannulata* was found to be the most efficient strain of basidiomycete for the removal of a variety of PAHs, doing away with over 85% of them after six weeks in experimental culture. These results occurred with the addition of manganese (II) to the culture; without this addition, performance was much lower. This shows that manganese peroxidase, one of the extracellular lignolytic enzymes, is an important component of the degradation that *S. rugosoannulata* performs (Steffen et al. 2002). In further testing of eight promising basidiomycetous fungi by Steffen et al. (2007), 60% of all PAH's present were decomposed by *S. rugosoannulata*, again the top-performing species.

Fungi attack plastic polymers as well; these come in a wide range of structures as lignin and are acted upon by different fungi species for different polymers. This decomposing ability is perhaps even more impressive than PAH decomposition. PAHs are naturally occurring, although altered and concentrated by human activity; plastic polymers on the other hand are thoroughly transformed by human processes, and they are designed to resist degradation. In one experiment, acrylic polymers were joined with lignin polymers to enhance decomposition. It was found that the white rot basidiomycetes known for lignin degradation specifically *P. ostreatus* could effectively break down polyacrylimide. This polymer is the superabsorbent material in diapers and hygiene products (Mai et al. 2004). Filip (1978) tested the ability of garbage landfill leakage fluid, teeming with the microorganisms that could thrive in a landfill environment, for its ability to degrade polyurethane. Polyurethane made from polyester (but not polyether) lost 35% of its mass after three months exposure to the fungi-enriched fluid. Clay in the mixture was found to greatly reduce the efficacy of this process (Filip 1978). *Cladosporium resinae* was found in another study to also degrade polyurethane (Gautam et al. 2006). Jecu et al. (2010) examined polyvinyl alcohol films under a scanning electron microscope and found substantial degradation by fungi, most notably *Aspergillus niger*.

Copolymerization with natural polymers such as starch or collagen increased biodegradation. These provide an additional carbon source for the fungi and may also provide access points for the fungi to invade the synthetic polymer (Jecu et al. 2010).

Sometimes the same fungi that degrade PAHs have been found to remediate toxic metals as well, which are commonly found in the same polluted sites and can reduce the effectiveness of some degradive microorganisms. Hong et al. (2009) surveyed gas station soil and found strains of *Fusarium* and *Hypocrea* that could degrade one carcinogenic high weight PAH, pyrene, as well as uptake copper and zinc. These strains were able to use the pyrene as their sole carbon source.
A few papers discuss the potential applications for fungal bioremediation. Fernandez-Luqueno et al. (2010) review the techniques below. Bioaugmentation involves bringing selections of effective fungi to contaminated sites, either from the lab or from older contaminated sites in which fungi have had ample chance to evolve degradive abilities. Biostimulation is adding nutrients such as N, P, K, Cu, or S to stimulate activity of the fungi that are native to the location Steffen and Hatakka (2002) utilized this method when they added manganese to a mixture of litter-decomposing fungi and contaminated soil. A host of organic materials could be added that would contain some of these nutrients as well, such as compost, food waste, and sewage sludge. Additionally, plants (especially grasses) can be added to increase fungal activity. Introduction of genetically modified microorganisms was discussed here as well, though the authors caution that the potential for their escape from the contaminated site makes this approach too dangerous to recommend at this time (Fernandez-Luqueno et al. 2010).

*P. ostreatus*, or the oyster mushroom, has been utilized in some bioremediation trials involving contaminated public grounds and appears to have been quite successful. It should be noted that the results discussed in this paragraph are from a non-scientific web publication. In one test, the Washington State Department of Transportation invited different groups with bioremediation ideas to try them out on heavy oil-contaminated soil from a truck yard. While other treatments failed to yield impressive results, the berm inoculated with P. ostreatus was covered in mushrooms as large as 12 inches in diameter after 4 weeks. 95% of the PAHs were removed in this time, and the mushrooms did not contain petroleum products. After the fungi used up the available food, a successional regrowth began as flies, then birds, and then seedlings of new plants recolonized the berm. The experimenters hypothesize that the fungi could be a keystone organism in restructuring PAH-contaminated areas. These same kinds of fungi were utilized again to help mop up oil washing up in San Francisco Bay after the tanker Cosco Busan spilled 60,000 gallons in 2007. The oil was soaked up from the shores using an innovative, highly absorbent mat made of human hair. Spores were introduced to the soaked mats and turned the entire product into carbon dioxide, water, and innocuous compost (Stametz 2010).

One paper reviewed here stands alone in its grim warnings of the potential dangers associated with fungi that can consume pollutants. Prenafeta-Boldu et al. (2006) found a correlation over many fungal orders of ability to decompose lignin with the ability to infect the human brain and cause neuropathy. These infections can be quite severe; *Cladophialophora bantiana*, in particular, causes a severe brain infection which is fatal without brain surgery and intensive follow-up treatment. Infections by this group of fungi are mostly fortuitous—the diseases are not passed between people, but are instead associated with environmental exposures. Inhalation of wood dust or coal fumes can bring on some of these infections, and infections have tended to occur in immune-compromised individuals (personal communication with Don Hemmes).

Why would there be this association? Fungi have evolved to decompose lignin; lignin's variable and large structure is very similar to polycyclic aromatic hydrocarbons, and the enzymes the fungi produce are nonspecific. The chemical make-up of the brain is also high in aliphatic and phenolic compounds and lipids (50% of the brain is composed of aliphatic lipids), which are similarly affected by the nonspecific lignin-degrading enzymes. Furthermore, dopamine, one of the main neurotransmitters throughout the brain, polymerizes into polycyclic aromatic rings and degrades into the same byproducts as lignin, making it another target of the fungi's enzymes within the brain.

A further correlation exists between fungi that can handle extreme conditions and neuropathogenesis. Fungi must be able to handle the high body temperature inside the body to survive in the brain; some of these infectious fungi have been found in saunas, hot tubs, hot springs, and coal waste piles. These same extreme conditions, as well as other extreme conditions such as low oxygen, are also present in PAH-contaminated soils. Hence, Prenafeta-Boldu et al. (2006) warn that the natural spread of these fungi due to widespread PAH pollution, as well as bioremediation efforts that utilize these species, could inadvertently spread disease agents to the human population. Fortunately, none of the species named within this review as species of great bioremediation potential were in genera mentioned by Prenafeta-Boldu (2006) as causes of human disease. Nevertheless this presents a serious reason for caution before any experimental use of fungal bioremediation is initiated.

Fungi have an astonishing potential to clean up contaminated environments. After looking at the list of fungi that can degrade different PAHs, one could imagine that there is a fungus out there to degrade every type of persistent pollutant, and each one only has to be found. Polluted sites can naturally become incubators for the few species that can consume the pollutant. This is welcome

news for a species that creates these polluted areas yet still needs a clean environment to survive. Furthermore, if this decomposing potential is real, should it be exploited by humans to aid in environmental clean-up? The notion of breeding effective populations from the epicenters of contamination is attractive, and it gives some redeeming value to those compromised sites. There are some risks as well. Regardless of human decisions, fungal communities will continue to interface with and attempt to consume pollutants. Research indicates that new populations of fungi can and will arise out of stressful environments to face the challenges of decomposition posed by a human-dominated world.

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# He i'a kokoke kā ka lawai'a

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Kau kehakeha 'o Wa'ahila i luna, ka wēkiu i hihi 'ia e ka lehua 'āhihi. Helele'i iho nā lihilihi pua i ka makani kula'i kanaka, nakanaka ka malihini i ka ua pokokapa.

Ho'okahi mea ho'omana'o a aloha ho'i ke no'ono'o a'e au i ko'u wā kamali'i. He wahi kaulana 'o Nu'uanu i ka uliuli, uluāhewa 'ia e nā mea kanu. Wahi a kūpuna, "Ho'ā ke ahi, kō'ala ke ola. 'O nā hale wale nō i Honolulu, 'o ka 'ai a me ka i'a i Nu'uanu." Mai ko'u wā kamali'i a hiki loa i ko'u wā 'ōpio, he mea ma'amau ka ha'alele 'ana o ko'u 'ohana mai ko mākou hale i Honolulu aku a hō'ea ma ka lua ho'oki'o wai 'o Nu'uanu e holoholo ai i uka. He wahi ki'owai kēia ma ka 'ao'ao ma Kona, ma kai koke o ka pali i kapa like 'ia aku 'o Nu'uanu. Ua piha kēia ki'owai i ka wai maoli o nā wailele a me nā kahawai o kēia 'āina pa'ū, a ua ho'opiha pū 'ia kēia wahi ki'owai i ka i'a 'o'opu pākē. A no kēia lua ho'oki'o wai nō ho'i 'o Nu'uanu ka mo'olelo i pa'a mau ma ko'u waihona no'ono'o.

Ho'okahi lā o ka makahiki, hele aku ko'u pāpā e kū'ai aku i palapala 'ae na mākou i mea e hiki ai iā mākou, 'o ka 'ohana ho'i, ke hele i ka lawai'a i ia mea he 'o'opu pākē. 'A'ohe na'e ho'okahi iwi o ko'u kino holo'oko'a i makemake iki e hele i ka lawai'a me ia, 'oiai he keu ko'u pāpā o ka 'o'ole'a i ka hanana lawai'a. Eia hou, pupuka kā ho'i kēia wahi i'a nei i kapa 'ia he 'o'opu pākē. Momona ho'i ke kino a walewale 'ino kona 'ili. 'O ka pololei, 'ae 'ia ka ho'ohana 'ana i 'elua mōkoi a ka mea ho'okahi na ia palapala 'ae, no laila ua hiki i ko'u pāpā ke lawe aku he 'umi mōkoi hui pū 'ia nāna iho nō e ho'ohana.

Ala mai mākou, ka 'ohana ma ke kakahiaka nui, ma mua o ka wana'ao, kau akula ma luna o ke ka'a, a holo aku i ka lua ho'oki'o wai, ma mua loa o ka wehe 'ana i ka pā uea a puni ke ki'owai. A hemo ka pā uea, komo akula nā ka'a a pau, a haele nui nā lawai'a i kahi a lākou e launa pū ai me kēia i'a i ake nui 'ia. 'O ka ma'amau, koho ko'u pāpā i kahi mamao loa e lawai'a ai, no laila ua pono mākou e holo loa ma ka 'ukele a me ka nāhelehele a puka aku ma kekahi 'ao'ao. A laila ho'omākaukau aku 'o ia i kāna mau mōkoi a kiola aku 'o ia i ka maunu i pa'a ma ke kaula. 'Emo 'ole, 'ike akula mākou i kona kaula e konikoni ana ma ka 'iliwai. Ualo maila ko'u pāpā ia'u e ki'i aku i ka 'upena kī'o'e a hō'eu'eu nō ho'i 'o ia ia'u no ko'u holo mālie 'ana. I nānā aku ka hana o māua, 'a'ole ka i'a , 'o ka 'alu honua maila nō ia o ke kaula, ua pakele maila ka i'a. Aia ho'i, wahi āna he iwakālua a 'oi paona ke kaumaha o kēia i'a, he pololei paha, 'a'ole paha. Ma ke au o ka manawa, ho'opukapuka mau 'o ia no kēia wahi i'a nei. 'Akahi mea aloha 'o wau.

Aia nō kēia lua ho'oki'o wai ke waiho nei ma Nu'uanu akā, ua pau ka lawai'a 'ana ma laila, no laila, aia nō paha kēlā wahi i'a ke holo hau'oli nei ma kona wahi pono'ī a hiki i kēia lā.

# The Aviation Empire Takes Flight

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In 1903, the Wright brothers' first powered flight lasted 12 seconds and went 120 feet. Today people get on and off jet-powered aircraft (commonly referred to as "jets") and are whisked around the world in a matter of hours. Obviously, the jet age is far from over. Many take air travel for granted; more concerned about the flavor of the airline food than the fact that they are travelling at over five hundred miles per hour, twenty-two thousand feet above the ground in a several hundred ton object. People traverse nations, continents and oceans—some for fun, some for work. How did we get to this point? What shaped the commercial aviation industry into what it is today? The aviation industry is a testament to the innovative quality that humans possess. Innovations are frequent and continue to mold the future of aviation. While progress in aviation has historically been driven by military development, competition now drives the industry. Currently, the two industry giants, Airbus and Boeing, push each other to build new and improved aircraft in order to impress the airlines and persuade them to purchase their jets.

To better understand just how amazing and innovative the aviation industry truly is, it is best to look back at history. One of the biggest steps is the first powered flight. The Wright brothers built their first aircraft flyer out of spruce wood. On December 17th, 1903 the brothers completed several runs which marked the first sustained powered manned flight in history—the shortest run lasting only 12 seconds and the longest lasting 59 seconds ("First Flight"). Two things happened from this flight: it first showed that flight is indeed possible, and secondly, it was the inspiration for many others to design and invent more advanced aircraft. As Matthew Lynn, the author of a history of Boeing and Airbus, put it, "[m]en had dreamed about flying for so long, the demand for the machines would be limitless. Creating an aerospace business was irresistible… challenge to entrepreneurs around the world" (15). Many people followed in the Wright brothers' footsteps, but only a few were notable in succeeding.

The main man to jumpstart the commercial jet age was De Havilland. Like many others he had caught the flying bug; by 1909 he had built a plane of his own (Lynn 17). De Havilland found that flying functioned more as an expensive hobby rather than a method of profit. When World War I came around, De Havilland was hired to design some of the first war planes for the Allies. One of the most famous airplanes was the DH4, which was nicknamed the "flying coffin" (Lynn 18). Between the First and Second World Wars, it was again a slow time with few people interested in the industry; however, "the Second World War transformed [the aviation industry]… from a fringe industry into a massive industry" (Lynn 22). The only reason that the aviation industry progressed in its early days was through military funding.

De Havilland designed and built the first commercial jet, the Comet, which marked the dawn of the commercial jet era. Being the first of its kind, the Comet entered service in 1952 for the British Overseas Airways Corporation (BOAC). At that time, no other companies had even progressed beyond drafting any competitive designs (Lynn 27-28). Despite its innovation, the Comet was also one of the biggest failures to hit the airline industry. Three Comets went down in less than four months, the first incident occurring in January, 1954. The first crash did not strike fear into the hearts of the people: plane crashes were inevitable, especially during that period of aviation. The second and third crashes occurred within six days of each other. Many theories emerged in the early stages of investigation, including sabotage, though international intelligence agencies ruled out that possibility fairly quickly as there was no evidence for a motive. These incidences worried De Havilland, as the only possibility was a fault in the design, but he hadn't an idea what it was (Lynn 11, 27-29). The crashes caused all the aircraft to be grounded; only after extensive testing was it discovered that "metal fatigue was causing the fibric [sic, fabric assumed] of the plane literally to come apart in the air" (Lynn 30). The Comet marked a new step in commercial aviation with the first passenger jet; however, it tragically showed how a fast paced, technological revolution could be devastating without thorough testing and research.

Despite such tragedies, aviation has grown tremendously. This colossal industry is currently worth more than $400 billion, and is projected to be worth $711 billion by 2012 ("The Global Airline Industry"). The two big players in this industry are Airbus and Boeing. Between both companies, they produce the majority of the wide body jets for the industry today. Each jet they produce ranges from about $110 million to over $147 million, depending on the model (Juan). Boeing and Airbus continue to push forward into the future, developing new jets to stay competitive.

Airbus was founded in the 1960s and 1970s to try to gain market share for European countries. During that time, the American companies dominated the global market; 90% of the market share was s split between Boeing, Lockheed and Douglas Aircraft (Olienyk, Carbaugh 1). The government of four major countries: Britain, France, Germany and Spain, made large financial commitments to the Airbus consortium. Airbus slowly began to "chip away sales" of Boeing and in 1997, in an attempt for US to stay competitive in the global market, McDonnell Douglas merged with Boeing to be the "sole producer of large commercial jetliners in the United States and resulted in an effective duopoly in the global market, with Airbus as the only other competitor" (Olienyk, Carbaugh 1-2). The formation of Airbus and the merger of Boeing and McDonnell Douglas show how

far companies and countries will go to hold the market share to stay competitive.

An excellent example of how cutthroat the industry became is the story of when Saudi Arabia introduced its airline, Saudia. The contract to build aircraft for Saudia was an important one, as it was worth $6 billion (Juan). This amount of money was important not only for Airbus or Boeing, but for their respective countries' economies. With the US behind Boeing and the EU behind Airbus, it was a battle for who would win the contract. In 1993, King Faud of Saudi Arabia received a phone call from President Clinton to consider Boeing for the thirty-plane contract (Lynn, 2). From the side of the EU, the French president Francois Mitterand flew over to Saudi Arabia, followed by Klaus Kinkel, German Vice-Chancellor and Foreign Affairs minister, all hoping to persuade King Faud to the side of Airbus (Lynn, 5-6). Many more political figures from both sides met with the king hoping they could sway his decision (Lynn, 7-8), and in the end, Saudia choose to go with Boeing for the contract. The airline had picked a manufacturer before ever choosing the aircraft it wanted, which is rare in the airline industry. This contract alone shows how competitive and deeply rooted the aviation industry is in global and national economies.

The aircraft manufacturers are constantly looking for new ways to beat each other by having the leading edge. With such a big industry, innovation is critical. Airplanes may not have changed too much in the terms of general appearance, but over the past 40 years from the release of the Boeing 747 to the development of the Boeing 787 a lot has changed. The new Boeing 787 is mainly made from composite materials such as carbon fiber, which is about 20-40% lighter than metal ("Changes in the air"). The Boeing 747 was about 15% composite, but the brand new Boeing 787 Dreamliners, which recently entered the market, are about 90% composite materials (Venables 7). It is estimated that it cost Boeing about $9 billion to research a new aircraft to succeed the Boeing 747 and compete against the Airbus A380 (Juan). All of these developments come at a high cost, but also propel the aircraft industry into the future with more efficient and sophisticated airplanes.

The 787 Dreamliner's delays have cost Boeing greatly - not only in profitability but in market share. The Boeing 787 has been delayed three years due to testing and developments because they are the first to try building an aircraft mainly from composites. Trying not to be a repeat of the De Havilland Comet, which was a first for many things but is now synonymous with falling apart, Boeing has done extensive testing to make sure that the new craft is safe to fly. As Susanna Ray from Bloomberg BusinessWeek writes, "[s]truggles with new materials and manufacturing processes extended testing to 20 months instead of the eight originally planned." The company has taken a full eight years to develop this jet and it has learned the delays allowed "more than $16 billion in inventory [to be] tied up in planes under construction" (Susanna 23). This delay has allowed Airbus to start development on its own composite aircraft, the Airbus A350 which is expected to be delivered in 2013. The reason for the shorter development period for Airbus is that they have chosen to take a lower risk approach, which includes fewer completely new systems, when compared to the Boeing 787 Dreamliner (Kesmodel, Micheals B1). The three year delay of Boeing means that the Boeing 787 will not be profitable for the company for at least the first 1,000 Dreamliners sold, and is not expected to make a true profit from the aircraft till the end of the decade (Susanna 23; Kesmodel, Micheals B1). Despite the delays, the Boeing 787 can still be profitable in the long run. It is the loss of market share and standing that is just as costly as testing, development, and construction.

The aviation industry is as strong as ever, despite the rocky past it has had. September 11th, the fuel crisis, development delays, and aircraft crashes have shocked but not slowed business down. Historically, the military has supported the development of aircraft; aviation prior to the World Wars was nothing more than an eccentric hobby in a fringe industry for those with enough money and an adventurous spirit. Now it is the competition between the two big giants, Airbus and Boeing, which pushes the envelope of innovation. Money from aircraft manufacturing reaches into the billions, funding research and construction of the next amazing airplane. The jet age is still alive, and the development and production of new aircraft continues. How the future of aviation will change is anyone's guess, but one thing is for certain: it will be amazing.

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# Transported Fauna and its Effects: New Zealand A Review of the Literature

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**Abstract**

Though they are regarded as pests all over the globe, invasive species have the biggest impact in the island environment. Effects of alien invaders are both swift and devastating, continuing on to native species decimation or extinction as well as landscape desertification and erosion. In New Zealand these examples have been documented repeatedly; and on an island that has evolved in isolation and without mammalian predators – including humans – native species have failed to develop, or have lost the ability to escape or defend themselves in the absence of danger over millions of years. This paper discusses the history of the major biological invasions and their immediate implications, the current conservation efforts and controversies, and possible benefits and further questions raised from species invasion in New Zealand.

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Fauna transported to any new environment can have short and long period effects. These effects are especially punctuated in island environments such as New Zealand, where there are many examples of how alien species alter a fragile landscape and ecosystem. In pre-human New Zealand, species evolved in isolation without mammalian predators or any other type of competition for resources (Harada & Glasby, 2000, p. 80). When the first Polynesians arrived in 1300 A.D., the first wave of biological invasion took place in the form of rats, dogs, and men. The second wave of invasion came by way of European travelers and Captain Cook in 1774; this invasion brought many more alien species to New Zealand. These species, including humans themselves, forever changed the local environment (Veblen & Stewart, 1982, p. 374).

In the big picture of biologic time, changes that occur to an island ecosystem and its endemic flora, fauna and landscape (due to invasive species within a few hundred or thousand years) can seem alarming and tragic. However, these benchmark traits – dispersal, colonization and extinction – have always defined life on Earth. Historically there have been invasions and extinctions of high magnitude that have impacted biota similar to our recent history: our recent, human-facilitated history (Brown & Sax, 2004, p. 531). Current conservation efforts in New Zealand focus on eradication and management of invasive mammals, a task that is costly (Parkes, Robley, Forsyth & Choquenot, 2006, p. 230) and could potentially put the native populations at a risk (Craig et al.., 2000, p. 68). Some would argue that eradication efforts are futile, and more emphasis should be placed on objectivity rather than getting caught up in subjective morality and ethics (Brown & Sax, 2005, p. 483). Regardless of whether the causes or the outcomes of species invasions are good or bad, it is clear that the impact of transported fauna in New Zealand is vast.

New Zealand's biota evolved without terrestrial mammals and remained isolated after it broke away from the mega-continent Gondwanaland about 65-80 million years ago (Craig et al., 2000, 62). This allowed for the native fauna of New Zealand to evolve without predators, and as a result, many bird species became flightless and ground-nesting (Pryde & Cocklin, 1998). When humans arrived (first a predecessor of the Maori around 800 A.D. and then the Maori in 1350 A.D.), they found a land inhabited by large ratites (large, flightless birds) and no terrestrial mammals. With them they brought the Polynesian rat and dog, and within the next 800 years they decimated both the native bird population and the native forests (Glasby & Harada, 2000, p. 85). In example, hunting extinguished all moa species during this time of human inhabitation, along with 21 other native bird species (Veblen & Stewart, 1982, p. 374; Diamond & Veitch, 1981, p. 499). The extermination of the moa resulted in further native species extinctions such as the New Zealand eagle, which was assumed to have relied on the moa for food (Milberg & Tyrberg, 1993, p. 234). The Maoris also eliminated "tuatara, some lizards, and some invertebrates…from the main islands," along with sea lions and seals in up in the North region (Craig et al., 2000, 63). In result of the hunting, the predation by the introduced dog and rat, the massive deforestation and burning of vegetation, it is estimated that "by the time of European contact in the latter half of the eighteenth century, Polynesians had already caused significant changes in New Zealand wildlife and vegetation" (Veblen & Stewart, 1982, p. 374).

The European colonization of New Zealand began in earnest after 1840, and with this came a new wave of biological invaders and habitat destruction (Glasby & Harada, 2000, p. 79, Veblen & Stewart, 1982, p. 374). Feral populations of European domesticated animals (for example pigs, goats, sheep, and cats) wreaked havoc on the native vegetation and fauna. Furthermore, land clearing for pastoral farming and timber claimed almost all that was left from the Maori deforestation (Glasby & Harada, 2000, 86). Europeans also introduced several species of wild animals, such as deer, rabbit and opossum; 138 species of bird were introduced between 1860 and 1880 alone (Veblen & Stewart, 1982 p. 374). The last 200 years has seen the extinction of "16 land birds as well as a bat, a fish, and a number of invertebrates and plants" (Craig et al.., 2000, p. 63). The North Island has seen immense land clearing, which made way for plantations of alien conifers, creating a destructive habitat for the island's native populations (Pryde et al., 1998).

As much as this is true, non-native species do not always cause problems in their alien landscape. For instance, in most gardens growing vegetables and flowers around the globe, one would be hard pressed to find

only natives being tended to. Most can be maintained and run no risk of being so successful that they choke out other species. However, there are a number of negative consequences that can result from transported species, and one is that they can become invasive. Many factors play a role as to whether one species is more successful than another, and if the alien species happens to land in an environment that has favorable climate, an open niche, or lack of predators, it can flourish and potentially become a dominant species. One of the biggest arguments for the eradication of invasive species is that they can lead to the extinction of endemic or unique species.

Extinction of native species can be a catastrophic end result of transported, alien fauna. Asteroid impact, climate change, plate tectonics and other major global events have contributed to mass extinctions in the Earth's past, though the current rate of human-assisted extinctions is unprecedented (Cassey, Blackburn, Duncan, Chown, 2005, p. 476). New Zealand's fauna, having evolved without mammalian predators, was especially vulnerable to human invasion and hunting. Many native birds of New Zealand had evolved to become flightless and quite large, which restricted their ability to escape hunters, making them susceptible to predation (Duncan, 2004, p. 510). There were other native birds that evolved to become flightless, but were too small to be of interest for humans as a food source; they were soon eliminated as well. However, as expressed earlier, humans are not the only invasive species to affect New Zealand and the extinction of endemics; cats, rats and dogs also preyed on these defenseless smaller birds. In the last 700-800 years, New Zealand lost nearly half of its entire vertebrate fauna, in addition to incalculable numbers of invertebrates (Craig, et al.., 2000, p. 63); this coincides with the arrival of man and his animals.

While extinction is detrimental to biodiversity, there are other consequences to introducing alien species. Some of these introduced animals contribute to the loss of habitat by grazing- grazing that eventually leads to erosion. Glasby and Harada points out that:

> The widespread clearance of land for pastoral farming together with the introduction of exotic browsing animals such as deer, rabbits and possums by early Europeans led to large-scale erosion, particularly in the case of the high country and in other erosion-prone areas. (2000, p. 89).

The land in New Zealand is young, brittle and affected by storms that further weaken the fragile landscape (Howard, 1964, p. 423). Grazing mammals exacerbate this natural erosion process, and the domesticated sheep has contributed to more erosion from grazing than introduced wild animals (Howard, 1964, p. 423).

A form of habitat loss other than erosion is known as deforestation (though this can lead to erosion). New Zealand was once a heavily forested place; now, only one quarter of that forest remains. This deforestation began when the Polynesians arrived; carbon dating shows that between 600 and 700 years ago, nearly 40% of New Zealand's forest was burned to make way for agriculture and to ease travel (Harada & Glasby, 2000, p. 85). When the Europeans settled in the 1800s, another 35% of the forest was claimed to facilitate the introduced grazing mammals such as sheep, deer and cattle (p. 86). Glasby and Harada (2000) state that, "it has been estimated that the standing mass of tussock grasslands is approximately 10% of that when Europeans arrived. Parts of these grasslands are now subject to desertification" (p. 86).

With numerous species having gone extinct and there is a great need for protecting the native species that are remaining. Hence, New Zealanders have had to rethink their conservation tactics time and again to ensure the protection of their remaining native species. Once it was thought to be a viable option to introduce even more alien species in order to try and control a predatory invasive one; "European stoats, for example, were introduced to predate on rabbits, but found it far easier to feast on flightless native birds than to chase elusive rabbits" (Pryde, et al.., 1998). Stoats were brought to New Zealand at the end of the 19th century for rabbit population control; they now "are known to kill up to 60% of all North Island kiwi chicks and wreak havoc on other native bird populations, killing far more than they need to survive" ("Media Release," 2001). Unintended, unforeseen and negative consequences to biological controls of invasives make this a questionable tactic. Current conservation strategies include transporting endangered birds to offshore islands from which all (or at the very least, most) mammalian predators have been eradicated – mostly rats and cats (Pryde, et al.., 1998, para. 1), to create and maintain "habitat islands" – man-made recreations of a particular avifauna's natural habitat, also free of predators (Pryde, et al.., 1998, para. 29). Though not all birds in need can be restored via these approaches, and though the maintenance of these habitats can be laborious and costly, in some cases it is very successful and warranted (Pryde, et al.., 1998, para. 42). Poisonous bait is another conservation tactic widely used today in an effort to control mammalian pests (Day, Matthews & Waas, 2002, p. 309). Though it is now widely accepted that wild mammalian pests will never be eradicated (despite the desire to do so), effort is made to control local populations with various poisons such as 1080 or cyanide (Parkes, et al.., 2006, p. 231). Unfortunately, there is collateral damage to this technique; sometimes the poisonous pellets intended for alien invaders are eaten by the species that is being protected (Day, et al.., 2003, p. 309). Craig, et al.. cites, "high costs, accumulation of toxins, nontarget game mammal poisoning, short declines in rare species, and public wariness of poisons are concerns" (2000, p. 68).

There is much evidence to indicate that alien and invasive species are detrimental to the native, endemic

populations. But is it possible that this trend is reversible or, despite the negative immediate consequences, invasive species might actually be neutral or even beneficial in the long run? New Zealand is without any native land mammals (aside from two bat species); of the 50 introduced mammals, it is the impact of the grazing animals on New Zealand's vegetation that is "widely perceived as an ecological disaster involving severe depletion of the plant cover and widespread accelerated erosion" (Velben & Stewart, 1982, p.372). However, it has been pointed out that determining the scope of the impact of introduced browsers and grazers such as the red deer and the Australian brush-tailed opossum are difficult. While detrimental effects of these animals in the forests may be happening, the disproportionate amount of mortality occurring in the native forests might be due to natural changes in the vegetation apart from any introduced animals (Velben & Stewart, 1982, p. 393). It seems that not only are New Zealand's plants and animals unique, but that its landscape processes might be as well, which makes it hard to predict whether the long-term effects of alien species such as the red-tail deer or opossum are truly negative to the native landscape and deserve such attention and resources focused on their eradication. Ewel and Putz feel that:

> Blanket condemnation of alien species in restoration efforts is counterproductive. Where their presence does not unduly threaten surrounding ecosystems, alien species can be tolerated or even used to good advantage, if they provide essential ecological or socioeconomic services. By speeding restoration or making it more effective, non-native species can provide economic and ecological payoffs. Risk is always an issue when alien species are involved, but greater risk taking is warranted where environmental conditions have been severely modified through human activity than where reassembly of a biological community is the sole goal of restoration (2004, p. 354).

Though much is made of the decrease in biodiversity in local environments, it should be noted that species invasion results in an increase in species richness globally and often locally as well. In 2002, Sax, Brown and Gaines found that across all oceanic islands (including New Zealand), "neither plants nor birds have seen a decline in species richness...the richness of plants has increased dramatically, while the richness of birds has remained relatively unchanged" (p. 770). It should also be noted that species richness does not differentiate between indigenous and alien components, and there is concern about this kind of homogenization of biotas across the globe which could diminish "ecological integrity" (Sax et al.., 2002, p. 776). But in 2005 Brown and Sax point out that if an ecosystem continues to function in a healthy way (even though the processes have changed), it is nearly impossible to prove scientifically that true degradation has occurred (2005, p. 482). If the preservation of biodiversity is the main goal of the conservation movement, then it should be recognized that, ultimately, the incidence of exotic species are actually beneficial (Briggs, 2006, p. 197). Brown and Sax argue:

> Is this decrease in global biodiversity a bad thing? Is the net increase in local species richness a good thing? Is high species richness desirable? We do not believe that these are scientific questions. Science can elucidate the causes and consequences of these changes in biodiversity, but ultimately deciding what is good or bad is a moral and social issue (2004, p. 535).

This is a quality point – how far should science and scientists go in determining what species are deserving of life and which are not? Why do humans develop such a sentimental bond with certain creatures, and abject hatred for others? Invasions and extinctions have been happening for millions and millions of years, and Brown and Sax argue that it is irresponsible for scientists to get caught up in subjective reasoning and rather focus on being objective observers to the current large-scale, unintentional experiment on biodiversity - gaining insight into evolution and ecological processes (2004, p. 530). Nature, given enough time, has always managed to sort itself out. There is a pervasive attitude that both scientists and lay-people have about conservation and restoration, being that a return to a natural state is desirable and we must be the ones who dictate what the "natural state" is, along with what aspects of it are favorable. But some fail to realize that this "natural" state is usually not natural at all. At some point in time, everything was transported to where it is now. Where should the line be drawn?

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# A Proposal for Effecting Substantial Road Improvements in Hawaiian Acres

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There is no question that many of the roads in Hawaiian Acres are in deplorable and worsening condition. Unpaved and riddled with nearly-impassable puddles, they suffer from erosion, lack of drainage, widespread neglect, and inadequate planning. Aside from detracting from the neighborhood's appeal, roads in poor condition often present physical problems as well. According to the American Association of State Highway and Transportation Officials (AASHTO), deteriorating roads take a toll on vehicle health and performance, increase fuel consumption, and ultimately result in greater expense for road users (5). Although this report refers to the detriments of deteriorating paved roads, it would seem that the same principles would be applicable to unpaved roads as well, and the damage afforded by the latter probably exceeds that of the former. Rough roads can extend travel time and make for an uncomfortable ride, and the pond-like potholes of Hawaiian Acres' roads not only undermine the integrity of the roads, but can make it difficult for small cars to safely use them. The poor quality of these roads can lead to costly automotive repairs, and many are reluctant to travel on them for this reason. For some, this reluctance has served to create an atmosphere of isolation, negatively impacting relationships, families and quality of life. Hawaiian Acres' sole monetary source for road repairs is donations, and this has been largely insufficient. In order to improve the area and the lives of its residents in general, road fees should be made compulsory for Hawaiian Acres residents.

While the roads of Hawaiian Acres display most of the problems common to poorly-maintained rural roads, the most aggravating problems are doubtless the potholes and the general hostility of the driving surface. According to the authors of Gravel Road Maintenance Manual: A Guide for Landowners on Camp and Other Gravel Roads, the two primary reasons for these problems are improper drainage (8) and absence of erosion control (15). The lack of ditches allows water to sit in the road, and the lack of erosion-control allows rainfall above the Acres to cascade down the slope of the mountain, strip the unprotected roads of soil and substrates, and leave the most affected segments mere stretches of uneven rock. Although these factors are responsible for inducing the present difficulties, much of the blame belongs to those who developed the roads in the beginning. The Hawaiian Acres Planning Committee states that although the Hawai'i County Planning and Traffic Commission urged the subdivision's original developer to improve the roads with a drainage system to permit ease of access, the developer took no apparent action on the roads' behalf (14). This meant, according to the Committee, that the ensuing occupants became responsible for the roads until they could upgrade them to County standards and, because of the residents' inability to improve them with their own insufficient resources; they established the Hawaiian Acres Community Association (HACA) to deal with the problem (14). While HACA has acknowledged the issues surrounding the roads and done much to remedy them, it has so far been unable to instate a solution that would fix the roads within a reasonable time frame. Its first, and arguably most successful, attempt so far has been the use of voluntary membership dues and donations, which are now collected by the Hawaiian Acres Road Corporation (HARC), an off-shoot of HACA responsible for road management. Because the dues are voluntary, improvements are slow in nature and encumbered by restricted funds. This fact says HARC president Patrice McDonald has forced the Corporation to limit its maintenance to the main access roads and only provide small matching donations for the roads on which the bulk of residences are located (11). So, while the vertical lettered roads are in relatively decent condition, many of the more populated roads are in disrepair.

HACA's second attempt to fix the problem has been petitioning the County for help. Although County assistance has been limited due to the previously-mentioned reason, according to the Puna Regional Circulation Plan: Final Report, it did pave Road 8 as a part of the Puna Emergency Access Road (7). This measure has certainly facilitated better access, despite some drawbacks which will be addressed later, and it seems the County could soon become involved again. According to a West Hawai'i Today reporter, a bill was submitted earlier this year by Puna District County Representative Faye Hanohano entitling the County to use fuel tax funds for subdivision road improvement (Lauer). While the bill may very well resolve the road problems, should it pass, there is no guarantee that it will be approved and that the subdivisions will receive aid in sufficient quantities any time soon. If it fails, the subdivisions will be back to square one as far as County aid is concerned, and another solution may be more prudent, whether the bill succeeds or not.

HACA's third attempt involved trying to legalize Mandatory Road Fees (MRF's). In 1985 and 1993, according to the Hawaiian Acres Planning Committee, the Association appealed to the Court to grant them the ability to collect MRF's, but its case was refused on both occasions due to technicalities, despite other subdivisions' success in the same pursuit (14). While it is true that HACA failed to legalize mandatory road fees on both tries, the last attempt was 18 years ago, and in light of the fact that more people have moved to the Acres in recent years, it is likely that enough residents could be in favor of MRF's to pursue them again. It is also possible that HARC might be successful where HACA was not, since HARC is a corporation rather

than a community association and its request might be considered differently. One has only to drive through any of the other Puna subdivisions to see the positive effects of MRF's. Patrice asserts that Hawaiian Acres is the only subdivision without MRF's (11), and its roads are in arguably worse condition than those of the other subdivisions. Because Hawaiian Acres relies solely on insufficient donations and cannot make significant progress on repairing and developing its roadways, HARC should make its own attempt to legalize Mandatory Road Fees, since, in the event of success, MRF's would enable road improvements capable of providing a variety of benefits for residents.

In order for this solution to be enacted, HARC would need to rally a group of citizens willing to pursue MRF's in court, and they would do well to study the exact methods by which the other subdivisions eventually attained legal approval. Fern Acres' attempts at this solution are a good example of persevering through initial defeat. When Hawaiian Paradise Park legally gained the right to require MRF's, the Fern Acres Community Association (FACA) opted to do the same and, according to FACA board member Patti Pinto, though its first attempt was shot down in the local court in 1984, the Association was persistent and gained the State Supreme Court's approval 3 years later ("A Brief History"). If HARC and Hawaiian Acres' residents are willing to take the extra measures demanded by the court that rejected their request, they may very well achieve their goal with another try.

While the overall solution would be to obtain MRF's, reforming the manner in which the resulting revenues are applied to the roads is worthy of consideration. Aside from the need to obtain greater quantities of road funds, the largest issue is the lack of foresight displayed by both the original developers and by those who currently make improvements. I have seen people cover pothole-infested streets with a thick layer of gravel, only to have it washed entirely away on one day of intense rainfall. What HARC and anyone else who makes such attempts ought to do—rather than merely bandaging the problem in the short term—is to redesign the afflicted section, provide it with an effective system of drainage, devise a means to counter erosion, then—and only then—spend money on resurfacing. It is unfortunate to see such resources being literally swept away by such an unwillingness to plan for the long-term and to make note of previous failures of the same kind, and even if there is only enough money to perform the preliminary repairs, a redesigned road will doubtless resist further deterioration much better than would a resurfaced, but not redesigned, road.

This solution should be pursued because it could offer numerous benefits. To begin, there would be more revenue for road repair and maintenance, and the numbered roads could be improved along with the lettered roads. Increased access and ease of roadway navigation would be beneficial to those with small vehicles that have difficulty making it through puddles and avoiding protruding rocks that scrape or dent their vehicles' undersides. Furthermore, non-residents who are unwilling to brave the roads for fear of car damage or an unpleasant experience might be willing to use the roads if their disagreeable features were eradicated. Many people have refused to drive the road; a properly-maintained road would encourage better business, family relations, and socialization in general. Better roads could also increase property value and appeal. The conductors of a 2010 study on the correlation between infrastructure improvements and property values say they "[found] that street pavement increased housing values by 21-25% according to homeowners, and 14-15% according to professional appraisals" (1). While this data refers specifically to pavement, I do not think it unreasonable that other types of road improvements short of full-blown paving could provide similar, though lesser, results. It is possible that increased value could go hand-in-hand with increased appeal, and these factors could make it easier for people to sell their property and could result in an influx of more families who could add to the community.

In a similar way, improved roads could strengthen the community and decrease the presiding isolationism if the roads were actually traversable on foot. In a report sponsored by AASHTO, David Forkenbrock, Director of the Public Policy Center at the University of Iowa, and Glen Weisbod, President of the Economic Development Research Group, suggest that a sense of community may be derived from socialization among neighbors at gatherings and in encounters on neighborhood roads, and that this interaction can contribute to a sense of safety in a community (3). I have personally found this information to be true. Over the past six years, on multiple different days and at an assortment of times, I have only ever seen nine separate individuals use the first three miles of Road 7 for exercising or dog-walking; yet, when I have ventured just a mile further, I have witnessed several groups of people using the road for recreation at the same time on the same day. Why is it that a single mile of the road should be used more than the other three combined? While the occurrence could be attributed to a variety of factors, I believe it really boils down to road conditions. While the one mile has only one medium-sized puddle, the three miles have over fifteen puddles of equal or greater size; while the one mile is easily 1/4 gravel and 3/4 relatively-even terrain, the three miles sport treacherous footing and only three brief stretches of gravel. The one mile segment is obviously more pleasant for exercise because of its favorable conditions, and the volume of people using it on a regular basis would seem to indicate such. The presence of such a number of residents out and about not only fosters socialization in an otherwise extremely isolated place, but also increases the sense that, should something go wrong, there would be people around to help. Despite its community watch program, Hawaiian Acres is by no means the ideal of safe neighborhoods, and even I will admit that I have been uneasy running on some of the less-inhabited roads

where people sometimes walk groups of unrestrained dogs. I believe that improved roads would be effective in countering such uneasiness because more people would be out on the roads and contributing to general security.

Many residents of Hawaiian Acres feel that the unique privacy offered by the rugged roads should be protected, that the best solution would be to perform very minor maintenance or leave the roads as-is, and that the people in favor of drastic road modification should live elsewhere or in a more developed neighborhood. While I agree that general privacy should be upheld, the method by which such a thing is accomplished should not include limiting access or allowing limited access to prevail for the sake of keeping people out at the cost of the consequences listed above. People in the Acres value the neighborhood's general quietude, its low traffic volumes, and its closeness to nature, and would not like to see the entire road network become another Road 8, which is plagued with unwelcome traffic, noise, and inordinate speeding because of its pavement. I am not proposing that the roads be converted into public thoroughfares, but merely that they are developed to the point where the benefits I've described could materialize. As to the problem of a potential increase in speeding, if the roads are improved, yet nonetheless still unpaved, then a vehicle's speed will be limited by the amount of discomfort the driver and the passengers are willing to endure, and I highly doubt this speed would exceed 25 MPH, which already seems high where tolerance is concerned. Alternatively, some may be of the opinion that in order for the fullest benefits to be derived, the roads should not only be improved, but paved. They would say, and rightly so, that, although more expensive than gravel or dirt roads, paved roads require less long-term upkeep, are easier on cars and provide a more bearable ride, permit biking, and cut down more profoundly on travel time. The problem here is in some ways opposite, yet still similar to, the problem with the previous solution, in that both solutions represent the extremes of the solution spectrum and, as with most extremes, the negative aspects quite often stifle the overall benefits. The predominant problem with paving the roads would be a rise in speeding, in noise, in accidents, and, ultimately, a decline in privacy and a possible rise in crime as the neighborhood might become too accessible. So, although paving does have its benefits, such a measure could take a negative toll on the neighborhood's rural features, and I would suggest a more moderate approach.

Some may argue that the best and most immediate plan would be for residents to pay out of pocket for improvements on their respective roads, as those inhabiting the better roads already have. This would, in reality, be the most time-efficient method, if the majority of residents possessed both the funds and willingness to invest them. If these necessary components were already present, then wide-spread road maintenance would have already been achieved, and I do not count on the components' appearance now or ever. One inhibitor of resident-sponsored road-repair is simply the fact that a notable percentage of lots are remotely owned or underdeveloped, and that the owners of these are naturally disinclined to contribute. Residents' fixing of their own roads can work, but only under restricted circumstances. Mandatory road fees would, on the other hand, be regular in occurrence and availability. If every homeowner in the neighborhood were required to pay annual dues, the fees would certainly provide more funds for road maintenance than would waiting for residents to take the initiative, and would therefore be a more reliable and practical solution.

While all past attempts have ultimately failed where neighborhood-wide road-restoration was the goal, the pending fate of the fuel-tax bill promising to provide public funding for private roads must be given further attention. Because all people who purchase fuel already pay a tax that goes towards road upkeep, it would make sense that it be applied to all roads, not just public ones. While this is certainly the most painless option on the part of residents, the bill itself is highly simple, and its possible consequences have not been properly addressed. For instance, will the County and its influence be attached to whatever funds it offers the subdivisions? Will it assume ownership of private roads and impose its own agendas? These questions have not been conclusively answered and, though the bill may indeed constitute the best solution in the event of its actual approval, its implications may render it less ideal than it presently seems.

Regardless of whether or not the bill is enacted, something must be done for the roads beyond the minor maintenance afforded them from what amounts to donations. Each successive year brings with it another rainy season, and each rainy season resumes the work of the rainy seasons before it by continuing to wash away the roads. Because the funds allotted to the roads are only enough for resurfacing and not for complete reconstruction of the roads and integration of drainage systems, the improvements that are made are futile. Mandatory Road Fees have increased the quality and attractiveness of numerous subdivisions already and, if the Hawaiian Acres Road Corporation and the residents of Hawaiian Acres are willing to make another effort, life in the Acres could be significantly improved by the positive benefits such an action would produce.

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# Playing the Odds Against the Solid Men of Boston: The Gamble of Russian America The Effects of Supply Insecurity on Russian America

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Image from http://russiatrek.org/blog/history/key-facts-about-the-sale-of-alaska/

**Introduction**

1802 was a bad year for the Russian-American Company (RAC). It was barely in its third year as a state-sponsored monopoly to hunt the valuable fur grounds in what is now the state of Alaska. The colonial capital, Sitka, had been overrun by angry, alcohol-fueled Kolosh natives, today known as the Tlingit, who had access to superior firearms thanks to visiting American traders and desired to kick the strange foreigners out of their territory. The Kolosh had stormed the fort, overrun the garrison left by the governor while he was away exploring new areas for settlement, plundered the storehouses, and set fire to various buildings. The governor of Russian America, Alexander Baranov, fumed over this disaster in the Russian settlement in Three Saints Bay, on Kodiak Island, several hundred miles away from the recently taken fort. He plotted a desperate attempt to retake the fort—around six hundred men, a mix of Russian and their Aleutian native allies, would travel the open seas in several hundred bidarkas¸ a small boat resembling a canoe, and retake the fort.

The Russian-Aleut force travelled the distance in the North Pacific and landed at Sitka, but was unable at first to retake the fort, which was armed with several small cannons—enough to keep the Russian force at bay. Then, amazingly, the Russian Naval ship the Neva, undergoing the first Russian round-the-world voyage, paid a port call to what they thought was the Russian-American capital. The Neva possessed a compliment of large cannons which were used to shell the fort, and drive the outmatched Kolosh away. This arrival was both fortuitous and seemingly impossible; Russia had a weak presence in the Pacific and a small navy, and most of the ships in service in Russian America were barely-seaworthy cargo ships. In fact, during the years of 1800-1805, not one RAC ship passed by Sitka, and only two Russian naval ships called on the port, the first of which was the Neva[1]. However, many American ships called on Russian American ports during this time, some aiding the Russians by bringing supplies and transporting furs to market in China; other American merchants acting against Russian wishes by trading alcohol and firearms to the Native people of Alaska for furs. While ships of other nationalities operated in Russian America, after 1800 the Americans from Boston, known as "Boston Men" or "Bostonians," made up the overwhelming majority of visiting foreigners, and as such deserve attention in any narrative of Russian America. While the Russians did not favor foreign intrusions into their internationally recognized colonial territory, it was permitted, even at times encouraged, because in the end the Russians could not control it.

This incident is a microcosm of the Russian American colonial experience. While the Russians were the first Europeans to 'discover' the areas they eventually colonized in the North Pacific, they did not have exclusive control over their vast colonial empire. Russian-America outposts were often small and impermanent, dwarfed by the large distances between them. During the period of Russian American colonization the Tsarist government underwent numerous European wars, servile insurrections, several invasions, and was just beginning to realize the extent and promise of its Siberian territory, and was not very concerned with mapping or trying to colonize its claimed American holdings. Russian America truly represented the definition of frontier, in that it was beyond the boundary of control.

How strong was the Russian hold on Russian-America? At no point were there more than eight hundred and twenty three Russians in all of Russian-America[2]. Russian-America is roughly comparable to the Spanish territories stretching from Mexico to Peru, or the English territory on the Atlantic seaboard on the eve of revolution in 1776. The small number of Russians over such a vast territory meant that defense was problematic at best. The sheer distance of Russian America from the seat of the Tsarist government in St. Petersburg was to play the biggest part in the colonization of Russian America, the source of woes for the RAC, and eventually one of the deciding factors of the sale of Russian America to the United States of America in October of 1867. This inability of the RAC to supply its bases in Alaska forced it to extend further into the frontier in search of land suitable for farming and to burden the Russian navy with the task of supply, the failure of which led to the company's continued reliance on frontier American traders, and, ultimately the sale of Russian America.

Geoffrey Blaine in The Tyranny of Distance had this to say about the power of distance:

> It may be that distance and transport are revealing mirrors through which to see the rise of a satellite land in the new world, because they keep that land's vital relationship with the old world in the forefront. In contrast many studies of a new land which ignore that relationship unwittingly isolate the land from the outside world which suckled and shaped it.[3]

It is this distance that heavily influenced the view and treatment of Russian America by the Imperial government, and the problem of supply and distance haunted the Russian colonial enterprise. Whether conscious of it or not, these frontier traders were de-facto instruments of their countries colonial policies, and despite Russian protestations of American interferences in Russian America these very interferences were necessary to the supply of the colony, at the cost of Russian sovereignty.

The small influence of Russia on Alaska can still be seen on the names of geographic features and towns, in the practice of the Russian Orthodox faith among many of the Native groups that were exposed to heavy Russian contact, and in the surnames of many Alaska residents. However, this influence pales in comparison to the American presence in Alaska, and like Russian America itself, is relegated to a historical curiosity except in a few places of what truly was "The Last Frontier."[4]

Foundation of the Russian-American Company

Although the Russians were established on the western Pacific coast by the mid-seventeenth century, it took almost seventy more years before they ventured further eastward. The impetus for this next round of exploration came from Tsar Peter I, otherwise known as Peter the Great. While spending time in Amsterdam in 1697, Peter came under the influence of Nicholas Witsen, a Dutch scholar who believed there was a "close connection between Kamchatka and America by way of a large island or American peninsula."[5] Shortly before his death in 1725, Peter selected the Danish mariner Vitus Bering to head an expedition under instructions to make his way to Kamchatka and from there to sail "along the land which goes to the north, and according to expectations (because its end is not known) that appears to be part of America."[6] This first expedition was technically not a success, as Bering did not see the American coast, but it did clear up many misunderstandings about the Siberian coast. Bering was tapped again to lead what came to be known as the Great Northern expedition of 1738-1742. This time he found the American coast, and while the mission brought back conflicting and confusing geographic information, it made an undeniable impression on many in Russia of the superior quality of the fur samples collected in the Aleutian Islands.

Beginning in 1743 successive expeditions of Russian fur trappers voyaged to the Eastern (Aleutian) Islands. Many of the promyshlenniki recruited in Siberia "were often uneducated, unskilled, and undesirable, inept and drunken laborers," the dregs of Siberian society.[7] This societal makeup, combined with the crude conditions in Russian America led an anonymous deacon to comment that, "It is better to go into the army than go to [Russian] America."[8] Time did not improve the problem; Michael Tebenkov, a manager for the RAC, quipped in 1852 that "A good worker not only will not go to the colonies but a good man can get there only accidentally."[9] While in Siberia the promyshlenniki conducted much of the trapping themselves as they were unskilled at maritime hunting and in Russian American they virtually enslaved the Aleuts to provide furs for them.[10] The RAC completely depended on the Aleut that a later company official remarked in 1820 that:

> If the company should somehow loose the Aleuts, then it will completely forfeit the hunting of sea animals, because not one Russian knows how to hunt the animals, and none of our settlers has learned how in all the time that the company has had its possessions here.[11]

Conditions did not notably improve until state control over the Russian-American Company was enacted in 1819, and they were particularly bad in the first fifty years of contact. During this first, or boom, phase between 1743 and 1797, forty-two independent Russian companies made 101 voyages along the Aleutians and obtained pelts worth around eight million rubles.[12] These were often short-term companies, put together by a group of merchants and staffed with Siberian promyshlenniki. The large number of companies in this early phase reflects the amateur ambition of these pioneering Russians; over time many of the companies went bankrupt or merged, as the voyage was perilous, due both to the unpredictable weather of the Bering Sea, and the general lack of geographic knowledge of the area. By the mid 1790's, only the Shelikhov-Golikov Company was left, and the owners petitioned for an official charter by the Imperial government granting them a twenty-year monopoly on the fur trade. On July 8, 1799, Emperor Paul I granted this charter to the Shelikhov-Golikov Company which reorganized as the Rossiisko-Amerikanskaia Kompaniia, or RAC, and was now responsible for Russian settlement and the exploitation of Native peoples and furs in Russian America.[13]

Early History of the Russian America Company and the Problems of Supply

Russian America was now entering a new era. Gone were the days of sailing to America to ply the rich coastline for furs; with the official monopoly on the American fur trade came the need for colonization. The RAC found itself tasked with the responsibility to establish and maintain permanent settlements, provide for the promyshlenniki and other Russian officials,

expand operations and colonize unclaimed territory, and secure existing and future holdings in America.[14]

Perhaps the most daunting of these responsibilities was the expansion and security of RAC possessions. Nevertheless, the Russian officials were highly motivated to accomplish this task with very limited resources at their disposal. The head of the RAC during the first charter (1799-1818) was the cunning and able Aleksandr A. Baranov, Chief Manager of Russia's American colonies.[15] Already a veteran of the American fur trade, Baranov summed up his hopes and those of RAC officials: "In spite of our inadequate number of personnel, and the circumstances of the Company, it is our decision to establish the first settlement, familiarize ourselves with existing conditions, and in time expect important results."[16] Looking to expand East and South to counter British and Spanish colonization of the Pacific, as well as to establish an ice-free harbor, Baranov drew on information gained from earlier punitive Russian expeditions and voyages by Cook and Vancouver and decided to establish a settlement on Sitka Island (later re-named Baranov Island) in the fall of 1799. To this end Baranov sailed from Three Saints Bay with "several hundred baidarkas [kayak] and one Russian ship, a force of one hundred Russians, seven hundred Aleuts, and three hundred Koniags [the native people of Kodiak Island, today called Kodiak islanders]" over one thousand miles to Sitka in deplorable weather.[17] Baranov negotiated with the local Kolosh (Tlingit) to build a settlement on the island of Norvo-Archangelisk (New Archangel) later renamed Sitka.[18]

It is notable that the Russians chose to bring their Aleut and Koniag hunters with them for this voyage; they would even bring the Native hunters employed by the company to the far-off establishments in Hawai'i and California. The Russians found it relatively easy to subdue the Aleut and Koniag, who lived in scattered settlements and practiced a subsistence lifestyle in the remote and barren landscapes of the Aleutian chain and Kodiak archipelago. Drawing almost all of their food and building material out of the rich seas around these islands, the Aleut and Koniag were masters of sea hunting, learning from a very early age how to navigate the rough seas in their baidarkas. The Kolosh by comparison lived in the rich temperate rainforests of what is now the Alaskan Panhandle, and as a result had evolved into a highly stratified society. The Russians tried, and failed, to subdue the Kolosh and tension between the two groups soured relations for the remainder of Russian settlement of Sitka, with the Russians constantly afraid of Kolosh attack. The Kolosh exploited this situation to their advantage, establishing settlements near the Russian American capital and forcing the poorly supplied Russians to trade for goods at unfavorable rates. The settlement was also threatened in its infancy by the Kolosh. Kyrill T. Khlebnikov, a prikashchik (agent) writing a report of early Russian America in the 1820's, described the early relations with the Kolosh:

> The Kolosh initially treated us with indifference, but when they realized that we were building a substantial permanent settlement, which they had not expected, they armed themselves with spears and tried several times to seize it from us. They were unsuccessful, however, due to Baranov's vigilance and caution. On April 20, 1800, Baranov left to sail to Kodiak on a galley…The garrison was careless, and the Kolosh attacked and destroyed the settlement in 1802.[19]

The Russians were able to retake the fort, mainly due to the timely arrival of the Neva and its shelling of the Kolosh living in the ruined fort. During the first charter of the company (1799-1819) ships from Russia were relatively rare; on average one ship from either Okhotsk or St. Petersburg arrived yearly, although some years saw no Russian ships. The wants and needs of settlers in Russian America forced the Russians to attempt to build a supply line that stretched halfway around the world. This supply line, possibly the longest in the world at this time, was inefficient and dangerous, forcing the RAC to rely increasingly on foreign, mainly American, traders and shippers.

The Russian-American Company during the first charter period used three methods of supply. They were: directly from Russia via an overland route through Siberia, organic (local foodstuffs), and trade with foreigners. Each had its benefits and detractions. The promyshlenniki all came from Russia and demanded "tame," or "Russian," supplies when they could be procured—grain, beef, butter, common garden vegetables, tree fruits, sugar, and tea.[20] The Aleut and Koniag who worked for the company, as well as the Creole class that was the product of promyshlenniki—Native liaisons, had also adapted to the aforementioned Russian goods.[21] Nevertheless, Russian supplies were in high demand in the colonies and the Russian officials during the first charter expended a massive effort in attempting to secure them overland via Siberia.

The overland supply route through the vastness of Siberia was crude, time-consuming, and the distance of over 4,000 miles from St. Petersburg to Okhotsk meant that the majority of goods transported spoiled along the way. Many of the non-perishable goods such as shipbuilding materials were produced in the industrial areas of western Russia while food items such as wheat and butter were procured as close to eastern Siberia as possible. Having to use horses as pack animals due to the rugged terrain and a lack of sizeable rivers for navigation, the RAC depended on native Siberian herders to act as transporters and guides. This route was perilous for several reasons: horses often perished due to the grueling terrain, Siberian exiles often raided the caravans, the distance between settlements at times forced the caravan to forage from the wilderness, and the route crossed more than 1,000 rivers and streams that had to be forded.[22]

Leaving Irkutsk in the spring the shipments arrived in Okhotsk in the middle of the summer and reached their final destination of Sitka by October, and, due to exposure to the harsh Siberian summer, shipments were often spoiled by the time they arrived in Okhotsk. The cost was high as well—the price of flour shipped from Irkutsk to Okhotsk increased by six hundred percent.[23] Grain shipments, a staple of the Russian diet, were often so rancid by the time they reached Okhotsk that Kamchatka received most of its useable grain from visiting American traders.[24] Okhotsk, the main harbor in Eastern Siberia during the time of the first company charter, suffered from strong winds, shifting sandbars, and was shallow. For all these reasons landing at Okhotsk was detrimental to the large Russian transport ships that plied the North Pacific. The Russian ships and the Russians who sailed them were both poor quality; ships built in Russian American and Siberia suffered from a lack of experienced shipwrights, and Okhotsk itself had low quality timber for shipbuilding. The average life of a Russian built ship in the colonies was 3-5 years, and their fate was often shipwreck—in 1819, eighteen company vessels were shipwrecked in the colonies alone, which Russian officials attributed to a lack of training and the poor quality of sailors.[25] According to Captain-Lieutenant Frederick Lütke many of the best ships in service in Russian America were purchased from visiting American traders, and Lütke's judgment is echoed by many others, both visiting foreigners and Russians, throughout Russian American history. The poor quality of the goods shipped overland in Siberia, and the hazards of navigation in the North Pacific left Count Mardvinov, Chief Manager of the RAC in 1824, to remark that, "Provisionment of Alaska via Okhotsk was almost the same as no provisionment at all."[26] Realizing the difficulty of supply through Siberia from an early date, attempts were made to create a self-sufficient colony within Alaska but were met with complete failure.

Attempts to organically supply food for Russian America were made from the beginning of permanent establishment in 1784. Working against the Russians was the short growing season in Alaska, as well as the wet, damp weather of the Alaskan coast where the Russians settled. Another factor hurting agriculture in Russian America was the existence of the "Little Ice Age" in the years between 1560 and 1850, with particularly cold years during the last one hundred years of the cooling cycle.[27] This cooling resulted in a shorter, colder, and wetter growing season and these effects were amplified in locations near glaciers, like Sitka. Nevertheless, some crops such as potatoes, carrots, radishes, turnips, and other tubers fared well in Alaska as they could withstand the wet and early frost, although the Russians often complained that they tasted "watery."[28] Ranching in Russian Alaska, except in the interior of Kodiak Island, suffered a similar fate; the hay needed to feed livestock in the winter would often mold during the wet summer and winter seasons. The result was that most of the animals sent to Russian Alaska were slaughtered, although the meat gained from them was marginal as they were often underfed during the long voyage to Russian America.

One constant supply of food for Russian America was the meat gained off of the various animals hunted for the fur trade, mainly fur seals, but also including sea lions, beaver, and otter. The Russians coerced and later employed the vast majority of Aleut and Koniag males to hunt for them, which left few experienced hunters to gather food for the winter. Added to the problems of food supply insecurity was the initial resistance of Aleuts and Koniags to the adoption of European agriculture and that the women and children were often forced to help cure hides instead of prepare food for the winter. During the first charter of the RAC, before it was charged with supplying the Native workers and their families with supplies and time off to subsistence hunt, many natives starved to death.[29] This perilous situation of supply and its effects on both the health and morale of promyshlenniki and Native workers soon began to hurt RAC finances, forcing the colonial government under Alexander Baranov not only to conduct trade with passing foreign ships, but to enter into commercial contracts with them.

American traders became very active in both the rich fur trade of the Pacific Northwest and in supplying the colonial Russian possessions. Between 1787 and 1806, sixty-one of the seventy-two ships that visited Russian America sailed from Boston.[30] The predominance of the Boston Men is explained by several factors. Sailing from Boston they were several thousand miles closer to Russian America than the Russians in St. Petersburg. They spent less time at sea which meant decreased mortality rates aboard ship and increased profits due to a quicker turnaround time to either an American port or Canton, where they would trade Russian furs obtained in Russian America for a tidy profit. The British were pre-occupied with their emerging colonial empires in India, Burma, and the West Indies and had few ships to send on a longer voyage to the Pacific Northwest. While the British were engaged in fur trapping via the Hudson's Bay Company, their activities during the first charter period were confined to the interior of Canada, several thousand miles from Russian America. Politics was also a factor: the Russians in many ways preferred to work with Americans because of their wish to subvert the shipping powerhouse that was Great Britain, and to that end they hoped to form a friendly relationship with America.

As early as 1798, Russia and America were looking to promote the doctrine of "neutral rights" on the seas and, by doing so, weakening England's hold on trans-oceanic shipping.[31] It is telling that the 1799 RAC Charter, in article five, authorized the company to "sail to all nearby nations and enter into trade with all adjacent powers, providing it has their permission and Our Imperial consent."[32] Colonial officials, namely Baranov, used this as permission to enter into trade with visiting foreign merchants, owing to the fact that the Russians could not engage in any trade with other powers in foreign ports

due to its limited number of ships which were in poor condition. American traders took full advantage of this situation; in the two years after the chartering of the RAC, 82,000 rubles (one ruble is equal to one-half of a dollar) worth of goods were bought from visiting Bostonians.[33] Describing the attraction of New Archangel to foreigners, the Russian Captain Yury Lisyansky, commander of the Neva during the aforementioned battle of Sitka, noted that

> The settlement of New Archangel will always be a place of resort for ships trading on the coast; as the Russian company are ready to purchase flour, brandy, woolen cloth, and every necessary, at a profit of at least fifty per cent to the trader; which is more than he would obtain at Canton, besides the chance of his being obliged to sell there at a loss.[34]

Nevertheless, the Imperial government and main administration of the RAC was worried about too much foreign contact in its colonies, for in 1802, during the Napoleonic period, it instructed Baranov to "receive every foreign ship with great caution at all times, because distance prevents us from being able to keep you informed about rapidly changing political situations."[35] While this warning was directed at all foreign ships, the perilous situation of supply in Russian America forced Baranov to depend on visiting American traders. Khlebnikov expressed this need and apprehension later:

> There were obvious advantages in establishing relations with the Americans who after trading along the northwest coast on their homeward voyages, would dispose of their [surplus] goods at moderate prices. This cannot be considered a very great advantage, however, for if the Americans knew that the Company would buy their goods, they would willingly come to Kodiak and even more remote places.[36]

During the first decade of the nineteenth century the Bostonians and RAC decided to engage in a number of efforts to jointly hunt furs off of the coast of California and, separately, agreements were sought to form a consistent base of supply from the newly formed American Fur Company, headed by the Bostonian John Jacob Astor.

One of the Bostonians, Joseph O'Cain, who visited Sitka in 1803, had more on his mind than trade; he wished to join forces with Baranov to hunt the rich fur grounds off the coast of California. Neither the Russians nor Americans had any rights nor jurisdiction in this area, but O'Cain and Baranov sensed correctly that the Spanish would provide little resistance at the northern edge of their New World possessions. The RAC was constantly looking for new fur trapping sites as their large harvests often depleted the area adjacent to Russian settlement within a few years from the start of the hunts.[37] The proposed agreement was mutually beneficial: O'Cain could provide transport on his ship, the Eclipse, and access to markets in Canton but lacked the necessary equipment and hunters, which the RAC had, in abundance. Baranov had another motivation for agreeing to the venture: in 1802 he had received secret instructions to scout and establish Russian settlements as far south as he could manage, to both enrich the company and check English expansion into the North Pacific.[38] It is likely that Baranov saw this venture with O'Cain as an opportunity to use the visiting Bostonian for Russian gain and establish a stronger Russian presence in the North Pacific that could check foreign powers looking to undercut RAC profitability.

On October 26, 1803, O'Cain left Kodiak Island with several Russian promyshlenniki and twenty baidarkas to set sail for California. Although welcomed at first in San Diego, the Spanish soon sent several requests to O'Cain asking him to leave. While Americans were allowed in the waters of Spanish California, the Russians were prohibited and the Spanish could tell by the presence of the Aleut hunters that O'Cain was in league with the RAC. All of these warnings were ignored, the voyage was mutually profitable, and the impotence of the Spanish in preventing foreign activity in the waters off California was revealed to a pleased Baranov who now devoted his attention to this new hunting area.[39] Trade with Bostonians continued on a regular basis for several more years and Baranov even employed Bostonians directly to bring supplies from Spanish California.[40]

American-Russian joint ventures continued for several more years and proved very fruitful for both parties until the War of 1812 interrupted American commerce due to English assault on worldwide American shipping.[41] However, before the war concerns were aired in Russia over the increasing presence of the American traders and the questionable profitability of RAC-American contracts. Russian officials were upset over the predilection of Bostonians to hunt furs in RAC territory, and to trade both weapons and alcohol to the Native Americans there which threatened RAC profitability and security.[42] In 1810 Russian Ambassador Theodore Von Pahlen told the RAC that

> The Government of the United States has neither the desire nor the power to stop this illicit trade. Many individuals who have influence in the East of this nation and who greatly dislike the present administration share in the profits of this trade, and the Government is afraid of annoying those who act against its interests.[43]

In a letter to Baranov, Andrei Iakovlevich Dashkov, the Russian Consul General in Philadelphia, noted the above concerns and added that the English had recently established a fur trade outpost on the Columbia River and that he was instructed by the Tsar to try and establish a commercial contract with the United States.[44] Dashkov

and the RAC hoped to entice the Bostonians with commercial contracts that would both present a united economic bloc to keep the English fur traders out of RAC territory and to control the Bostonian-Native trade that was so detrimental to RAC profitability and security.

The governments in Washington and St. Petersburg supported commercial ties between the RAC and the Bostonians, but for different reasons. The U.S. wanted to conduct trade in the Northwest on a "mutually liberal" basis, wanting free reign to trade with the Russians there and realize profit in the open market.[45] For the Russians, any commercial agreement, aside from the benefit to the supply of Russian America, took on a more international role. An anonymous spokesperson for Tsar Alexander I noted in 1810 that "it is the interest of Russia…to encourage and strengthen and multiply commercial powers which might be the rivals of England, to form a balance to her overbearing power."[46] The ensuing commercial contracts between visiting Bostonians and Baranov were quite fruitful; by 1811 Baranov was able to stockpile three to four years of supplies.[47] Although the RAC possessed enough supplies to continue operations, Baranov wished to establish a permanent contract to not only bring in supplies but to transport furs to Canton. To this end, in May 1812, he entered into a contract with the American Fur Company headed by the Bostonian John Jacob Astor. Prospects for the agreement were high. Dashkov, in a letter to Baranov, stated that this exclusive contract would allow Astor's company to monopolize the American end of the fur trade and extinguish trade with the Natives, establish regular and cheaper supply to Russian America, ensure transport of furs to market at Canton, and squeeze the British out of the fur trade in the Pacific.[48] However, tensions between the English and the United States over impressments of American sailors erupted into the War of 1812 and Astor, fearing British attack, sold his Pacific holdings to the British North West Company.[49] With the cancelling of this contract the unregulated and somewhat unpredictable trade reemerged with foreigners; Bostonians both traded the RAC needed supplies, and resumed trading weapons and alcohol to the Natives. Hoping to end this reliance on foreign merchants the RAC attempted to establish colonies in California and Hawai'i, but these failed due to the lack of consistent supply and experienced personnel, as well as being completely unprofitable.[50] The anger and impatience of RAC officials in St. Petersburg with the colonial experiment and its leader, Alexander Baranov, resulted in moves for his replacement during the debate over whether a second charter to the RAC should be granted by an apprehensive Imperial government.

The Second Charter of the Russian America Company and the Ukase of 1821

Granted in 1799, the first charter of the RAC was issued for twenty years and subject to imperial review after this period. At the beginning of the first charter Russian America consisted of several sparsely populated settlements that stretched as far East as Three Saints Bay on Kodiak Island. By 1817, 450 to 500 promyshlenniki and twenty-six sailors lived in sixteen settlements stretching from the western end of the Aleutian Chain at Adak to Russian America's eastern terminus at New Archangel and Fort Ross in modern day California.[51] Baranov did much to grow the empire, perhaps more than any private citizen, but his health was deteriorating from age and the company sought to replace him with a more able administrator. Because he had been part of the RAC before incorporation and the only governor up to 1817, a "cult of personality" surrounding Baranov had grown and the main administration was looking to break up this cult that at times bucked attempts to impose bureaucratic control from St. Petersburg in Russian America.[52]

To this end the RAC accepted the imperial suggestion that a placement for Baranov be selected from the Imperial Navy, and in 1817 Leontii Andreianovich Hagemeister sailed to New Archangel aboard the Kutuzov, arriving in November of that year.[53] One of Hagemeister's first directives was to place all company employees, including all Aleut and Kaidak hunters, under a universal salary system.[54] One effect of this directive, perhaps unintended, was to increase the reliance of all inhabitants of Russian America on supplies, which came at a high cost from American traders and at an even higher cost from Russia. In addition to the earlier suggestion the RAC reluctantly agreed that the company be administered by the Imperial Navy, effectively bringing the company under direct government control. The biggest change concerned the 'cult of personality'—the company was no longer to be governed by merchants for long periods of time, rather a senior naval officer that would serve a five-year term.[55]

While the debate over the second company charter was progressing in St. Petersburg, the Imperial government received various reports sent to it by new naval officers warning of a large American presence in the colonies. After a lengthy debate the Tsar in September 4, 1821, enacted a Ukase prohibiting all foreign merchant ships from trading with Russian colonies.[56] Act II stipulated that "no foreign vessel may anchor on the coast or islands belonging to Russia...nor may such vessel even approach closer than 100 Italian miles. Any vessel violating this prohibition will be confiscated with its entire cargo."[57] Less than two weeks later, on September 13, 1821, the Tsar issued a personal ukase renewing the charter of the RAC for another twenty years. American merchants vigorously protested the ukase prohibiting trade and pressed Washington to ask the Russians to remove this barrier, mainly basing their argument on the Monroe Doctrine and free trade principles.[58] The RAC was determined to become self-sufficient and be the sole provider of supplies and transport to the colonies. Like the overland route through Siberia, this effort at self-supply turned out to be a great disaster.

By the mid-1810's Bostonian activity made the Siberian route obsolete and the naval administration

decided that to meet supply needs ships would be sent out of Cronstadt, the naval station near St. Petersburg.[59] Ships from Cronstadt would then, on the return trip, carry furs from warehouses in Russian America to Okhotsk where they would travel overland to Kiakhta, as the Russians were still not allowed to conduct trade with the Chinese at Canton. The supplies sent from Cronstadt "rotted, rusted, or broke," cereal grains such as wheat fell prey to rats, and iron goods such as nails fared poorly in the tropical conditions through Indonesia and the South Pacific.[60] Ships were often delayed and the furs for the return trip rotted in the warehouses, and the furs that did not rot in the warehouses often arrived at Kiakhta too late in the trading season, having to then sit for another year, increasing the chance of spoilage.[61] Finally, ships were vulnerable to the complex and changing international political situations in Europe or the dangerous geography along the 13,000 mile route from Cronstadt to New Archangel.[62] The few voyages taken during this time illustrate the high level of cost associated with supply from Cronstadt. The 1819-1822 Kutuzov voyage cost the RAC 700,000 rubles in provisions, salaries and lost furs, while only returning 200,000 rubles in furs sold at market.[63] In 1822 no ship was sent from Cronstadt, and the voyage of the Helena in 1823 further cost the RAC 500,000 rubles.[64]

It should be noted that although transport by sea was expensive, the overland route through Siberia was three times the cost of an average sea transport. Because the Siberian route was so inefficient supply via Cronstadt would remain the RAC-sponsored method of supply for Russian America. Of the sixty-five ships sent to New Archangel from Constadt between 1803 and 1864, two-thirds, or forty-six were for supply.[65] Yet supply through visiting foreign traders was still the cheapest option for the RAC.

The Russo-American Convention of 1824 and the 1839 Hudson's Bay Company Agreement

While trade with foreign powers had been prohibited by the 1821 ukase, this declaration from the Tsar had not stopped colonial officials from taking advantage of visiting Americans, especially when supplies were precariously low. Khlebnikov, in his published reports, states that over one million rubles in trade with foreigners was conducted from 1820-1825.[66] Nevertheless, by early 1824 the St. Petersburg office was petitioning the Imperial government to lift the prohibition on foreign merchants. In a letter to the minister of Finance the main office made the argument in terms of practical economics:

> It is necessary only to imagine that our settlement comprise no more than 2000 people, including 500 Russians, scattered over an area of several thousand miles to realize whether they are strong enough to resist well-capitalized and numerous Americans acting in concert.[67]

Because of the low Russian population in Russian-America and for the sake of profitability, the RAC needed to work with the Americans, not against. It was to this end that the "Russo-American Convention Concerning the Pacific Ocean and Northwest Coast of America" was signed on April 5, 1824.[68] The agreement removed the ban on American merchants for ten years, with the proviso that the Americans would not trade any firearms or alcohol to the Native peoples of Russian America. This agreement removed the need for the RAC to wholly supply itself internally—by 1826 the head office shipped from Cronstadt only what the Americans could not bring.

By 1825, the British were making their presence felt again in Russian territory, and on that year were the same terms as the Americans under the Russo-American Convention. When the ten-year contract expired in 1834, Governor Ferdinand P. Wrangell immediately imposed the former restrictions on visiting Americans in New Archangel. Wrangell's order to cease trade with the Americans was at this time hard to enforce; with few naval ships and an ever-present need for supplies he was forced at times to bend his own prohibition. At this point the U.S. government stepped in on behalf of private commerce and lobbied the Russians to remove this trade barrier; after much debate the Russians relented and reestablished the 1824 agreement subject to yearly review.[69] Although British activity in the North Pacific during the next two decades grew, Americans still dominated the RAC supply: from 1801 to 1841 of the 120 foreign vessels that called on New Archangel, 111 were American.[70] However, around 1834 American fur trade started a gradual decline as Americans refocused on the whaling industry, leaving the British and Russians to manage the fur trade. By 1842 the Americans fielded over two hundred ships in rich whaling grounds of the North Pacific, moving on from furs to exploit this abundant resource.

The British presence on the West coast of America continued to grow, and in 1839 the RAC entered into a ten year agreement with the HBC to lease the RAC 'panhandle' section of Alaska in exchange for a yearly delivery of supplies, such as wheat, flour, salted meat, and butter among others, all at a fixed price.[71] While this agreement ensured regular supply, according to Richard Neunherz it "caused the Russians to surrender one of the richest portions of their holdings for 10 years."[72] Nevertheless supply from the HBC met RAC needs until the latter part of the 1840's. In 1846 England and the United States concluded the Oregon Treaty, resolving a territorial dispute in the Pacific Northwest and depriving the HBC of its most productive farmland, the product of which made up the main grain supply for the RAC.[73] Later in 1848 the California gold rush drained many settlers in the entire Pacific Northwest by the promise of quick riches, further depriving the HBC of settlers on lands it held as agricultural colonies.[74] The RAC-HBC

contract was renewed for another ten years in 1849, but without a clause for yearly supply. Instead, the RAC now relied on supplies from American merchants operating out of California (which became an American territory in 1848) and supplies from Cronstadt.

The RAC charter was renewed again in 1841, and was mostly identical as the 1821 renewal. While most of the financial records perished in a fire in the company archives, Tikhmenev notes that the company was increasing in profitability during the end of the second charter.[75] The main office and Imperial government by this time had uneasily accepted foreign involvement in RAC territory and chose to maximize profits, which required a cheap source of supply and a steady stream of revenue. This last charter period was marked by an impressive diversification of RAC activities; attention was shifted away from the declining fur trade to gold mining, timber harvesting, coal mining, fisheries, whaling, and even the ice trade to California. However, these industries were plagued by the very problems that had dogged the RAC from its inception—a lack of manpower, insufficient supply networks, and vulnerability to international rivalries.

In 1848 gold was discovered in California near the former Russian Fort Ross, much to the dismay of RAC officials, although most conceded that they would have been unable to stop the tide of immigration to the gold fields. Tsar Nicholas I in 1848 declared that "the Russian American Company be informed that it would be useful if it would follow the example of other private persons in mining gold in California."[76] The company was reluctant to engage in mining gold as it had a very limited number of personnel it could spare and it was worried that those sent to mine gold would flee service.[77] It is notable that at this time the majority of the Americans in the North Pacific operated out of fast growing California, not the former capital of American shipping, Boston. Beverly Sanders, a California merchant and president of the American-Russian Trading Company (ARTC), traveled to St. Petersburg in 1848 to propose a twenty year agreement to transport ice, coal, fish, and timber to the new American territories on the West coast in return for supplies needed by the RAC.[78] The RAC accepted this promising agreement for secure supply and the ARTC was able to supply Russian America until its sale in 1867.[79] The RAC also attempted to enter into the whaling industry, which by 1846 the Americans dominated with a fleet of 736 vessels operating in the North Pacific.[80] This RAC set aside 200,000 rubles to form the Finnish-Russian Whaling Company to hunt in the North Pacific, but they were stymied by the low revenue set aside for this project, and trouble operating in the open sea during the Crimean War because of open hostilities with Great Britain.

The Crimean War and Sale of Russian America

The outbreak of tensions in the Crimea due to the English and French desire to check Russian aggression against the Ottoman Empire was a great crisis for the RAC. Suddenly, Russia found itself at war with Great Britain, and Russian America shared a border with the British HBC. Although neither the British nor the French attacked any ports in Russian America the Crimean War did serve to break the commercial agreements between the RAC and HBC, and to draw the Russians closer to their new American allies over their mutual dislike of Great Britain. The Untied States, a growing commercial power, constantly ran afoul of the British who were their main competitor in trans-oceanic shipping. To influential men in the U.S. government the answer to British power was to increase U.S. presence in the Pacific. Many voices within both the Russian and American governments were clamoring for American acquisition of Russian America, including the East-Siberia governor N.N. Murav'ev-Amurskii and General-Admiral Grand Duke Konstantin, brother of Tsar Alexander II and his most trusted advisor.[81] The RAC and ARTC mutual dislike of the British and existing commercial contracts between the two companies spurned talk of a possible sale of Russian America to the U.S. In fact, the RAC had gone one step ahead and had a 'fake' document of sale to the ARTC drawn up in case of English or French attack during the Crimean War. This trickery was done with the thinking that the two powers would not want to force America to enter the war on the side of the Russians.[82]

The RAC was still a profitable enterprise, but the Crimean War had highlighted the weaknesses of the Russian Navy and the Imperial government was dealing with economic chaos and political strife in European Russia resulting from the emancipation of the serfs in 1861. Added to RAC woes was the increasing presence of both the HBC and the Americans in the Pacific, and the Imperial government felt that it was only a matter of time before one of the aforementioned powers forcibly annexed Russian America. With these problems forming a backdrop the RAC had an impetus to sell, and it wished to sell to Russia's greatest ally in the Western Hemisphere, the U.S. Talk of sale was postponed by the American Civil War, but this event drew Russia and America closer as allies. The Russians were pleased to see the English economy disrupted due to the Union blockade of Confederate cotton to England, and threatened to give support to the Union if either England or France recognized the Confederacy. After the war negotiations resumed in earnest, and in October 30, 1867, the territory of Russian America was officially sold to the United States for the sum of $7,200,000. The ceremony took place in old New Archangel, now renamed Sitka, and ushered in the end of over one hundred years of Russian exploration and colonization of the Pacific.

Conclusion

Russia has a unique character as a European power: in terms of its geography it is Eurasian in character, stretching from the Baltic to the North Pacific. Seeking to colonize new lands but lacking a sophisticated navy like

its European rivals, Russia looked eastward, venturing further into Siberia in search of ever richer fur grounds. Eventually this search led the Russians to the Aleutian Islands and mainland America, where profit was realized in the rich fur grounds there. The early pell-mell of independent fur companies dwindled to just one; the Shelikhov-Golikov Company, which was granted an imperial charter in 1799, formally becoming the Russian American Company. Charged with colonization as well as making a profit, the RAC faced a challenge of problems: a low colonial population, harsh and varied climate unsuitable for farming, inefficient and infrequent supply, hostile natives, and interloping American and British traders. Stretched beyond its limits of self-supply, the RAC was forced to rely on the American traders from Boston, known to the Russians as the Bostonians, who plied the North Pacific bartering for furs to trade for Chinese goods in Canton. A growing resentment of Bostonian profits at the expense of the RAC and a desire to secure Russian sovereignty in its American possessions led the imperial government and RAC to attempt to expand settlement to the more suitable climes for agriculture of California and Hawai'i. These efforts were failures in terms of profitability and were eventually abandoned (Fort Elizabeth, Kaua'i) or sold (Fort Ross, California). Despite a three-year prohibition from 1821-1824, American trade with Russian America continued to ebb and flow, and the Russians were more reliant on American trade than on their own supply lines. Russia and America enjoyed a greater international relationship as tensions between Russia and England deteriorated during the Crimean War. This war heightened the insecurity Russia felt over the lack of sovereignty it held over Russian America—while peaceful American contacts were more or less encouraged, it would not take much for a foreign power to drive the Russians out, repeating the situation during the Battle of Sitka in 1802.

Russia decided to sell its American holdings to the United States for several reasons: the growing presence of the U.S. in the Pacific, declining profitability despite RAC efforts to diversify income generating operations, an inability to effectively defend and supply Russian America, and a need to focus on growing internal unrest. Delayed by the American Civil War, the sale of Russian America was enacted on October 30, 1867 at a ceremony in Sitka. The legacy of Russian America is complex: as a colonial power Russia held a weak and unstable hold on its colonies and left few markers of over one hundred years as a colonial power in America. As a commercial empire however, the RAC was a mixed success, but was profitable until the very end, fetching a price of 7.2 million dollars for a large area which the Russians held a dubious sovereignty over. The Russian settlement of the North Pacific is unique in terms of European colonization in the Americas. Mostly neglected and managed by an imperial government half the world away, the few Russian businessmen and colonial officials, with needed help from foreign merchants, managed to control a vast area and make a tidy profit in the last frontier.

**Notes**

[1]From Davydov, Dvukratnoye puteshestvie, I, 195: Materialy, IV, 63. Quoted in Gibson, Imperial Russian in Frontier America, (New York: Oxford University Press, 1976), 13

[2]Stephen Haycox, Alaska: An American Colony, (Seattle: University of Washington Press, 2002), 88.

[3]Geoffrey Blainey, The Tyranny of Distance, (New York, New York: St. Martin's Press, 1968), 37.

[4]Alaska State Motto

[5]Haycox, Alaska: an American Colony, 45.

[6]Raymond H. Fisher, "Finding America," in Barbara Sweetland Smith and Redmond J. Barnett, eds., Russian America: The Forgotten Frontier (Tacoma: Washington State Historical Society, 1990), 17-31.

[7]James Gibson, Imperial Russia in Frontier America, 48.

[8]Army service was a mandatory twenty-five year commitment. From Gibson, Imperial Russia in Frontier America, 47.

[9]Gibson, Imperial Russia in Frontier America, 48.

[10]Perhaps as a justification for the poor conditions and brutality the Russian colonists inflicted on the Aleuts they sought to portray the Aleuts as willing subjects whose unbridled animalistic savagery was being harnessed by the Russians for the mutual benefit of both groups. In support of this view is a passage from the diary of Fedor P. Lütke dated September 12, 1818: "The passion of the Aleuts for hunting sea otter transcends any description and can only be compared with the zeal of a cat for catching mice." From The Russian American Colonies, 1798-1867, edited and translated by Basil Dmytryshyn, E.A.P. Crownhard-Vaughan, and Thomas Vaughan, (Oregon Historical Society Press, 1989), 269.

[11]Gibson, Imperial Russia in Frontier America, 8.

[12]Raisa V. Makarova, Russians on the Pacific, 1743-1799, trans. Richard A. Pierce and Alton S. Donnelly (Kingston, Ont.: Limestone Press, 1975), 209-217.

[13]See Appendix A.

[14]The RAC was tasked with providing for the Natives and any Creoles, but they were not considered Russian citizens and thus not granted the rights of Russian citizenship.

[15]This was not Baranov's first service in the fur trade; he had served as Chief Manager for the Shelikhov-Golikov company from 1794.

[16]Kyrill T. Khlebnikov, in Colonial Russian America, Kyrill T. Khlebnikov's Reports, 1817-1832, translated by Basil Dmytryshyn and E.A.P. Crownhart-Vaughan, (Portland: Oregon Historical Society, 1976), 4.

[17]Haycox, Alaska: An American Colony, 97.

[18]While strategically valuable to the RAC the settlement of Sitka was considered to be a crude outpost to both visiting Russian and foreign officials. Sir George Simpson, writing in 1841, had this to say of Sitka: "Of all the dirty and wretched places that I have ever seen, Sitka is pre-eminently the most wretched and most dirty." From Gibson, Imperial Russian in Frontier America, 26.

[19]Khlebnikov, Colonial Russian America, Kyrill T. Khlebnikov's Reports, 1817-1832, 3.

[20]Gibson, Imperial Russia in Frontier America, 48.

[21]It should be noted that although these groups grew accustomed to Russian goods they had much less reservations about subsisting on the organic, or 'colonial supplies.'

[22]Gibson, Imperial Russian in Frontier America, 60-61.

[23]Gibson, Imperial Russia in Frontier America, 57.

[24]Gibson, Imperial Russia in Frontier America, 51.

[25]Gibson, Imperial Russian in Frontier America, 67. This information should be treated as a suspect opinion, given that the officials were attempting to shift blame in reports back to the main office in St. Petersburg. Nevertheless, the high number of shipwrecks must have something to do with the quality of the sailors and the ships, considering that ships of other nationalities did not have such appallingly high rates of shipwreck.

[26]Gibson, Imperial Russia in Frontier America, 72.

[27]G.C. Wiles and P.E. Calkin, Little Ice Age Glaciation in Alaska: A record of recent global climatic change, accessed March 31, 2011. http://www.osti.gov/energycitations/product.biblio.jsp?osti_id=7271655

[28]Gibson, Imperial Russia in Frontier America, 100.

[29]An anonymous account by a Russian Orthodox clergyman described the painful hunger endured by the villagers in winter: they eat the seal bladders in which they store fat and salmon roes, laftaks [the cured hide of a seal, walrus or seal lion, used to cover baidarkas], cord, and other articles made from gut, because they have no shellfish and seaweed when the beaches are covered with ice…[t]hey look more like corpses than living people.

[30]From Richard A. Pierce, ed., The Russian Orthodox Religious Mission in America, 1794-1837, trans. Colin Bearne, 55

[31]Gibson, Imperial Russia in Frontier America, 155.

[32]William Appleman Williams, American-Russian Relations, 1781-1947, (New York: Rinehard & Co., Inc., 1952), 5.

[33]"An Imperial Decree From Emperor Paul I Granting Special Privileges To The Russian American Company For A Period Of Twenty Years," in Dmytryshyn, Basil, E. A. P. Crownhart-Vaughan, and Thomas Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 19.

[34]Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 4.

[35]Gibson, Imperial Russia in Frontier America, 154.

[36]"Secret Instructions From The Main Administration Of The Russian American Company In Irkutsk To Chief Administrator Aleksandr A. Baranov In Alaska," in Dmytryshyn, Basil, E. A. P. Crownhart-Vaughan, and Thomas Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 29.

[37]Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 4.

[38]It was not until the third charter to the company in 1840 that large scale limits were placed on quotas in an attempt to stabilize the rapidly declining population of fur bearing animals. This attempt to shore up the decreasing catches was simply too late to have the effectiveness sought by the RAC and contributed to the efforts to diversify RAC operations into Whaling, Timber, Fishing, and other pursuits during the last charter period.

[38]"Secret Instructions From The Main Administration Of The Russian American Company In Irkutsk To Chief Administrator Aleksandr A. Baranov In Alaska," in Dmytryshyn, Basil, E. A. P. Crownhart-Vaughan, and Thomas Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 27.

[39]Baranov made a second contract in 1806 with the Bostonian Jonathan Winship sailing the O'Cain, and the efforts of this voyage were again satisfactory to both parties. However, Baranov's subsequent dealing with O'Cain was not quite as fruitful. Again in 1806 O'Cain and the Eclipse landed again in Sitkha and proposed to explore trade possibilities in Nagasaki, Canton or ports in eastern India. Finding this proposal agreeable, Baranov loaded O'Cain with pelts and according to Khlebnikov O'Cain failed to exchange them in Canton for an agreeable rate and then shipwrecked on his way back to Sitkha with the Chinese goods, much to the chagrin of Baranov who felt that O'Cain had "duped him." From Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 11.

[40]In the fall of 1809 Baranov concluded a secret agreement with Captain George Eayrs of the Mercury to trade covertly for supplies under the pretense of an otter-hunting contract, and after returning to New Archangel he continued to smuggle supplies to Baranov for several years until captured by the Spanish. From Essig, Ogden, and DuFour, Fort Ross: California Outpost of Russian Alaska, 1812-1841, edited by Richard A. Pierce, 41. Also see Table II in Appendix for a list of RAC-American trades.

[41]See table II in Appendix.

[42]It was weapons supplied by the Boston Men that the Kolosh used to attack New Archangel in 1802.

[43]Gibson, Imperial Russia in Frontier America, 159-160.

[44]"A Letter from Andrei Ia. Dashkov, Russian Consul General in Philadelphia, to Aleksandr A. Baranov," in Dmytryshyn, Basil, E. A. P. Crownhart-Vaughan, and Thomas Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 178.

[45]William Appleman Williams, American-Russian Relations, 1781-1947, 7.

[46]William Appleman Williams, American-Russian Relations, 1781-1947, 8.

[47]Gibson, Imperial Russia in Frontier America, 158.

[48]"A Letter from Andrei Ia. Dashkov, Russian Consul General in Philadelphia, to Aleksandr A. Baranov," in Dmytryshyn, Crownhart-Vaughan, and Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 181.

[49]"A Letter from the Directors of the Russian American Company to Andrei Ia. Dashkov, Russian Consul-General to the United States, Concerning John Jacob Astor, Trade and the Columbia River," in Dmytryshyn,, Crownhart-Vaughan, and Vaughan, ed and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 218-219.

[50]The impetus for the construction of Fort Elizabeth on Kaua'i, Hawai'i was actually not at the bequest of the RAC but rather on a free-agent named Gregory Schaffer who was sent by Baranov to recover the cargo of a RAC ship that shipwrecked off the coast of Kaua'i. For a more through account see Peter Mills, Hawai'i's Russian Adventure.

[51]Gibson, Imperial Russia in Frontier America, 11.

[52]Haycox, Alaska: An American Colony, 116.

[53]Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 15.

[54]This was purportedly done to ensure that workers would have year-round access to food instead of receiving a portion of the hunt which in lean years left many facing starvation. From Gibson, Imperial Russia in Frontier America,

[55]Haycox, Alaska: An American Colony, 116.

[56]"An Imperial Ukaz Prohibiting Foreign Merchant Ships from Trading in the Russian Colonies in the North Pacific," in Dmytryshyn, Crownhart-Vaughan, and Vaughan, eds and trans., The Russian American Colonies, 1798-1867, To Siberia and Russian America, Three Centuries of Russian Eastward Expansion. Vol. 3 of A Documentary Record, 339-352.

[57]See appendix B. The act did contain exemptions for vessels caught in storms, on exploratory missions, or in desperate need of provisions or repairs.

[58]Gibson, Imperial Russian in Frontier America, 22.

[59]Ships were also sent from Fort Ross bearing agricultural goods grown and processed there. However as these goods cost more to produce than to buy from visiting merchants (if available) this attempt at self-supply must be considered a failure.

[60]"When the frigate Cruiser was unloaded and fumigated at New Archangel in 1823, more than 1000 dead rats were found on board." From Gibson, Imperial Russia in Frontier America, 85. Gibson, Imperial Russia in Frontier America, 163.

[61]Gibson, Imperial Russia in Frontier America, 163.

[62]See Appendix C.

[63]Gibson, Imperial Russia in Frontier America, 164.

[64]Gibson, Imperial Russia in Frontier America, 164.

[65]Gibson, Imperial Russia in Frontier America, 76-77.

[66]Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 60.

[67]Gibson, Imperial Russia in Frontier America, 47.

[68]See Appendix D.

[69]Nikolai N. Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, Translated and Edited by Richard A. Pierce, (Kingston, Ontario, Canada: The Limestone Press, 1996), 10-11.

[70]Gibson, Imperial Russia in Frontier America, 168.

[71]Richard Emerson Neunherz, The Purchase of Russian America: Reasons and Reactions, (PhD. Dissertation, University of Washington, 1975), 10.

[72]Richard Emerson Neunherz, The Purchase of Russian America: Reasons and Reactions, 10.

[73]Gibson, Imperial Russia in Frontier America, 207.

[74] Gibson, Imperial Russia in Frontier America, 207.

[75]Tikhmenev, A History of the Russian American Company, translated and edited by Richard A. Pierce and Alton S. Donnelly, 240.

[76]Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, translated and edited by Richard A. Pierce, 36.

[77]Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, translated and edited by Richard A. Pierce, 36

[78]Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, translated and edited by Richard A. Pierce, 65.

[79]Tikhmenev, A History of the Russian-American Company, translated and edited by Richard A. Pierce and Alton S. Donnelly, 328-329.

[80]Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, translated and edited by Richard A. Pierce, 47.

[81]Murav'ev in 1853 stated that "we cannot avoid the expectation that sooner or later we must cede our North American possessions to them [Americans]." From Nikolai N. Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, Translated and Edited by Richard A. Pierce, 85.

[82]Bolkhovitinov, Russian-American Relations and the Sale of Alaska, 1834-1867, translated and edited by Richard A. Pierce, 89

**Table I**

English and American Ships in the Northwest Pacific, 1785-1814 ♦

| | English | American |
|---|---|---|
| 1785-1794 | 35 | 15 |
| 1795-1804 | 9 | 50 |
| 1805-1814 | 3 | 40 |

**Table II**

Fur Trade Contracts With Bostonians 1803-1813 ♦

| Name of Captain | Name of Ship | Year of Contract |
|---|---|---|
| Joseph O'Cain | *Eclipse* | 1803 |
| Jonathan Winship | *O'Cain* | 1806 |
| Jonathan Winship | *O'Cain* | 1809 |
| Nathan Winship | *Albatross* | 1810 |
| William Davis | *Isabella* | 1811 |
| Thomas Meek | *Amethyst* | 1811 |
| William Blanchard | *Katherine* | 1811 |
| Isaac Whittemore | *Charon* | 1813 |

♦ From Gibson, Imperial Russia in Frontier America, 155.

♦ From Khlebnikov, Colonial Russian America: Kyrill T. Khlebnikov's Reports, 1817-1832, 7.

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# You Are What You Buy: Postmodern Consumerism and the Construction of Self

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In our postmodern society, few things play the influential role in our lives consumerism does. Consumption is intimately tied to the creation and production of a sense of self. Few would argue that products are imbued with a greater significance than what their primary function may be. Today, it is virtually impossible to buy any product not embedded with certain symbols of identity acquired by the buyer knowingly or otherwise. Recognizing this, it is possible to draw the conclusion that consumption functions as a way to create a sense of self. However, this is merely the tip of the iceberg. The consumer may assume their consumption pattern sets them apart from the rest of society, marking them as an individual, but this is a fallacy. Consumption is one of our most creative and most restrictive practices. Due to this fact it must be concluded that consumer driven production of self is less to do with "who am I" and more with "who are we" or "with whom do I belong." There is no such thing as individualization no matter what we may think. Rather, consumption functions as way for the consumer to communicate with society at large where they fit within the social structure.

Jean Baudrillard claims that consumerism, or late capitalism, is an extension of his idea of the hyper real. In his way of thinking, everything in our daily world is a simulation of reality. The simulation is completed through the production and consumption of goods. Simon Malpas explains:

> The circulation, purchase, sale, appropriation of differentiated goods and signs/objects today constitute our language, our code, the code by which the entire society communicates and converses. Such is the structure of consumption, its language, by comparison with which individual needs and pleasures are merely speech effects (Malpas 122).

Drawing on semiotics, Baudrillard uses the sign/signifier technique to explain consumption so that what we purchase is not just a product, but also a piece of a "language" that creates a sense of who we are. For Baudrillard, our purchases reflect our innermost desires so that consumption is caught up with our psychological production of self. Postmodern consumers can never be fulfilled because the products they consume are only "sham objects, or characteristic signs of happiness" and do not have any real power to bestow happiness to the possessor (Malapas 122). The empty, unhappy consumers have no choice but to consume more products with the hopes of finding fulfillment. This is the driving force behind the capitalist machine.

Consumers are well aware of the unfulfilling nature of consumerism, but recognize that in our society it is the only possible way to live. This does not mean they take the topic lightly. British pop star Lily Allen is known for her blunt, zeitgeist ridden, no-holds-bar lyrics whether singing about cheating boyfriends or her own grandmother. In her song "The Fear," Allen takes on new ground by expressing an emotion that is common to consumers everywhere. While the majority of the lyrics express the singer's desire to be rich and famous, the chorus explains what compels her:

> I'll look at the sun and I'll look in the mirror
> I'm on the right track, yeah I'm on to a winner.
> I don't know what's right and what's real anymore
> And I don't know how I'm meant to feel anymore
> And when do you think it will all become clear?
> 'Cause I'm being taking over by The Fear. (Allen)

While the lyrics seem simple, they are perhaps the most clear-cut example of Baudrillard's argument. The singer can no longer tell what reality is and is lost within the simulacra. In order to find some sense of self or purpose, she dives head first into more consumerism, only making matters worse. Just as Baudrillard predicted, consumerism is a self-propelling system of which there seems to be no way out. Or as Allen states at the end of the song: "I am a weapon of massive consumption/And it's not my fault, it's how I'm programmed to function" (Allen). It should be noted that "The Fear" articulates a sentiment felt by society at large. It is not only about who the singer wants to be, but who she wants the rest of the world to see her as. The expression of her wants or needs is indicative of the way in which consumerism plays on the notion of individualization through consumption.

Role of consumerism in our lives can be seen in a variety of ways. Frederico Garcia Lorca's poem "Cry to Rome" vilifies consumerism. The poem focuses on the darkness that comes into society by consumerism's self-sustaining nature. He goes into great detail how consumerism has replaced God in society. Instead of aspiring for love and peace, we wish for products. This has not only polluted the environment, but the very nature of humanity. In lines 36-39 Garcia Lorca shows how the system of consumerism does not live up to its promises: "The schoolteachers show the children / marvelous light coming from the mountain; / but what arrives is a junction of sewers / where cholera's nymphs scream in the shadows" (Garcia Lorca lines 36-39). This section could symbolize the promise of fulfillment consumerism is to bring to the masses, or children. However, it only breeds disease. In his last four lines, Garcia Lorca continues with "because we demand our daily bread, / alder in bloom and perennially harvested tenderness, / because we demand that Earth's will be done, / that its fruits be offered to everyone" (Garcia Lorca lines 71-74). This statement clearly expresses the self-sustaining nature of consumerism. No matter how the public suffers, they

will continue to seek solace in consumption, which only begets more suffering and more consumption.

Whether individualization based on consumerism is a blessing or a curse, whether it means the final step to personal freedom or being set adrift from all that is solid, is not the point. The point is that fixity can no longer be assumed; personal relationships and connections to social groups are always contingent; and, individuals must now scan the world to decide with whom or what they wish to identify. Sociologist Michel Maffesoli's concept of "neo-tribalism" inspires this way of looking at consumerism. Neo-tribalism is the result of "a spirit of excess, of shared passions and rituals" as opposed to the characteristically modernist faith in individual agency (Bradford 227). Maffesoli goes on to say that the traditional values of "individualism, instrumental reason, the omnipotence of technique, and the 'everything is economics' no longer arouse the adherence of former times, and no longer function as the founding myths or as goals to be attained" (Bradford 227). Therefore in correspondence to Baudrillard's argument there is no individual, we find Maffesoli's conception of "being togetherness." Consumption has ceased to be about the individual and to now be about the collective.

We mark ourselves as members of a tribe by using a distinctive sense of style. This may be best understood in correspondence with Dick Hebdige's work with subcultures. According to Hebdige, subcultures function within the larger framework of society rather than opposed to it. Members of subcultures use the group's "style" to make a comment on the society around them while simultaneously taking part in society (Hebdige). Examples of this would be Goths, Rastafarians, Punks, and Skinheads. All of these examples are extremes. However, the notion of style signifying a specific group and/or place in society can be applied to every consumer. Fashion styles are described in terms of who the wearer is.

It is not uncommon for designers to remark that they make clothes for a specific type of girl. California Casual, American Classic, Urban Modern, Romantic, and Bohemian are all categories of the average women's style that supposedly say something about a woman's personality and where she falls in the social strata. Descriptions of these styles do not contain only the appearance of the clothing but also a synopsis of the "type of woman" who dresses this way. For example a woman categorized as American Classic is traditional, refined, minimal, ladylike, and in control. While these differentiations do not make up a subculture, they do make a category within the larger framework of consumption stating that women who fall within these categories all have a common link and therefore serve the same function as neo-tribes. Maffesoli points out style "is the postmodern form of the social link - a social link in a dotted outline, shaken by violent chaotic, unforeseen jolts" (Bradford 229). The dotted line is shaken by the fact that while style may represent a sense of unity within the style/tribe it nonetheless is made up of overlapping points of view. It may be best then to see style not as unity but as a "cultural expression of an aesthetic vibration, however harmonious or discordant," invoking a meaningful resonance among disparate, even contradictory, social interests (Bradford 230). "Being togetherness" is the key concept of Maffesoli's argument. With this point of view, consumerism ceases to be the production of individual identity.

Perhaps one of the most liberating forms of consumerism is the concept of making a new "self." The process of consumerism makes it possible for a person to move from one area of society to another independent of circumstances of birth, gender, or race. Advertising offers the image of the transformed self; and consumption offers the means of effecting that transformation (Stromberg). One of the best examples of this relationship can be found in women's magazines. In a way these magazines constitute a sort of meta-advertisement, an advertisement for advertising. Consider this 1985 subscription-soliciting letter for the women's magazine Glamour: "If you'll give me just a few minutes of your time now, I honestly believe that I can help you change almost anything about yourself that you want to...Begin the great and continuing makeover of you" (Stromberg). Not only does Glamour promise to give you hours of idle entertainment; they provide the opportunity to create a new self. The promised opportunities for transformation are made more plausible, more desirable, and more necessary by articles that present various techniques of transformation: every page of the magazine, whether an advertising or an article, offers the reader a possibility of salvation and the means of attaining it. This is most evident in the form of the ever popular makeover.

The concept of the makeover to attain a new place in society is hardly a new one. One of the oldest examples can be found in "Cinderella," whose makeover transformation by the fairy godmother allowed her to become a princess. The difference in postmodernity is that it is not necessary to have magical assistance to accomplish this goal; simply purchasing the correct products will do the same thing. On shows such as TLC's What Not to Wear, experts transform fashion "victims" into a different version of themselves. This is a painful process for the "victim," as the identity created through their individual style is stripped away in favor of the "correct" one by following strict rules. However, by the end of the show, the transformed individual consistently claims that she has found the "real me" (Roberts). The correct style for the makeover candidate is chosen based on which neo-tribe they wish to join. A common phrase by the show's hosts is "this is not the outfit of a ___," which implies that the resulting makeover will not only change the "victim's" appearance, but also their circumstances in life.

Makeovers do not have to be as blatant as What Not to Wear and can be performed by an individual in order to transform themselves into the person they

want to be in society. The graphic novel Gemma Bovery presents multiple examples of the heroine's attempts at transformation for the purpose of reestablishing her social status. From the earliest accounts of Gemma's life, we learn she places attempts at transformation through consumerism at the top of her priorities. The most obvious and numerous examples include interior design. After moving in with her future husband, she wastes no time transforming their home into the type of place it should be, given its location and history. When they later move to France, she decorates their home in the French Rustic style as she desperately tries living the life of an authentic resident of the French countryside. Eventually she changes this, resulting with her affair with a younger man in order to correspond with her emotional needs of starting afresh. Each of Gemma's decorating programs corresponds with how she wishes the world to perceive her. When she and her husband first move to France, she does all her shopping at local shops, wanting to be seen as part of this society – to live as the French do. When at the bakery, Gemma exclaims how wonderful the French way of life is: "I mean, 25 different types of bread! God, the French are incredible! I mean, they just know how to love!" (Simmonds 33). Her enchantment wanes once she starts gaining weight from the amount of croissants she has eaten in her attempts to live a French lifestyle. This does not stop her from mocking other couples from England who have held onto their British lifestyle: "Wizzy brought one of her crappy 'Bundles from Britain'- Marmite, Weetabix, last week's Sunday Times" (Simmonds 43). Here we can see how shared consumer products constitute a social group – the British – within a consumer culture. Gemma's disgust for products of her own homeland illustrates her desire to separate herself from one neo-tribe and into another.

Consumerism is not only an economic system; it is the way our society functions. Products are symbolic and say much more than we may realize. While it is easy to conclude the consumption of products leads us to develop a sense of who we are as a person, it actually does much more than that. Consumerism helps us figure out where we fit within society and provides the means by which to change social circumstances. It is easy to disregard consumerism as shallow and devoid of meaning. Baudrillard's ideas on consumerism lead to a sense of loss, as there is no real identity, and no way of gaining fulfillment. However, if you choose to be a consumer and accept identity and social circumstance is a construction there is a sense of liberation. Consumerism hands us the tools to become whomever we want and lets us make the decision on how the world views us. By acknowledging we are not defined by what we own we can look consumerism in the eye and say "this is what I am because I chose it."

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# Consuming Place: Tourism's Gastronomy Connection

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In the face of fears that the world is succumbing to McDonaldization and cultural homogenization, a new hope is emerging: culinary tourism. A tourist is by definition someone who travels for pleasure, and for most of these tourists part of this pleasure is had by experiencing and enjoying the host culture's food. While this has always been peripherally accepted as a part of the larger tourism model, recent research has identified the culinary tourist as an important demographic in their own right. Despite the success and proliferation of American fast-food chains worldwide, recent trends point to a newfound appreciation of, and a desire to experience, the culinary "Other." This has important and far-reaching implications for regional economic development, as well as in the preservation of local and regional culture. By promoting local cuisines and the cultures that created them, regional tourism markets can bolster their revenues while preserving (and in some cases, reviving) local customs and heritage, catering to the increasing demands and desires of culinary tourists.

Food has always played a major role in the human experience, from procurement to preparation and consumption, and this relationship has changed over time – what was once strictly something needed for survival has become many different things (for some of the world, anyway): art, entertainment, pleasure, a hobby, a cultural artifact, an identity, a celebration, something to be experienced. If television programming is any indication, food is increasingly becoming more prominent (and profitable) in popular culture. This sounds silly to say – of course food has always been prominent in our culture, but recent trends point to the entertainment and pleasure value of food becoming more and more commodified as a response to the public demand. While some regions have long been famed for their gastronomic offerings (France, Italy), tourists in all regions must eat regardless of the region's culinary reputation. Tourists travel to new places for a variety of reasons, and generally included in these reasons is to experience new cultures; however, food is typically a peripheral experience. In recent years the "culinary tourist" has emerged with wide-ranging impacts for local cultures and economies.

Culinary tourism can have many positive impacts on the host region's culture. Tourists who travel to have unique food experiences create a demand for an experience that is authentic, and is different from their own (Van Keekan & Go, 2006, p. 59; Sims, 2009, p. 321). This type of tourist provides motivation for the culture to offer and celebrate cuisine that represents their distinct heritage. In today's globalizing world, many have spoken out to express fears of cultural homogenization and a loss of diversity. While this may be the case in some instances, a counter-trend is definitely rising. Because food can be seen as a cultural artifact (Cook & Crang, 1996, p. 131; Everett & Aitchison, 2008, p. 151), with more exposure to different cultures comes curiosity and a desire to explore the origins of regional cuisine. In this climate, regions are able to assert their unique identity with food as a symbol. By differentiating their food culture as unique and special, globalization almost forces localization to happen, and in this way regions can remain, or become, competitive in the global food tourism market through providing "identity in terms of provision of the 'other' and in terms of self-reference" (Hjalager & Richards, 2002, p. 82).

Locals do not always appreciate tourism, and can see it as a detriment to the cultural heritage that tourists come to investigate. Everett and Aitchison (2008) interviewed locals in the Cornwall region of England regarding their thoughts on tourism in general, and some expressed resentment and fear, blaming tourism for the "environmental and social degradation of the county" (p. 156). They go on to note that these perceptions are changing, and attribute this to the rise in interest in food tourism; in response to consumer demand Cornwall has seen development in food related activities such as festivals, and attractions such as the National Lobster Hatchery, all of which promote both sustainability as well as the preservation of local traditions (p. 157-158). Local opinions are changing with the times as well; now many locals see tourism as "the lifeline and can in fact sustain some of those values they thought were being eroded" (p. 157), "keeping some of their old traditions alive… some of them have been revived" (p. 158). Hjalager & Corigliano (2000) assert that festivals and similar food-centric activities "may contribute to an increased awareness of food products and standards, which in turn might stimulate the 'reinvention' of interesting historical food traditions" (p. 291).

Culinary tourism also has positive economic impacts, especially for rural areas. As these tourists become more adventurous both in their palates and their interest areas, rural areas have an opportunity to capitalize. Promoting food tourism in rural areas helps local famers, producers and small business owners, and helps these rural economies to diversify (Everett & Aitchison, 2008, p. 159). Tourists who venture out into these areas are in search of something authentic and different from what is common for them, and in this way help to foster these types of businesses. Their desire to do so is beneficial and can be seen as sustainable by supporting the local economy - establishments wanting to cater to the demand for local products will source their offerings from local purveyors, which in turn cuts down on food miles (Hall & Wilson, 2008, p. 3) making rural food tourism more environmentally sound. This effect can be amplified by the promotion of "slow tourism" – by staying longer less is consumed overall in terms of resources, and fewer emissions are produced (Hall, 2007, 2011). Tourists who commit to more lengthy stays

in a region are more subject to "culinary systems not one's own" (Long, 2004, p. 131), and by encouraging rural producers to promote themselves in a way that makes them more attractive than just as "stop-off areas for passing tourists" (Alonso & Northcote, 2010, p. 705): longer stays can bolster local economies and reduce economic leakage, while at the same time promoting the area's heritage by inspiring investigation.

Of course there are regions not renowned for their culinary heritage. Canada, Australia and New Zealand face special challenges not found in say China or Spain. Canada is a relatively new country and one with an amalgamation of cultural influences; however, they are making great strides to increase their market share of culinary tourists. Turning what could be seen as a disadvantage, Canada is discovering ways to celebrate and promote its culinary heritage by "branding itself as a nation of immigrants" (Hashimoto & Telfer, 2006, p. 35). Canada's multiculturalism is one avenue in which they can promote culinary tourism; another is beer tourism. In south central Ontario, Canada, the Waterloo-Wellington Ale Trail is a self-guided tour launched in 1998 and includes 6 local craft breweries. The aim of this brewing group is to "increase awareness of the regional brewing industry, increase consumption of the region's premium beers…instilling pride in regional breweries, attracting visitors to the area…developing a network of partners in the related hospitality industry" (Plummer et al., 2004, p. 451-452). This is a prime example of how a region might succeed in culinary tourism through clever marketing and creating demand, providing high quality products, and cooperation between various producers and agencies.

New Zealand and Australia face struggles similar to Canada. Without a rich, long-ranging history, culinary or otherwise, along with the handicap of their tyranny of distance, folks down under have been hard pressed to carve out a place in the culinary tourism market; they have done so by succeeding in a sub-set of food tourism – wine. Australian and New Zealand wines are well known, but their cuisine is not. Both countries aggressively market their wines and have achieved great success (Hjalager & Richards, 2002, p. 199). One strategy for success is to promote various "wine trails" whereby tourists embark on predetermined routes that link wineries, to be undertaken by car or bicycle (Hjalager & Richards, 2002, p. 198). Australia has discovered a new niche that its rare Mediterranean climate can offer – olive tourism (Alonso & Northcote, 2010, p. 696). By combining agriculture and food and tourism, Western Australian olive growers are finding ways to integrate themselves into a new market. This will undoubtedly be beneficial economically, and is only possible through the support of local tourism organizations, governments, and collaboration between the growers themselves (p. 705).

Niche marketing can help boost drooping economies by catering to food tourists' demands, which in most cases is an authentic local experience, though in some instances there can be miscommunication. Research has shown that when host cultures try to recreate Western food in an attempt to cater to Western palates, they fail miserably. A study done in Bali, Indonesia found that Western tourists' desires were not being met – that local operators were catering to a perceived need by offering Westernized foods, and not only was this not what the tourists wanted (they expressed desire to experience local foods), the quality of these Western offerings were dismal (Reynolds, 1993, p. 52-53).

But what is authentic? Is "local" authentic? What is local? The definitions of these terms are sometimes blurry. C.M. Hall asserts that "…the local is regarded as better because it is somehow more 'real' in an increasingly commodified and standardized world of culinary production" (2006, p. 3). Allen and Hinirichs note the difficulties in asserting what the meaning of local is, stating that "the ambiguity about what local means…allows it to be about anything and, at the margin, perhaps very little at all" (cited in Sims, 2009, p. 324). If local is more real, then local, by this definition, must mean more authentic. Sims argues that "'local food'" has the potential to enhance the visitor experience by connecting consumers to the region and its perceived culture and heritage" (2009, p. 321). This is vastly different than world-renowned chef Thomas Keller's (of The French Laundry) claim that "…local to me is anything I can get here by jet…in a few hours…lobsters from Maine…hearts of palm from Hawaii…" (cited in Hall et al., 2003, p. 307). Clearly "local" means many different things geographically to different people. Thomas Keller's version does not support local sustainability, at least not if he is sourcing his products via jet – clearly this business practice exemplifies economic leakage. One thread remains constant though: "local" always implies fresh and high quality in food circles.

Sometimes however, local authenticity is staged. In 1972 Scotland launched a "Taste of Scotland" campaign which constructed a food heritage by associating foods with geographical areas or historical figures which may or may not have any relation at all to the item(s); however, it is interesting to note that this approach was not "considered to be inauthentic" (Hughes, 1995, p. 785-786). Whether or not an aspect of food tourism is intentionally staged, tourist events and activities are all constructed in some way to cater to the tourist. Food tourists seem to put high value on the story food tells, and attribute that to its authenticity. Wang argues that "tourists are not merely searching for authenticity of the Other. They also search for the authenticity of, and between, themselves" (cited in Sims, 2009, p. 325); this indicates a highly subjective and wildly interpretable sense of the authentic, and one of a more existential bent.

Today, the culinary tourist can be as adventurous as they dare, sometimes without ever leaving their neighborhood - or even their living room. 24-hour food

networks and travel channels allow the culinary tourist to be voyeurs into foodways, cuisines and cultures that they may never be able to experience otherwise. The curious food tourist can embark on a journey that will take them from a noodle vendor in Thailand, to a 3-star Michelin restaurant in France, to eating bush meat with local tribes-people in Africa, to the best diners in America – all in one afternoon. Travel and food magazines also promote and exemplify food and cultures of the Other, and most Western cities feature a multitude of ethnic eateries. It is not uncommon for groceries to carry ethnic foods, sometimes devoting whole sections to various cultures, and most larger cities in the West have various markets devoted solely to specific ethnic food stuffs as well. Perhaps the fear of McDonaldization is actually resentment and anger that what Americans are offering (or at least what is being represented globally, i.e. fast food) the culinary world is garbage, while they reap major rewards in the beautiful culinary tapestry being woven across the United States.

Food tourism is an up-and-coming, blossoming niche both in the tourist market and for academic research. Clearly there is a newfound appreciation and demand for high quality food with a legacy, a history, and a story, and many are willing to travel far and wide to experience this. It is their motivations that remain unclear: whether to assert the "self" in relation to, and consuming of, the "Other," or perhaps just to satisfy a curiosity piqued by exposure to new cultures and foods through globalization of place and media, or even still – maybe because it just tastes good. Regardless, regional markets have potential to capitalize on this new fetish commodity, and through careful marketing and planning can bolster the economies of small farmers and other purveyors as well as areas with sagging economies.

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# The Shopaholic, Consumer Culture, and Identity

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Sophie Kinsella's zany novels about shopaholic Becky Bloomwood hit the big screen in the spring of 2009. Unlike typical chick-lit or the run-of-the-mill romantic comedy, Confessions of a Shopaholic does not center itself around a love interest. Instead the protagonist, Rebecca "Becky" Bloomwood, is obsessed with shopping. While this trait may share some metatextuality with heavy hitters such as Sex and the City and Legally Blonde, Confessions of a Shopaholic is as dissimilar to these films as it is similar. Unlike Carrie Bradshaw (Sex and the City), Becky does not have an income large enough to bankroll her love of Manolo Blahniks. Nor does she have the family money of Elle Woods of Legally Blonde fame. Becky is legally broke. The Shopaholic book series takes the facets of chick-lit (sex, work, romance and the unpredictable nature of being an intelligent woman in the modern world) and pushes them out of the way to place the genre's backdrop of light-hearted consumerism front and center. "While sex has been all but denuded of its onetime taboos, candid talk about shopping and debt is a far touchier subject" (Colman). In this sense the series functions as a comical allegory for the last fifteen years when consumerism helped drive the world's economy to new heights. Becky's story stirs up prickly issues about the complex interplay of women, fashion, spending, and identity.

As with any adaptation, departures from the original plot create an intertextuality that shows differences in intention. Variances in plot are understood as a series of selections and amplifications of the original hypotext (in this case the Shopaholic book series) into the hypertext of the film adaptation (Stam). What must be investigated is which of the intertextual signals does the filmic hypertext pick up and which signals are ignored (Stam). The intertextual dialogue between the novels and film includes the relocation the story from London to New York City transforming Becky into an American, and alterations of Becky's love interest Luke, as well as Becky's own career path. The end of the film differs significantly from the books as well. These intertextual changes add up to create an image of women and consumerism that varies from the hypotext's intention.

The Shopaholic book series falls under the metatext of the popular genre of fiction most often referred to as chick-lit. Chick-lit novels tell clever, fast-paced stories about young women's messy journeys of personal and professional growth. The heroines gain self-knowledge and self-acceptance, and are thus empowered to take control of their relationships and professional lives (Butler). The genre's origins have been traced back to Jane Austen's work as well as the feminist awakening novels of the 1970s, thus tracing chick-lit's genealogy as parallel to and part of the trajectory of the female bildungsroman (Butler). Preoccupations of mainstream U.S. feminism have resulted in the development of sub-genres. The Shopaholic series falls under the category of consumerism-lit within the chick-lit genre. Rather than read this expansion as simply more of the same, we might ask why issues such as consumption are popular topics in contemporary women's genre fiction. Moreover, how do adaptations of these texts into cinematic representations express feminism and consumer culture?

The film version of Kinsella's bestselling novels was directed by P.J. Hogan who has been praised for revising the romantic comedy with the unconventional My Best Friend's Wedding (1997) as well as making a film adaptation of a beloved classic piece of literature; Peter Pan (2003). The film is a combination of the first two novels (Confessions of a Shopaholic and Shopaholic Takes Manhattan) and draws additionally from the third novel (Shopaholic Ties the Knot). Not just anyone can play a character as mad-cap as Becky and get away with it. Isla Fisher who, as Rolling Stone put it, is "professionally adorable" was cast to play the lovable consumer-mad Becky ("Confessions"). Fisher is best known for her previous work in Definitely, Maybe (2008) and Wedding Crashers (2005) in which she played wacky, but loveable romantic interests. This casting suggests a paratextual dialogue with the audience of "yes she's crazy, but we love her".

Both the books and the film show the lengths to which Becky will go to cover up her debt as well as the overwhelming urge she feels to shop. Unlike other well known chick-lit / romantic comedy heroines (e.g. Bridget Jones' Diary) Becky doesn't struggle with her weight, smoke or drink excessively. Her career and love life are not her central focus. She has one thing on her mind: bailing out her ship of debt (even as her stiletto habit keeps poking new leaks left and right). "It may seem like a bit of fluff, but it actually expresses a great deal of the ongoing cultural preoccupations and anxieties that have surrounded women and women's association with consumption and shopping," says Professor Rebecca Connor, an associate professor of English at Hunter College in New York who has traced the interaction of women and consumption in literature (Colman). Kinsella tapped into the zeitgeist of consumerism which is what makes the series relatable. Of the series Kinsella had this to say:

> "I don't write books to bang home a message, I write to entertain and if a message comes out as well, then that's really great ... I've had responses from readers who have said, 'You know, this has made me think twice. This has made me change my ways.' So, I think it can help people too" (Murray).

It's hard to miss the message Kinsella is sending. The first book opens with letters inviting people to take out loans

and apply for credit cards which are quickly followed with more letters asking "Why haven't you paid off your loan?" As Becky says in the film adaptation, "They said I was a valued customer. Now they send me hate mail" (Hogan). Perhaps Kinsella put it best "This story is about someone who has too much credit thrust upon her too young, and she goes out and gets loads of lovely shiny things, then she goes bust and has to deal with it" (Colman).

The term shopaholic implies addiction. In fact that seems to be exactly what it is. Retail therapy is often joked about but for shopaholics, also referred to as compulsive buyers, consumerism is used as self-medication (Trussell). Their primary motivation arrives from the psychological benefits derived from the buying process itself rather than from the possession of purchased objects. Shopaholics are more likely to demonstrate compulsivity as a personality trait, have lower self-esteem, and are more prone to fantasy than the average consumer (O'Guinn). A shopaholic will fill their emptiness with objects they do not even need. That void may be from years of emotional or spiritual deprivation: fear that there's never enough, whether it's money, material objects, recognition, or love (Bridgforth). Consequences of compulsive buying include "extreme levels of debt, anxiety and frustration, the subjective sense of loss of control, and domestic dissension" (O'Guinn). Of course the positive feelings accompanying the compulsive buyers' self-medicating retail therapy only lasts until they need their next "fix", According to a Stanford University study, it is estimated that approximately 24 million individuals in the United States alone suffer from compulsive buying (Trussell). Becky Bloomwood exhibits many, if not all, of the symptoms of compulsive buying. This is most acutely expressed in the film version in which Becky succinctly explains her urge to shop, "When I shop, the world gets better, and the world is better, but then it's not, and I need to do it again" (Hogan). The hypertext of the film created an intertextual change to the hypotext with Becky joining Shopaholics Anonymous at the entreaty of her best friend Suze. In the novels Becky does not confront her shopping habit in this way. Presumably this was added to show Becky's addiction more distinctly. It also shows how shopping addictions affect numerous people from various backgrounds.

Notable screenwriter Tim Firth (2005's Kinky Boots and 2003's Calendar Girls) worked with Hogan to translate the novels' first person narration into something more suitable to the silver screen. Firth came up with the concept of the store mannequins talking to Becky rather than having a voice over of her inner thoughts in order to dramatize the temptation that she faces when entering consumer paradise (Murray). The mannequins act as sirens luring Becky to her doom as well as a physical embodiment of Becky's faulty inner voice. Far from being a silly piece of animatronics Hogan's mannequins show the fallacy of the consumer (Colman). When confronted with angry comments of fans, Hogan explains that the mannequins also function as an element of fantasy. Hogan claims the original British title of the first novel, The Secret Dream World of the Shopaholic, was the motivation for incorporating the fantasy element (Murray).

Interestingly the fantasy elements of the novels and film have a basis in real life cases of compulsive buying. An individual with compulsive behaviors is apt to exhibit great capabilities of fantasy. It is believed that compulsive behavior coupled with fantasies of personal success and social acceptance allows individuals to temporarily escape negative feelings. Others feel that the fantasy element of compulsion is important in reinforcing compulsive behaviors by granting people the ability to mentally rehearse anticipated positive outcomes (O'Guinn). While shopping, Becky ascribes meanings to merchandise. To her the designer scarf is not only a scarf it is a way of defining herself and finding happiness. In the film the mannequins coax her into purchasing an expensive green Denny & George scarf. "The point about this scarf," they say, "is that it would become a part of a definition of you. Of your psyche." They insist that she'll be known as "The-Girl-In-The-Green-Scarf", a girl with confidence and poise (Hogan). Thus, the merchandise is not only about fashion, it is about claiming an identity.

In this way Becky's sense of self, as she receives it from the mannequins, comes implicitly from the conception of femininity created by capitalistic driven consumer systems (Muller). Psychoanalyst Jacques Lacan's theory of the development of the concept of self theorizes that the mirror stage represents the moment when the subject associates itself to an order outside of itself to which it will refer from then on (Muller). Using Lacan's conceptual mirror alongside Marxist terms, society, carrying its ideological imperatives, admits the subject into a culture compelling it to recognize and relate to the various images of the culture's identity. "To adopt these ways of understanding self-formulation is to recognize that we can never see ourselves other than in the images reflected back to us by society, which becomes, in effect, the mirror itself" (Muller). The mannequins, which serve as voice to society as well as Becky's thoughts, are also representations of the societal mirror Becky uses in order to gain an identity, i.e. place in the world.

The most notable change to the plot involves the ending. In both the book series and the film Becky is exposed as a fraud after she gains a reputation as a personal finance guru. As a result, her relationship with Luke ends and she sells her possessions in order to pay off her debt for a fresh start. However, the hypotext and hypertext vary over the outcome of Becky's relationship with Luke. In the novel, Becky moves to New York and becomes a personal shopper, a career she enjoys and succeeds at. It is only after Becky is secure and confident in herself that Luke comes back into her life. In the final scene of the second novel, Luke goes to see Becky at work and admits that he makes mistakes as well. The

two come to an agreement and figure out how to have a relationship in which they are equal partners. This is not the case in the film. In the hypertext Becky never becomes a personal shopper. Instead the audience receives a quick summing up of events in which Luke has given Becky a job at his new company. This new ending not only omits the novel's lesson of self-reliance, it also changes Becky's character to a damsel in distress.

With regard to the mise-en-scene, the film, Confessions of a Shopaholic, is filled with hues of pink and lilac. Becky is most often shown wearing bright eye-catching colors. Shots are framed in order to show off her wide-eyed excitement and surprise. The facial expressions and color choices make Becky appear childlike and naïve. The novels do not paint her as childlike, merely as slightly irresponsible. These filmic elements seem to align Becky with the protagonist Elle Woods of Legally Blonde. The metatextual alliance creates a sense that Becky cannot be taken seriously, just as Elle Woods was not taken seriously. Of course in Legally Blonde, Elle is redeemed by winning an important court case and proving her intelligence. Becky is stripped by such redemption by the inclusion of Luke's sweeping in to save the day.

Film adaptations of novels often change novelistic events for perhaps unconscious ideological reasons (Stam). The film Confessions of a Shopaholic was distributed by Touchstone, a subsidiary of the Disney Corporation. The process of Disneyfication often includes the incorporation of patriarchal ideology and conservative values which are seen as "common sense" (Mollegaard). It would appear that the intertextual dialog of the hypertext is in accordance with this belief. Becky is no longer a standalone heroine in charge of her own destiny, instead she must rely on Luke to give her a job and bail her out of the problems she created for herself. Becky goes through the steps of self-actualization just as she does in the hypotext although the final destination is greatly changed. It is a step backward instead of forward, back to the 18th century when Mary Wollstonecraft first pointed out the indignity suffered by women who must attach themselves to wealthy men (i.e. women ''must marry advantageously…their persons often legally prostituted") (Dargis). The change in ending undermines the entirety of the film. Where we once had a strong independent, yet wacky, young woman we now have a helpless shopping addict who must rely on her love interest to save her from her own addiction. This ending creates a disjuncture from the original intention of the novels.

Both versions of Confessions of a Shopaholic are at once a fun romp through consumer culture gone wild as well as a commentary on women's relationship to consumerism. Usually dismissed as fluffy, romantic comedies can comment on the complex world women in Western society inhabit. Consumerism and societal pressures create a situation that is all too easy for people like Becky to fall into. The intertexual dialogue of both the film and the novels match up very well until the close of the film in which Becky is denied the opportunity to gain a sense of self through her own means in favor of a conclusion that reinforces patriarchal values. Stripping Becky of her independence does a disservice to the Sophia Kinsella's authorial intent and sets up a dangerous president for young women. The departure from the original conclusion sends the message that it is not necessary to take responsibility for you actions. Happy endings result from a prosperous love matches not your own ingenuity or self-actualization. Messages such as this perpetuate the system from which Becky's problems stem, and makes it all the more likely for women to fall into the same situation; although these shopaholics will most likely have a similar happy ending.

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# Children in Postmodern Literature: A Reconstruction of Childhood

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Different ideas and forms of childhood have existed cross-culturally and across times, implemented differently in each society. The idea of childhood as we know it today, however, is one that has been argued to have developed from the rise of the European model of childhood, argued by Philippe Ariés to have begun in the 16th and 17th-century. Ariés, credited with "inventing" this beginning of childhood in his book *Centuries of Childhood*, has been noted as a groundbreaking source of study for the understanding of changing childhood ideas; he has been included in many books that attempt to criticize it today, such as John Beck's *Toward a Sociology of Education*. In this book, Ariés emphasizes childhood as a social construct, rather than an idea developed out of simply biological differences, saying "the idea of childhood is not to be confused with affection for children: it corresponds to an awareness of the particular nature of childhood, that particular nature which distinguishes the child from the adult…" (43). This socially constructed awareness reflects the differences in treatment that we see today in our society between children and adults.

We see this distinct separation between children and adults reinforced through societal institutions such as elementary schools, the juvenile justice system, pediatrics, and even in children's literature and ratings for movies. Within his argument of childhood being a social construct, Ariés also goes on to note that our ideas of childhood are more of a reflection of the adults who construct this idea through different means, than it is of children. This corresponds to the criticism that it is even in literature that children lack a voice; it is also in this lack of representation from children that adults have been able to control, manipulate, and convey their own messages using children and literature.

In specific examples of postmodern text and stories, we can see this deconstruction of the standard idea of childhood as a happy age of bliss, in which the authors impose adult emotions and understandings of the world around them in their child characters. Many of these depictions are disturbing in their treatment of children and incorporate these children existing in adult worlds and dealing with adult issues. As a result, these depictions become an effective literary tool in the sense that they add an element of shock value to the stories that catch and hold the reader's attention. Although themes such as violence, vulgarity, and sexuality often times are over-exaggerated and exploited in these stories featuring child characters, it begs the question of whether there is an element of truth in these stories through the ways children may have to deal more and more with the adult world today. Is the boundary and gap between children and adults in our society decreasing? And if so, then does postmodern literature exploit their child characters in their attempt to send adult messages through them? Or, are they reconstructing an idea of childhood that attempts to reflect the darker aspects of it – an aspect that may exist today, seemingly hidden behind the standard happy-go-lucky, ideals? By exploring these questions, the child's symbolic power also becomes important through the way it changes to fit the needs of the adults of that time. Within postmodern literature, we can see this symbolic power of the child changing in their use as agents of messages and catalysts of adult emotions, often responsible for sending heavy, politicized messages. It is within this use of the child to convey the messages of an adult that we can see the child becoming more intertwined within the adult world in postmodern literature and the distinction between child and adult slowly dissolving.

Looking at the ways postmodern literature subverts the standard idea of childhood, changing the symbolic power of the child, we can see how often times the child character embodies adult emotions and understandings of his or her surroundings. In the story "Zami: A New Spelling of My Name," found in the text *Postmodern American Fiction*: A Norton Anthology, Audre Lorde writes of her memory of herself as a four year-old child, and her longing for a companion in the form of another little girl. The beginning of the story is filled with seemingly innocent events that emphasize the childishness of her character, such as her hopes for a younger sister, her attempts at bartering in prayer for a little companion: "no matter what I promised God in return…" (147), and her superstitions that she believed would bring her a sister "I had decided that if I could step on all the horizontal lines for one day, my little person would appear like a dream…" (147). It is in these small, intimate beliefs of the child where we can see Lorde attempting to appeal to us as readers, as many of these innocent events are things that perhaps we too can relate to when we think back to our childhoods.

This initial innocence in her character, however, takes a different turn as the story continues. Lorde goes on to write about her phantom child's reactions when her little companion ("Toni") does happen to appear to her one day. Much of the description and actions of the child that follows has clear sexual innuendos and implications to them in the way that her child-self is physically interacting with her companion, going on to describe her child-self undressing and touching her companion. It is interesting to note the way that Lorde also seems to draw a parallel of the relationship between the child and her mother. She writes "…her eyes seemed to match both in a funny way that reminded me of my mother's eyes," (149); "perhaps she did not care that I was about to usurp that secret prerogative belonging only to mothers about to spank, or to nurses with thermometers" (151), and then goes on to write of her self-child, "I unbuttoned the

first two of them at the top, just so I could button them back up again, pretending I was her mother" (149). This parent-child relationship seems to be emphasized with the child's description of her mother's stern and strict attitude. Although the child's actions appear disturbing to us as readers, part of that disturbance is the way that Lorde interferes with our common idea of an absence of sexuality in childhood. Part of the story being alarming is the way in which Lorde actually transposes her adult self onto the phantom memory child, thereby giving the child's actions a disturbing adult quality to them, which in turn changes the way we view the child and her actions. In this way we can see the toddler dealing with what we would consider as more of an adult (or at least adolescent) issue, which is that of her sexuality.

Examining childhood, it is unavoidable to include fairy tales, as they have played such an important role constructing and reconstructing our ideas of childhood, and the ways in which children are able to use them to learn to cope with their surroundings. By analyzing postmodern fairy tales, there almost seems to be a return to the darker stories told to children during and before the early 19th century, primary changes involving different agendas, messages, and social issues of today. This becomes clear when analyzing postmodern reinterpretations of fairy tales and folktales, such as the story "I Am Anjuhimeko" by Hiromi Ito in the text *My Mother She Killed Me, My Father He Ate Me*, a collection of postmodern fairy tales edited by Kate Bernheimer. Within the story, a reinterpretation of a traditional Japanese folktale, Ito immediately begins with the destruction of the family realm through infanticide. The shocking beginning leads to the deceased, or once-deceased, infant crawling out of the sand she was buried in and beginning a search for her mother and father. This search, however, only brings the infant more graphic violence and pain, often times in the form of sexual abuse. In this strange and surreally graphic story, Ito's use of the infant character as a victim of such horrible events and circumstances, primarily due to the corrupt adults that brought the nightmare life upon her, is a clear intrusion on the more upheld notion of the sacred, innocent realm that children are believed to exist in.

In "Childhood and Adolescence" from *Europe Since 1914: Encyclopedia of the Age of War and Reconstruction*, John Merriman and Jay Winter write that children represented an "innocence that was assumed to be lost in the course of maturation. Paradise had once been seen as a place; now it was a stage of life" (566). This is an interesting idea to take into consideration when looking at fairy tales, both postmodern interpretations as well as their predecessors. When comparing the original collection of stories from the Brothers Grimm to the same stories that we tell children today, it is often noted that the tales we have been told and retold actually have darker, sometimes gorier, and usually scarier origins. In the first chapter of her book *The Hard Facts of the Grimm's Fairy Tales* entitled "Sex and Violence: The Hard Core of Fairy Tales," Maria Tatar writes of the horrors depicted in many classic fairy tales, ranging from "graphic descriptions of murder, mutilation, cannibalism, infanticide, and incest that fill the pages of these bedtime stories for children" (3). Listing the varying stories that depict these crimes, Tatar also writes of the child characters involved, who are most often than not victims of the corrupt adults surrounding them, such as the child characters in the stories "Hansel and Gretel," "Donkeyskin," "Cinderella," "The Juniper Tree," and more. Similarly, in postmodern stories, we can also see children who must operate in what would be considered as more adult worlds, in which they must learn to gain a sense of their identities and surroundings despite having to endure neglect, adult corruptness, violence, horror, and sexual violence. Tatar says: "sex and violence: these are the major thematic concerns of tales in the Grimms' collection…But more important, sex and violence in that body of stories frequently take the perverse form of incest and child abuse…" (10), and it is clear that her views on the earlier fairy tale versions are also true in postmodern stories involving children. The idea of childhood in these darker fairy tales (if there is one to begin with) seem to take on more of a "hellish" quality to them, rather than Merriman and Winter's "paradise."

In *Infant Tongues: The Voice of the Child in Literature*, Elizabeth Goodenough and Mark A. Heberle include a quote from Tatar in which she writes about "the child's lack of voice" and observes that it is in children's literature that adults are "recapturing their own experiences or creating stories about what it is like to see as a child does" (276). It is in poetry, however, that there seems to be a venue in which children's voices can be heard, and in different ways. It is also interesting to compare some of the poetry by children to some of the poetry by adults writing a reflection on their childhood. Between them, we can see the differences between an adult's nostalgia for childhood and a child's actual experiences and feelings on being a child. In the book *Dogs & Dragons, Trees & Dreams*, a collection of poems written by Karla Kuskin, we see examples of this longing for the freedom oftentimes associated with childhood. In her poem "The Question," Kuskin writes:

> People always say to me
> "What do you think you'd like to be
> When you grow up?
> And I say "Why,
> I think I'd like to be the sky
> Or be a plane or train or mouse
> Or maybe be a haunted house
> Or something furry, rough and wild
> Or maybe I will stay a child."

The adult nostalgia for the memories of childhood (or at least her ideas of it) are clear in the playfulness of the poem and in the longing for the past in her last sentence. In her depiction of a child wanting to remain a child,

we see a how she reemphasizes the sugarcoated ideals that seem to define childhood to many adults: freedom, imagination, and innocence. It is interesting to compare poems such as these with poems written by children. In the book *Small Kid Time Hawaii*, a collection of poetry by elementary school students in O'ahu, edited by Eric Chock, a variety of voices appear in the pages. In one of the poems, Peter Greenman of Ka'elepulu Elementary wrote:

> I will dig an opening
> in glass clouds in space
> and crawl through them.
> And I will find a hole in the deep
> and I will crawl down it
> and find myself here.

Another student, simply named "Jamie," of Ka'a'awa Elementary writes:

> I was mad and I got a knife
> But nobody was around
> So I put it back

Another student writes of whiskey and his father's use of alcohol. Within these poems, we can see children understanding and dealing with very real issues that we often times associate as more adult issues: violence, uncontrolled anger, how alcohol can destroy their family, and even a deeper sense of self-awareness than they as children are given credit for. It may be argued, then, that perhaps these children operate in much more adult worlds, due to their surroundings being less that of the innocent ideals of childhood and more of the issues of the adults in their lives.

Tatar has actually supported the idea of children being more exposed to the adult worlds. In an article on her from *Harvard Magazine* written by Craig Lambert entitled "The Horror and the Beauty," she states, "with exposure to media at early ages, children have access to what was once adult knowledge – they know what we didn't know until we were teenagers" (40). But she also goes on to say (or perhaps warn), "yet they are still infantilized, and more dependent on their parents than ever" (40). Perhaps this last thought, that despite children being infused in more adult worlds, though still as dependent on adults as ever, is also shown in the child characters in postmodern literature. Both Anjuhimeko and Lorde's child-self still seem to yearn for the acceptance of the adults around them, and their dependence on adults to take care of them in order to survive are clearly depicted as well.

Examining the way childhood is depicted through different forms of writing, such as fairy tales, fiction, historical texts, and postmodern reinterpretations, we can see an interesting paradox between the ways children are expected to experience their childhood and what they actually deal with. Taking into consideration the socioeconomic and rapid technological advancements being made today in our society, such as with issues of cyber-bullying, porn on the internet, violence and vulgarity in video games, and more, an interesting paradox arises in postmodern literature, as it seems to both exploit, while also reflect a sense of truth into the child character and his or her world. Although exaggerated and disturbing, perhaps postmodern literature can reflect a sense of the reality of children having to deal with more adult issues today, therefore of them having to live in more adult worlds.

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# The Modern Cinderella in Chains: The Maiden in Servitude

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"Fairy tales have always been in a state of reincarnation" (Crowley); and thematic elements originating in fairy tales, such as portrayals of the female, and interfemale relationships, often reincarnate their way into film, either consciously or unconsciously. These familiar archetypes and motifs reveal important ingrained and conditioned ideologies about women as well as primitive the upwelling of fears and desires from the subconscious. Of the various types of female relations portrayed in fairy tales, the dichotomy of the representation of the older "Wicked Stepmother" in contrast with her young "enslaved" maiden has become an expected staple of the genre. In postfeminist films of the present day, this "Cinderella" theme of enslavement of young females by unjust, draconic, or tyrannical older females who take on a matriarchal role of authority is evident in the Japanese animated film Spirited Away (2001) and the American film The Devil Wears Prada (2006).

There are hundreds of Cinderellas in film. The overwhelming majority of which are modeled off the sanitized and child-friendly animated version of the folktale created by Walt Disney in 1950. In the creation of his film Disney drew heavily from the tale variation transcribed by Frenchman Charles Perrault in 1697 in his slim anthology *Histoires ou contes du temps passé, avec des moralités: Contes de ma mère l'Oye*, or *Stories or Tales from Times Past*, with Morals: Tales of Mother Goose. Disney's influence on the genre of fairy tale films has been so great that "it has been virtually impossible for any filmmaker born after 1945 not to have been exposed to a Disney fairy tale film as a result of the powerful marketing and distribution of all products by the Disney Corporation" (Greenhill xi). As such, many present day filmmakers often incorporate intertextual references to Disney's fairy tales. This incorporation of elements from Disney's films often originates from the animated works that were influential in the filmmaker's own development either as an individual or as an auteur. Many films we may not recognize as "fairy tales" can contain thematic elements unnoticed at first glance due to Walt Disney's all encompassing domination of the genre, such as Steven Spielberg's A.I.: Artificial Intelligence which contains a significant parallel to Carlo Collodi's *Pinocchio* (Greenhill). Through his ingenuity and marketing Walt Disney has "established a model of conformity that hundreds of other filmmakers have followed up until today" (Greenhill xi).

In Disney's further sanitization of Perrault's already heavily sanitized and didactical tale he preserved the role of virginal heroine for Cinderella and the role of villain for the "Wicked" stepmother. Indeed, it would hardly be "Cinderella" without the wickedness of the stepmother, as "[t]he plots of 'Cinderella' stories are driven by the anxious jealousy of biological mothers and stepmothers who subject the heroine to one ordeal of domestic drudgery after another" (Tatar 102). In both Spirited Away and The Devil Wears Prada the false-mother characters of Yubaba and Miranda Priestly (Meryl Streep) inflict virtual enslavement while the young maiden protagonists must attempt to prove their goodness through industry in order to ultimately achieve independence from her Wicked Stepmother. In these modernized films the third-wave feminist movement's promotion of the self-fulfilled and independent female have produced more industrious, proactive female characters, who, while seeking a path to independent womanhood, do not find fulfillment (as the elder Cinderella did) in matrimony and connubial bliss.

In the animated film Spirited Away, Hayao Miyazaki, the auteur, has portrayed Chihiro (voiced by Rumi Hiragi) as a girl on the cusp of adolescence. As she transgresses into the spirit world her true mother is transformed into a pig and is then replaced by the maternal tyranny of Yubaba, the proprietress of the bathhouse and a literal "wicked witch". Her employment with Yubaba consists of the domestic drudgery, such as cleaning floors, and generational conflict that typifies Cinderella plots. This replacement of the good mother with a bad "mother" is indicative of Freudian theories of childhood growth and attitudes towards Wicked Stepmothers and parental figures in traditional fairy tales. Karen E. Rowe (and Bruno Bettelheim) suggest, "As the child matures, she becomes increasingly conscious of conflicting needs for both infantile nurturing and independence…By splitting the maternal role" the child can safely act out aggressions toward this bad false-mother (Rowe 213). In Spirited Away, The Devil Wears Prada and Disney's Cinderella this is expressed in their rebellion and expressions of distaste for the mother figure. Another Freudian aspect of the conflict and slavery of the Cinderella is the coveting of, and competition over, males in the semi-Oedipal conflict in Spirited Away over the young male dragon Haku who is apprenticed to Yubaba. This jealous guarding of males is also present in the traditional Cinderella tale in the desire for the presence and attention of the father, and can also be seen in The Devil Wears Prada in a scene where Andrea "Andy" Sachs (Anne Hathaway) accidentally invades the home of Miranda Priestly and disturbs Priestly and her husband in an intimate environment and must cope with a vindictive, retaliatory load of nearly impossible domestic chores foisted upon her by Miranda Priestly. In The Devil Wears Prada, an adaptation of a book by the same name by Lauren Weisberger, the maternal tyranny of Miranda Priestly, like the traditional "Cinderella" is also inflicted through menial tasks and chores upon Andrea. In Perrault's own words, "She employed her in the meanest work of the house. She scoured the dishes, tables, etc., and cleaned

madam's chamber."

In both of these films "[t]he stepmother…who invariably appear[s] odious, embod[ies] the major obstacles against [the] passage to womanhood" (Rowe 212). In Spirited Away Chihiro, a ten-year-old is at the cusp of adolescence while Andrea, a woman in her early twenties, in The Devil Wears Prada is seeking a path to maturity and independence through her career. Both Andrea and Chihiro's progress to womanhood is impeded by the Wicked Stepmothers they encounter, these "stepmothers habitually devise stratagems to retard the heroine's progress" (Rowe 212). The most prominent stratagem in these Cinderella tales are the domestic chores foisted upon the heroine. However, as in many of the original Cinderella tales, in both Spirited Away and The Devil Wears Prada the stealing of identity and the loss of name also features as an important blockade toward success. This loss of identity is more prominently visible in Spirited Away in which Chihiro must contractually exchange her name with Yubaba for a new one, Sen. But is also touched on in The Devil Wears Prada in a scene in which Miranda Priestly calls Andrea Sachs by an incorrect name, the name of her other assistant, Emily, and is unresponsive and even dismissive to Andrea's attempts at correction.

As Wicked Stepmothers Miranda Priestly (who is compared to the devil in the title of both the book and film which contrasts ironically with her masculinized clergical name) and Yubaba portray characters that have "become a stock figure, a fairy-tale type that invokes a vivid image at the mention of her role" (Williams). The formation of the intrinsic nature of the stepmother to the fairy tale genre has been solidified, not only by Disney, but by other anthologists of folklore as well. In her article "Who's Wicked Now? The Stepmother as Fairy-Tale Heroine" Christy Williams notes "the Brothers Grimm made editorial changes to various stories from one edition of their collection to the next. These editorial changes led to the absent mother and the wicked stepmother becoming staples of the fairytale genre" (Williams). The most preferred theory as to the reason the Brothers Grimm inserted the character of the wicked stepmother into their tales is the preservation of the sanctity of motherhood. By inserting the stepmother the real mother remains pristine and maternal in the tales of the Brothers Grimm. The first volume of the Brothers Grimm's anthologies *Kinder- und Hausmärchen* (Children's and Household Tales), which contains their version of "Cinderella", was published in 1812, over a century after Perrault took up his pen. The movement toward the "wicked stepmother" imploded with the advent of second-wave feminism in the 1950s. Reactionary and alternate feminism narratives (such as Emma Donoghue's anthology *Kissing the Witch: Old Tales in New Skins*) explore avenues for Wicked Stepmothers that are mirrored in our third-wave mass media in more generic and "palatable" ways. The feminist movement has also inspired an exploration of the traditional tales where scholars have further analyzed the powerful nature of the Wicked Stepmother. As Alison Lurie states, "The contrast is greatest in maturity, where women are often more powerful than men. Real help for the hero or heroine comes most frequently from a fairy godmother or wise woman, and real trouble from a witch or wicked stepmother" (Lurie). However, other scholars, such as Karen E. Rowe and Maria Tatar are more critical of the possible profeminist nature of these tales. In contrast Rowe seems to believe that despite the leading female roles, patriarchy exudes an invisible iron fist in the tales (particularly in the form of the Oedipal competition between Cinderella and her mother, and the role of the Prince). While the magical power of the witch and the godmother character-types and their influence over the material world cannot be ignored, their characters are representative of marginalized power (particularly in the case of the Fairy Godmother who is often absent for the majority of the tales) in comparison to the ever-present political power of the Prince.

In the postfeminist films Spirited Away and The Devil Wears Prada the Wicked Stepmothers have evolved at the end of the tales. In Spirited Away Yubaba's identical twin Zeniba demonstrates to the audience that the Wicked Witch and the Fairy Godmother can be two sides of the same coin. Zeniba aids Chihiro, as all Fairy Godmothers aid their Cinderella's path to womanhood and her escape from the Wicked Stepmother (Rowe). While Chihiro never does go to a fanciful ball, Andrea does. Miranda Priestly's inclusion of Andrea into her trip to Paris for the Parisian fashion week recasts her into a Fairy Godmother figure that both transforms and transports her ward to the ball. Miranda Priestly's conditions for allowing Andrea to go to this Parisian ball mirror Perrault's Fairy Godmother almost exactly. "'Well,' said her godmother, 'be but a good girl, and I will contrive that you shall go.'" However, for filmmakers and for audiences the exclusion of the wicked stepmother can bring up troubling issues in plot, for "[i]f the stepmother is no longer simply 'wicked' and no longer the villain of the story, who is the villain?" (Williams). And as the villainess loses her wickedness she begins to lose her traditional ugliness as well, which begins to break the traditional dichotomy of youth, goodness and beauty versus age, wickedness, monstrosity and ugliness.

Paradigms of beauty feature heavily in all Cinderella tales and films, and are a notable aspect of the film The Devil Wears Prada. Priestly oversees the fictional fashion magazine "Runway", and thus fashion and beauty become integral parts of the plot. However, the importance of beauty is not limited to Cinderella, within nearly all fairy tales there are mentions of physical beauty, especially where it concerns young burgeoning females. In Cinderella tales the maturation of the young girl signals the waning of sexual attractiveness for the aging stepmother and by extension her loss of control (Rowe). Lori Baker-Sperry and Liz Grauerholz's survey of the Grimm's tales (2003) totaled the times young females, young males, older females and older males

were described as beautiful within the traditional fairy tales. Young females were most often described as beautiful, far surpassing the other categories. Baker-Sperry and Grauerholz also analyzed the tales for significance of beauty and concluded, "this emphasis on a feminine beauty ideal may operate as a normative social control for girls and women" (Baker-Sperry 723). This social control works on a process of rewards versus punishments, rewards for the good (Cinderellas) and punishments for the bad (Wicked Stepmothers). "Many tales connote goodness with industriousness, and both with beauty, and characters are 'rewarded' for their hard work" (Baker-Sperry 719). In these tales, as in Perrault's and Disney's Cinderellas, Spirited Away and The Devil Wears Prada, ugliness and old age are connected to wickedness and goodness to beauty and youth (Baker-Sperry).

> Because cleverness, willpower, and manipulative skill are allied with vanity, shrewishness, and ugliness, and because of their gruesome fates, odious females hardly recommend themselves as models for young readers [and viewers]. And because they surround alternative roles…[such as] fiendish stepmothers with opprobrium, romantic tales effectively sabotage female assertiveness. By punishing exhibitions of feminine force, tales admonish, moreover, that any disruptive non-conformity will result in annihilation or social ostracism. (Rowe 218)

This process of reward and punishment is shown in The Devil Wears Prada, where a confusing mix of surface feminism in the choices made by the down-to-earth Andrea is contrasted with undercurrents that undermine female aggression and ambition, exemplified in the character of Miranda Priestly as her personal life dissolves while the pair is in Paris. According to the Baker-Sperry and Grauerholz study in nearly 20 percent of the tales there are links between beauty and jealousy that almost exclusively concern female characters (719). This jealousy of beauty, youth, and attractiveness exhibits itself most prominently in the mise-en-scène of both Spirited Away and The Devil Wears Prada. The older women, Miranda Priestly and Yubaba, both show symptoms of the Disneyfication process, the process that Disney repeatedly used in his films to signify who is a villain and who is not. Their heavily made-up faces, grey and/or white hair, strikingly arched brows, and obsession with opulent material goods such as rings and clothes exemplify this process and designates from their first appearances on screen that they are not intended to be likable characters to the audience (Mollegaard). As in all "[r]ecent Disney films and even contemporary feminist retellings of popular fairy tales [that] often involve women who differ from their earlier counterparts in ingenuity, activity, and independence but not physical attractiveness" (Baker-Sperry 722). Despite both films' supposed pro-feminist message and the reoccurrence of strong female leads in all of Hayao Miyazaki's films, both Chihiro and Andrea are adorable and portrayed as pretty in a modest way.

Feminism amidst the fairy tales has evolved, as has the end of Cinderella's tale, Cinderella herself, and her Wicked Stepmother. In many modern variations Cinderella's traditional passivity has been reimagined. As it has in the endings of these films, in which the maiden protagonists free themselves from slavery through action and choice and are catapulted into womanhood: Chihiro by actively seeking solutions and Andrea by making a significant choice. Rather than just proving goodness by obedience like their traditional counterpart, Chihiro and Andrea rebel in their bids for freedom and by doing so gain independence. Andrea and Chihiro vary significantly from their more traditional counterparts and there is no doubt that both Andrea and Chihiro manipulate their own destinies at the culmination of their respective films. However, "simply reversing patriarchal binaries – making the primary female character strong, confident, politically astute, and forceful, instead of weak, doubting, naïve, and self-effacing – is insufficient to create an image of a postpatriarchal world" (Greenhill 21). These modernized versions of happily ever after offer alternatives to outdated chauvinistic portrayals of the female. "[M]any modern women can no longer blindly accept the promise of connubial bliss with the prince" (Rowe 211) and our films reflect this dissatisfaction and disillusionment. Yet, "Even in the 'liberated' twentieth century, many women internalize romantic patterns [and the myth of romantic love] from ancient tales"(Rowe 222) and similarly young girls internalize these patterns from films like Spirited Away and their older counterparts internalize the same from so-called 'chick flicks' like The Devil Wears Prada. "Today women are caught in a dialect between the cultural *status quo* and the evolving feminist movement" (Rowe 223). This schism of desires, to *be* desired (as the passive Cinderella of Perrault) or to desire for ourselves (as Andrea and Chihiro do) is relevant to women's issues within and without the cinema. "[These] artistic re-creations of fairy tale plots and characters in film…are significant because they mirror possibilities of estranging ourselves from designated roles" (Greenhill xii). Furthering the process of fairy tale reincarnation and reinventing what it means to be a Wicked Stepmother or a Cinderella.

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# Agatha: The Subversion and Reflection of the 1940's Femmes Fatales in the Neo-Noir Film Minority Report

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The femme fatale, or the "fatal woman," has been primarily analyzed in her relation to men throughout the original film noir of the 1940s, an aspect that femmes fatales of the more contemporary neo-noir films are not exceptions to. Descendants of neo-noir films still reflect and embody aspects of the femmes fatales of the 1940s despite operating in different time eras – therefore, different social expectations and norms of gender. It has been argued that due to the historical backdrop of the 1940s in America (such as film censorship, the ending of the Great Depression, post-war anxiety of WWII, anxiety of women in the workforce), the femmes fatales reflected the American psyche at that time, as Barbara Hale suggests in her essay "Projecting Trauma: The Femme Fatale in Weimar and Hollywood Film Noir" when she says that writers and directors "projected their anxieties onto the character of the femme fatale" (225). It is in this way that contemporary neo-noir femmes fatales may be seen as subversions or even rebels of the definitions that confined their predecessors; they are arguably no longer bound by the same historical context and social norms, therefore allowing them more flexibility in their identities in neo-noir films. It is also this flexibility, however, that it becomes clear the roles of women in neo-noir are still limited, as well as more difficult to define. By analyzing the characters Agatha (Samantha Morton) and John Anderton (Tom Cruise) from the neo-noir thriller Minority Report in relation to interpretations of multiple theorists of femmes fatales from the 1940s film noir, this paper will explore the ways in which a modern femme fatale figure can both rebel and be victim to the confinements of the original femmes fatales.

The dichotomy between victim and rebel that seems too often be highlighted by theorists is situated interestingly in the realm of the imaginary conception of "PreCrime,"[1] in the neo-noir film Minority Report. Both Anderton, the chief of PreCrime, as well as Agatha, a "precog" or "precognitive,"[2] who is at the very heart of PreCrime, embody and balance the dichotomy of victim and rebel with their involvement in the department of "PreCrime." In the film, Chief John Anderton works to prevent crimes -primarily murder - from happening as a part of the Department of PreCrime, which exists because of the ability of the three "precogs": Agatha and her two brothers. Anderton, however, finds himself going against the Department of PreCrime in an attempt to prove his innocence when his name appears as a future murderer. Agatha becomes an especially valuable asset in the film when Anderton learns that she somehow is the most powerful out of the three in that her vision is stronger. In his attempt to prove he is being framed, he "steals" Agatha from the glass tank where she and her brothers reside day after day, and escapes with her.

Though seeing Agatha as a femme fatale may seem far-fetched, considering most traits of the iconic femmes fatales seem absent from her, the clear subversions of these qualities in Agatha make a statement about the femme fatale in a contemporary film and setting; therefore, it may be argued that she is both a departure from and a reflection of the original femmes fatales. It is in Agatha that we can see a more literal translation of the ideas of the femmes fatales of classic noir films. When we first meet Agatha and her brothers in the beginning, we learn that Wally, the caretaker of the precogs, uses dopamine and endorphins among other forms of sedation to control the precogs, who reside in a small pool filled with gel-like substance in a tank in the Department of PreCrime. Following this scene Anderton adds to this saying "It's better if you don't think of them as human…pre-cogs are pattern-recognition filters, that's all." Since much of the focus seems to be primarily on Agatha and not on her brothers, this may be interpreted as an example of portraying the woman character as an "Other," or an entity that is depicted as abnormal in contrast to another through a binary that consequently undermines the power of the former. Within this we can see how Agatha's role as an "Other" has taken on a more literal translation, in which she is now literally turned into a non-human, another creature whose innate power should be controlled, caged, and used. It is in the way that the precogs are used that the viewer is able to see another problematic situation, in which these three people ironically seem to not have any rights or choices of their own and are being used for the better of society so that others may live. There is a parallel in the way that the precogs live with the pre-murderers who are arrested and left to rot in a sort of cyberspace encasing, forever unaware of their surroundings.

When examining the femme fatale, one of her main features initially noted is her physical beauty and the often glamorous or high-end accessories she wears. Often times theorists will mention the physical beauty of the actresses that played femmes fatales, such as Joan Bennett, Rita Hayworth, and Ava Gardner, among others, as well as the beauty they gain from their attire and jewels, determining how they uses their beauty to get what they want. In his essay "The Man's Melodrama: The Woman in the Window & Scarlet Street," Florence Jacobowitz writes of the fashion of the character Alice Reed "…her overstated attire (the sequined and feathered hat, the cigarette, the sheer chiffon dress which suggests her nudity), and … her over-determined slow-paced speech…" (155). Unlike Rita Hayworth's "Gilda," Joan Bennett's "Alice Reed," or Jane Greer's "Kathie," Agatha diverges from this conventional sense of beauty (thus from the conventional femme fatale) in the simplicity of her attire and physical appearance. Instead of glittering coats and beaded purses, Agatha wears a modern, sleek unisex suit (which her brothers both wear as well); and, instead of perfectly coiffed curls, her head is completely shaven. Both of these traits denote a lack of predominant ideas of femininity and instead bring more of a sense of androgyny to the femme fatale. In the shots in which the three precogs are seen floating in the pool, it is unclear as to the genders or sex of any of them.

Agatha's lack of any sense of prevailing ideas of femininity may even represent a suppression of her sexuality as well. Along with her androgyny, she also seems to be an asexual character, both of which lends to a feeling of mystery about her. In chapter five entitled "Gilda: Epistemology as Striptease" of her book Femmes Fatales: Feminism, Film Theory, Psychoanalysis, Mary Ann Doane writes "the fact that the femme fatale in film noir is characterized as unknowable (and this is the lure of her attraction) has frequently been noted…" (102). This "unknowable" aspect seems to reflect the physical aspect of Agatha (in her androgyny and perceived asexuality) and psychological aspect (in her ability to see future crimes). Due to her lack of sexuality and

perceived feminine conventions, Agatha subverts this main trait of the classic femme fatale, who relies mainly on manipulation and domination of her sexuality over the men around her. Hales writes, "The threat posed by the oversexualized woman symbolizes her weakened male counterpart" (227); perhaps it is this threat she as a woman poses that may explain not only the perceived suppression of her femininity, but also her lack of a voice and choice over what happens to her.

Hales also focuses primarily on defining the femme fatale not only in her manipulation of her beauty and sexuality, but also in her relation to her criminality. She states, "It is the femme fatale and her relationship to the criminal underworld that undermines the protagonist's bourgeois values and highlights the danger and allure of the street" (229). Though Agatha is in a sense a portal through which Anderton has access to the "danger and allure of the street," it is through her that he sees the evil crimes that people will commit; it seems that her relationship to this "criminal underworld" and her use as a precog is not a choice of hers and is out of her control. Many of the classic femmes fatales choose to involve themselves in the world of the criminal underground, but in Agatha we see her connection to the underground as either an innate "power," which seems to cause her suffering, or a choice that is made for her by others for the benefit of the public. It becomes clear that Agatha is not treated as a human with rights of her own; strapped to her makeshift bed in a pool, she is not allowed to care for herself but is taken care of and infantilized by her caretaker, Wally. Nowhere in this portrayal of her do we see Agatha assert herself or any sort of control over her surroundings or the events that take place around her, not even when Anderton kidnaps her from the pool.

Another way in which Agatha is a departure from the classic femme fatale is that she is more of a victim than an instigator of crime. Hales writes, "the femme fatale as psychotic criminal is a monstrous sexual entity who lies, steals, and murders" (232). Though she can perceive crime that will happen and is at the core of the PreCrime system, she herself is not actually a part of the crimes, but simply acts as a preventative agent, and not a "psychotic criminal." It is interesting to note that in her innocence and perceived suffering there is a subversion of the important aspect of the femme fatale being a part of the darker, criminal parts of society. When the representative of the attorney general of the president (Colin Farrell) asks Anderton if he can meet the precogs, Anderton refuses, saying "Cops aren't allowed inside the temple." By referring to the pool where they reside as the temple, he gives the precogs a sense of divinity and indirectly suggests a connection to the divine through them. In doing so, Anderton simultaneously further dehumanizes them and reinforces Agatha's perceived otherworldliness and innocence from the awful scenarios that appear in her mind. In terms of cinematography and costumes, this innocence and cleanliness is further emphasized in the pale coloring of the precogs in their pool of light blue gel, softly lit up by a string of white lights that encircle them.

The idea of Agatha as a "fatal woman" is not completely invalid and without its points. Following her abduction from the pool by Anderton, it can be interpreted that although she aids Anderton on his quest to avoid the PreCrime department and find out who framed him, she also becomes a major part of his downfall. In analyzing the film The Woman in the Window, Jacobowitz writes of the results of Professor Wanley's involvement with Alice Reed:

> She promises her illicit and forthright sexuality in typical femme fatale tradition, but delivers a nightmare of murder, blackmail and deceit. The hero is destroyed, losing his respectability, his social position, his money, his dream girl (154).

Hales supports this by saying that the femme fatale "lures men into danger, destruction, and even death by means of her overwhelmingly seductive charms" (227). Though Agatha is portrayed much more as a victim than these earlier femmes fatales, elements of these femmes fatales are manifested in her in the sense that she indirectly causes Anderton's demise in his reputation as chief of PreCrime, his financial stability and his social status. It seems that instead of her sexuality luring Anderton into "danger, destruction," it is her power as a clairvoyant that is her "seductive" element. Just as beauty seems to be the femme fatale's curse, so it is that Agatha's ability to see the future seems to curse her as well. In a way, Agatha does deliver "a nightmare of murder, blackmail and deceit." Through her, the detectives are able to gain access to the worse crimes that occur in the future, and it is through her that Anderton's name shows up as that of a future-murderer. It is also in this sense that Agatha is a major part of Anderton's initial downfall in that his name appeared in PreCrime because of her, but perhaps it would be more accurate to say that she represents a reluctant danger to Anderton, as she never chose to be abducted by him in the first place and clearly does not have control over who she sees is a murderer.

Another important quality about the femme fatale that Jacobowitz writes of is his theory that she is "the embodiment of [the male's] repressed desires" (154). Hales furthers this idea, writing "…film noir of the 1940s and 1950s conveys the crisis of male identity resulting from World War I by way of the femme fatale character" (224), and goes on to say that "men then transfer their damaged psyches onto the character of the femme fatale" (227). Because Agatha is constantly surrounded by other men such as her brothers and the male detectives of the PreCrime Department, it would be difficult to determine exactly whose repressed desires she would represent. Rather than representing a singular male's repressed desires, Agatha seems to completely subvert this notion in that she instead seems to embody society's deepest and repressed fears. In her horrifying visions and nightmares, the detectives are able to gain valuable knowledge and insight into the darkest, ugliest side of the people who make up society. It is suggested that Agatha's power to see the future takes a toll on her in that she must relive the trauma, evil, and fear of the events and people she sees. The scene after Anderton's arrest of the man who finds his wife cheating on him suddenly cuts back to a shot of Agatha eerily repeating what the wife was saying to her husband. Again we can see a more literal embodiment of society's anxieties in the female character.

In examining the significance of Agatha's forced responsibility to see future crimes before they occur for the benefit of society, Hales' idea of woman embodying life and death take on new meaning. She writes "She embodies at once 'Nature and Artifice' and 'Life and Death,' depending on the contradictory expectations expressed toward her by man" (184), and goes on to use her femme fatale example to support this, saying "Terry controls life and death in her role as a murderess" (232). Because Agatha's ability to see the future is the foundation of the PreCrime department, it is technically true that she embodies both "life and death;" she can indirectly save

people through detectives such as Anderton, and can also show through her visions those who should be put away for the rest of their lives. It is depicted that even the chief himself is no exception to Agatha's visions, when Anderton's name crops up as a future murderer.

Though it seems to contradict Agatha's victimization by the men that protect her, including Anderton, it seems that there is a similarity in her perceived partnership with him that occurs later in the film with Jacobowitz's interpretation of The Woman in the Window. Jacobowitz examines the strange partnership that seems to arise between Professor Wanley and the femme fatale Alice Reed in the classic film noir. He writes:

> In fact, Alice is less a feared Other than a mirror image; she represents an inversion of the classic notion of the femme fatale. She is a projection of what Wanley wishes for himself (youth, spirit, adventure) (157).

This partnership is depicted in a much more obvious manner in Minority Report between Anderton and Agatha, and can even be interpreted as a mutual one. Anderton realizes that he needs Agatha in order to remain alive and to figure out who framed him, and Agatha realizes that she needs Anderton for her own safety as he takes her outside of the confines of the PreCrime labs and into the unknown outside world. This mutual partnership parallels the idea of the femme fatale and the hard-boiled detective as the "mirror image" of each other, as mentioned by Jacobowitz. In chapter one entitled "La Belle Dame Sans Merci and the Neurotic Knight: Characterization in The Maltese Falcon" in his book The Fatal Woman: Sources of Male Anxiety in American Film Noir, 1941-1991, James Maxfield writes of the detective and the femme fatale in The Maltese Falcon:

> Spade is attracted to Brigid not only because she is a beautiful woman but also because she is a dark mirror image of himself. She also doesn't want anyone to get the better of her (21).

The idea of the mirror-image seems to imply a partnership between the two; however, in the case of The Maltese Falcon, in which both detective and femme fatale are corrupt and dangerous, this darker partnership is inverted between Anderton and Agatha, whose partnership forms out of Anderton's victimization in being framed and Agatha's reliance on him to survive outside of the pool that was her home. In this way, Anderton's victimization brings out Agatha's, and they both must develop a mutual trust in order to survive. This mirroring, that is either a cause or effect of their partnership, is also depicted in a symbolic shot of Anderton and Agatha's profiles in opposite direction, depicted in such a way that it is difficult to tell where one of them begins and the other ends (see Fig. 1).

Though Agatha differs from the original femmes fatales in many aspects, including her physical traits, her clairvoyant power, her relationship to the men surrounding her, and her relation to crime, there still seems to be remnants of them in the ways in which she subverts their original qualities. Her departure from the original qualities of the "fatal women" of the 1940s may not only suggest a new identity for the contemporary femme fatale, but a shift in the power dynamics between the femme fatale and the men that seemingly control her. Through her subversions of the original qualities and her role as a different representation of danger, we see a sense of rebellion towards the conventional attitudes towards women as femmes fatales in a contemporary neo-noir film. Although she is just as much confined to the patriarchal system that the classic femme fatale was, her innate power and her allying with Anderton affords Agatha a departure from the depictions of earlier femmes fatales, and in turn allows her to gain a sense of identity and power in a way that earlier femmes fatales could not.

Fig. 1. Minority Report. Samantha Morton, Tom Cruise, scene still. Dir. Steven

**Notes**

[1]The police department that Anderton works for which specializes in capturing, convicting and imprisoning criminals before the crime they are guilty of actually occurs.

[2]When combined with her two brothers, Agatha and her unique siblings (under the control and care of the PreCrime department) are able to provide Anderton with visions of future crimes that will occur in the near future, specifically ones that either focus on or end in murder.

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Minority Report. Dir. Steven Spielberg. Writ. Philip K. Dick, Scott Frank, Jon Cohen. Perf. Tom Cruise, Colin Farrell, Samantha Morton. Twentieth Century Fox Film Corporation, 2002.

The Maltese Falcon. Dir. John Huston. Writ. John Huston, Dashiell Hammett. Perf. Humphrey Bogart, Mary Astor, Gladys George. Warner Bros. Pictures, 1941.

The Woman in the Window. Dir. Friz Lang. Writ. J.H. Wallis, Nunnally Johnson. Perf. Edward G. Robinson, Joan Bennett, Raymond Massey. Christie Corporation, 1944.

# No ka Moe ʻana o nā Aliʻi Nui

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ʻO ke ala o ke aliʻi pono, he ala ia e keʻakeʻa mau ai i nā koina a pilikia he nui. Pāhaʻohaʻo ʻole hoʻi ka nui ʻole o nā aliʻi kūpono i ka wā kahiko, e like hoʻi me ka manaʻo a John Papa ʻĪʻī lāua ʻo Samuela Kamakau. ʻO nā koina hana o ke aliʻi kua wela, ʻo ia nō ke keu o nā hoʻopilikia mai, no ka mea, no lākou nō ke kuleana o ka ʻai aupuni. A no laila, ʻoiai naʻe he ʻano nui paha ko kākou manaʻo ʻana aku he poʻe palaualelo a hoʻolauleʻa ia mau aliʻi kapu e kaumaha ana ma ka poʻohiwi o nā makaʻainana, ʻaʻole paha ia ka ʻoiaʻiʻo. Mai ka wā i moe pū kona mau mākua, he luʻuluʻu ke aliʻi kapu i ka mana o kona kūlana.

Wehewehe ʻo Davida Malo i ke ʻano o ka moe ʻana o nā aliʻi. A ma kona wehewehena, he ahuwale ke kumu nui o ia moe ʻana. Aia kā hoʻi i ka inoa o kēlā hoʻomoe mua ʻana i aliʻi nui wahine me aliʻi nui kāne ia, he hoʻomau keiki. I loaʻa mai nā aliʻi nui kapu wela ma ke kua ia hana, ʻo ke aliʻi nāna e pono ai ka lāhui. A wahi hoʻi a Malo, ʻo ka pilina kūʻauhau o ua mau aliʻi nui ʻelua nei, pēlā e ʻike ʻia ai ke kiʻekiʻe a me ke kapu o ke keiki. ʻO nā aliʻi kapu kiʻekiʻe, hānau ʻia mai ka moe ʻana o ʻelua paha aliʻi i pili ʻohana (Malo, mok. 18).

I loaʻa mai he kapu aliʻi kiʻekiʻe loa, he kapu kua wela a hahana, ʻo ka "moe" nō ia, e hoʻopalau ʻia nō he kaikunāne a kaikuahine i like nā mākua ʻelua o lāua.. ʻO ia mau mākua hoʻi, ua like ko lāua mau mākua ponoʻī, ʻo nā kūpuna ia o nā mea e hoʻopalau ʻia ana. He moe piʻo nō hoʻi ia hana. Inā ʻaʻohe kaikuahine a kaikaina paha e hoʻopalau ʻia ke aliʻi nui, e hoʻomoe ʻia nō paha i kekahi kaikamahine a keikikāne paha a ke kaikaina a kaikuaʻana, a i ʻole i kaikuahine a kaikunāne paha o kekahi makua ona. ʻO ke keiki e loaʻa mai mai ia moe ʻana, i kapa ʻia he "hoʻi", he keiki paha ia o ke kapu noho a me ke kapu moe. Inā hoʻi e moe nā aliʻi nui he kaikuahine a kaikunāne o ka makuahine hoʻokahi, akā he ʻokoʻa nā mākuakāne, he "naha" ia moe ʻana, a ʻo ka loaʻa mai, he kapu noho nō. ʻO ia wale nō nā ala e loaʻa mai he aliʻi nui i kapa ʻia he akua, wahi a Malo. Eia hoʻi, ʻo kēia mau moe ʻana, ʻo ka moe mua ia a nā aliʻi i loaʻa mai ka makahiapo (Malo, mok. 18, p.10-15).

He hōʻoia kā Kamakau i kēia mau mea o luna aʻe nei ma loko o kāna *Ke Kumu Aupuni*, me kāna ʻōlelo like ʻana no ke kumu o ka moe nīʻaupiʻo ʻana o nā aliʻi, i loaʻa mai he akua, i loaʻa hoʻi he keiki. ʻAʻole ʻo kēia moe ʻana he pili ipo, he hana ia e mau ai ke kūʻauhau aliʻi nui. E laʻa hoʻi me kēia ʻōlelo ma lalo nei:

> "'Aʻohe nō he minamina o Kamehameha i ka hoʻomoe i kāna mau kaikamāhine ponoʻī i kekahi aliʻi pupuka; aia kona manaʻo nui ʻo ka loaʻa mai o ke keiki... a loaʻa mai ke aliʻi, pau aʻela, ʻaʻole ia o kāna kāne, ʻaʻole hoʻi ia ʻo kāna wahine" (Kamakau, helu 39, aa. 189, p. 23-24).

A no ke aha hoʻi he koʻikoʻi ia hoʻomau keiki ʻana me ka moe mua o ke aliʻi nui kāne a wahine ʻōpio? No ka mea, ʻo ka makahiapo, ʻo ia ana ke aliʻi nāna e lilo ke kapu moe iā ia, a nona nō hoʻi ke kuleana o ka ʻai aupuni ʻana, wahi a Malo. ʻO nā aliʻi ma hope mai, nā kaikaina a pōkiʻi nō hoʻi, he poʻe aliʻi nō lākou e kākoʻo ana i ka ʻai a ka hiapo. Pēlā ʻiʻo paha ka ʻoiaʻiʻo o ia hana. Na Kamakau i hōʻike mai iā kākou i ʻikepili hunahuna e kohu kākoʻo ana i ia manaʻo, ʻoiai ma nā moʻokūʻauhau aliʻi i ʻike ʻia ai, ʻo kekahi hapa paha o nā kauoha hoʻoilina aupuni, he makahiapo nō ua hoʻoilina. A i ʻole paha, he mea koʻikoʻi loa ia makahiapo i nā aupuni o kona wā. ʻO Kamehamehanui kekahi hiapo ʻai aupuni, ʻo Kalaninuiʻīamamao, a ʻo Liholiho kekahi (na Keōpūolani he makua). Pēlā pū paha ʻO Kaʻahumanu, ka hiapo a Keʻeaumoku kekahi aliʻi koʻikoʻi loa, ka mea nāna i hoʻonohonoho i nā aliʻi ʻōpio hoʻoilina a Kamehameha. A no laila, i loko o ka loaʻa a loaʻa ʻole paha o ke kapu moe iā lākou, ua ʻike ʻia nō he lauana o nā makahiapo aliʻi nui e lilo ana i mau mea koʻikoʻi no ke aupuni (Kamakau, helu 19, aa. 78, p. 7; Kamakau, helu 5:1, aa.14, p. 1,3; Malo, mok. 18 ,p. 13,15,18; Malo, mok. 35, p.1; ʻĪʻī, aa. 177, 274).

ʻO ke kapu moe, he mea koʻikoʻi ia iā Malo a he kumu nō ia o ka hoʻomau keiki ʻana. Me he mea lā, ua nui paha nā aliʻi ʻai aupuni i loaʻa ia kapu moe. ʻO Kīwalaʻō nō paha, ʻoiai ʻo kona makuahine ʻo Kalola, ua loaʻa nō ia kapu iā ia. ʻO Liholiho a me Kauikeaouli kekahi, maiā ko lāua makuahine ʻo Keōpūolani. ʻO Keakealaniwahine, ke aliʻi kapu moe o kona wā. ʻO Kahekili a me kona makuakāne, ʻo Kekaulike kekahi. ʻOiai naʻe ʻaʻole i loaʻa kēia kūlana akua iā Kamehameha, ua ʻimi ʻo ia i mau wāhine akua e paʻa ai kona aupuni (Kamakau, helu 17, aa. 69, p.6; Kamakau, helu 7, aa. 24, p.18; Kamakau, helu 2, aa.14, p.3; Kamakau, helu 2, aa.5, p.8;ʻĪʻī, aa. 92-94; ʻĪʻī aa. 30).

I mea paha ke kapu akua e hoʻokaʻawale ai nā aliʻi nui mai nā kaukau aliʻi. Ke hoʻomau ʻia ke kapu wela, he hoʻopaʻa i ke aupuni o kekahi aliʻi a me kāna mau keiki. He hoʻokiʻekiʻe i kona moʻokūʻauhau a hoʻokaʻawale mai nā kaukaualiʻi. Eia hou, he mea ia e keʻakeʻa ai iā haʻi e komo i ko ke aliʻi nui ʻohana kulana kiʻekiʻe. Weliweli ke aliʻi kapu i kona poʻe makaʻāinana no ka weliweli o kona kapu. Eia hoʻi, he mea nui ka mana i ka poʻe kahiko. Na wai lā e hoʻomana ai i ke akua i pono ka lāhui ke ʻole nā kapu aliʻi? Me ia mau manaʻo, ua hiki ke ʻike ʻia ka waiwai loa o lākou no ka pono o ka lāhui.

No laila, inā he maoli nō kēia manaʻo ʻo ke aliʻi nui kūpono loa, a makemake nui loa ʻia no ka ʻai aupuni ʻana, he kapu moe nō. Ua lilo nō ka hoʻonohonoho a hoʻopalau aliʻi ʻōpio, a me ka hoʻopālama ʻana i aliʻi ʻōpio, he koʻikoʻi i waena o ua mau lani nei. Ma kā ʻĪʻī hoʻi e ʻike ʻia ai kahi kākoʻo i ko Kaʻahumanu nuku loa ʻana i kāna mau kaikamāhine kapu i ka hōʻole ʻana o ke kauoha o ko lākou makuakāne, ʻo ia hoʻi ka hoʻāo ʻana i aliʻi nui o ke kapu. No ka mea hoʻi, e like me ka mea ma luna aʻe, ʻaʻole i makaʻu ʻo Kamehameha i ka hoʻāo i kāna mau kaikamāhine i aliʻi nui pupuka. ʻO ka mea nui,

'o ia ho'i ka ho'omau keiki ali'i. Pēlā pū ke ko'iko'i o ka ho'onohonoho a ho'opalau ali'i 'ana a hiki loa i ka wā o Kauikeaouli ma kā 'Ī'ī. Ua ho'onohonoho 'ia nā kia'i ma waho o kona hale i kona wā 'ōpio no kēia hanana. He 'elua paha kumu o kēlā, i pale kīmopō nō, a i hiki 'ole nō iā ia ke moe kolohe.

I ko Kamehameha wā 'ōpio nō, ua ho'opalau 'ia nō paha 'o ia. 'A'ohe o Malo palapala no ka ho'opalau 'ana o nā ali'i kapu wohi. Kainō, 'a'ole 'o lākou he 'ano ali'i ki'eki'e loa. Eia na'e kekahi mea hoihoi; ma ko 'Ī'ī mo'olelo no Kamehameha lāua 'o Kaleimāmahu ma Ka'ū, ua kū'ono'ono ko lāua nohona i ka wā wī i ka nui makana mai o nā wāhine iā lāua, he mau 'ōpio u'i. A laila, ua ho'oma'au 'ia lāua 'elua e ka makuakāne no ka moe pū 'ana me kāna wahine kapu e noho ana ma Ka'ū, 'o Kānekapolei. Kāhāhā! Pehea ho'i inā ua ho'omoe 'o Kānekapolei iā lāua 'elua i ka ho'omau keiki kūpono, i 'ole moe pono 'ole a 'ali ko lāua kapu i ke kaukauali'i? He kumu anei ia i kala 'ia ai lāua e ka makuakāne ma hope mai, 'oiai ua 'ike 'o ia i ka pono o ia hana i ka lāhui? Eia kā, hō'ike 'o Kamakau he keiki kā lākou (a pau e 'ōlelo 'ia nei ma luna a'e). 'O ka makahiapo ia na Kamehameha mai ia hana, 'o ia ho'i 'o Ka'ōleiokū ('Ī'ī, aa. 47; Kamakau, helu 39, aa. 187, p.15-18).

Hō'ike 'o Malo i kekahi mau lāli'i o kēia 'ano ho'omau keiki 'ana. A ho'opalau 'ia nā ali'i nui, he kāne a wahine pili loa koko 'ohana nō paha no ka moe nī'aupi'o, a laila ho'opili 'ia lāua ma kekahi hale i kūkulu 'ia no ia moe 'ana, he kapa ka inoa. Hana 'ia kēia mau mea a pau ma hope pono o ko ka wahine wā kahe koko, a me kona ho'oma'ema'e 'ana mai. A laila ho'okomo 'ia 'o ia i loko o ia kapa. Hele mai ke ali'i nui kāne, a komo i loko, a ho'onohonoho 'ia nā kia'i a puni ua hale kapa nei. Ua lawe pū 'ia nā kā'ai akua o ke ali'i kāne, a ho'onohonoho 'ia lākou a puni ka hale, a pēlā pū nā kāhuna e pule ana no kēia ho'omau keiki 'ana. Ke pō ke ao, ua pau. Ho'i lākou a pau. Wāwahi 'ia ka hale. (Malo mok. 35, p. 2-7).

Ma hope mai, ke hāpai ke ali'i nui wahine, ma laila nō ka wā e haku 'ia ai nā mele a me nā hula e ho'ohanohano ana i ke ali'i hou. Ho'oka'awale 'ia nō ho'i 'o ia mai ka makuakāne. A kokoke mai ka wā hānau, lawe 'ia mai nā pale keiki ali'i e kōkua ai i ka hānau 'ana. A ma ka wā ho'okohi, mōhai 'ia i nā akua i ho'ohānau mai i ke ali'i nui wahine. Lawe hou 'ia mai nā akua kā'ai o ke kāne a me ko ke kāne kahuna i ka wā hānau. Inā he ali'i nui wahine ua keiki nei, 'oki 'ia ka piko ma ka hale. Inā he ali'i nui kāne ke keiki, ua lawe 'ia i ka heiau i mea e 'oki aku ai ka piko. I ia wā ma ka heiau, e hīki'i 'ia ana ka piko i ka 'olonā. A laila, pule a'e ke kahuna i nā akua kā'ai, a mōhai ka makuakāne, a laila 'oki 'ia ka piko i ka 'ohe. Pau kēlā, pule hou no ke kūpenu 'ana o ke koko e kahe mai ana. A laila, pule ke ali'i nui kāne i nā akua, a pepehi a mōhai 'ia ka pua'a. Ho'iho'i 'ia ke keiki i ka hale, a 'imi 'ia he wahine kahu hānai nona (Malo, mok. 35, p.8-17, 19-22).

Wahi a Malo, ke pau ia mau hana, ua 'ae 'ia nō nā ali'i nui e moe me ke kanaka 'ē, he ali'i a kaukau ali'i paha. 'Ae 'ia kēia hana 'oiai, ua kō nō ia kuleana no ka lāhui. He hana wale nō kēia no ka ho'omau keiki nī'aupi'o o nā ali'i nui. Kāko'o ho'i 'o Kamakau i ia mana'o ma ka ka hō'ike 'ana mai, ke hana 'ia ka nī'aupi'o i waena o nā kaukauali'i a me nā maka'ainana, he hilahila a he 'a'e kapu nō ia (Malo, mok. 18, p.#18; Kamakau, helu).

Eia na'e, me he mea lā, ua 'ano noho pa'a kekahi o nā ali'i i ho'opalau 'ia a hānau he mau keiki i waena o lāua, e like ho'i me ko Kamehameha noho pa'a 'ana me nā wāhine 'o Keōpūolani, 'o Keapo'iwa, a me Kekaulike. A 'o kekahi po'e ali'i nui kāne, he mau ali'i 'ai aupuni ia, ua ho'ohanohano nō lākou i kā lākou mau wāhine. He nani ka 'ōlelo a Kamakau no ka mālama 'ana o Alapa'i, Kamehameha, a me Liholiho i mau 'aha 'aina no kā lākou mau wāhine (ma ka la'ana no Liholiho, ua mālama 'ia nō kāna mau wāhine kapu 'elima a pau). He hana politika paha ia, i mea e 'olu'olu mai ai kēia mau wāhine mana nui i ke kāko'o i ke ali'i 'ai aupuni, a i 'ole paha, he hō'ike wale i ka nui o ke aloha o ke ali'i 'ai aupuni i kāna mau wāhine. Pehea lā ho'i. 'O ka nani na'e, ka 'ike 'ana i ka loa'a paha o kekahi lauana i ma'a paha i waena o nā ali'i nui (Kamakau, helu 33, aa. 161, p.6; Kamakau, helu 60, aa. 259, p.14; Kamakau, aa. 11, p.6).

'O ka moe ipo malū, a moe ipo 'ao'ao nō ho'i, he 'ano moe ali'i nui 'oko'a nō ia. 'A'ole i ākāka loa nā loina a lula i pili i kēlā hana. 'O kā Malo, he koi 'ia aku ka ho'omau keiki ali'i nui, a kō ia hana, moe aku moe mai me nā kaukauali'i. Ma ka pōmaika'i ho'i, he mau la'ana i loa'a mai mai nā palapala a Kamakau lāua 'o 'Ī'ī mai. 'O kekahi mo'olelo i hō'ike 'ia i nā palapala 'elua, 'o ia ka moe kolohe a pe'e 'ana o ka wahine a Kalanimoku 'o Kūwahine, ke kaikuahine o Kanihonui, me Kuakini. Ua puhi 'ia nā hale a pau o O'ahu, mai ke alo ali'i aku i ka 'imi 'ana iā ia. A laila ua hō'ike 'ia. 'O ia J. A. Kuakini ho'okahi ka mea i 'o'opa iā Kūihelani no kona moe malū 'ana me kāna wahine 'o Ka'ō'ō. Ua 'ōlelo 'ia, ua maika'i a u'i kona kino ma mua o kēlā, a ma hope mai, he hiki 'ole nō ke holo ('Ī'ī, aa. 317; Kamakau, helu 37, aa.177-78, p.3).

'O kekahi la'ana 'ē a'e no nā kaukau ali'i, 'o ia nō ka moe malū 'ana o Sarai Hiwauli me Ha'alo'u. 'O ia ho'i ka wahine a John Papa 'Ī'ī, ka mea nō nona kekahi o nā puke i ho'ohana 'ia no kēia pepa. I ia manawa na'e ua ho'āo 'ia 'o ia me Kāhalai'a. A na kāna kāne lāua 'o Kōli'i i 'oki i ke po'o o ua Ha'alo'u nei no kona moe malū 'ana me Sarai. 'Ōlelo 'ia, 'o ka inu lama ke kumu o ia moe 'ana (Kamakau, aa. 258, p.11).

Eia kekahi la'ana no nā ali'i nui 'ai moku; 'O Kahahana, he ali'i nui kāne u'i loa ia o kona wā. Hānau 'ia 'o ia me ke kapu ki'eki'e loa i hiki ai iā ia ke lilo 'o ia ka mō'ī o O'ahu. Ua 'ali 'ia na'e ia kapu, a pau kona hahana ma muli ho'i o kona puni i ka moe pū 'ana me nā kaukauali'i. Mali'a paha, 'a'ole 'o ia i ho'omau keiki ma mua o kona wā noa no ka 'imi le'ale'a, a pēlā i pau ai ia wela. 'A'ohe keiki ali'i kapu i loa'a mai iā ia (Kamakau, helu 19, aa. 79, p.14).

'O ka mō'ī ho'i o ka pae 'āina, 'o Kamehameha Pai'ea, ua palapala 'ia he mo'olelo i pili iā ia e 'Ī'ī no kona moe malū 'ana me kekahi kaukauali'i o ka papa ali'i o Luluka. iā I kona hele 'ana i ka "ho'omana i ke akua." Ua 'ike 'o Ka'ahumanu lāua 'o Kaheiheimālia i kona hana 'i'o. A ho'i mai 'o ia, ua nui kona ho'ohilahila 'ia i ke mele a me ka hula a lāua, no ka lili paha a lāua. ('Ī'ī, aa. 145-46).

Kaulana ho'i ka moe kolohe 'ana o Ka'ahumanu me Kanihonui i ko ke ali'i wahine wā kapu loa. No ka inu lama ke kumu o kā lāua hana, a no kēia mea, ua mōhai 'ia nō 'o Kanihonui e Kamehameha. Nui 'ino ka lu'ulu'u o ke ali'i wahine. A 'o Kānekapolei, ka wahine kapu a Kalani'ōpu'u, ua moe malū nō me Kamehameha kekahi, ua ho'oma'au 'ia 'o ia no ia hana 'A'ole na'e i like ka nui o ka 'o'ole'a 'ana a Kalani'ōpu'u, he hainā paha ka Kamehameha.(Kamakau, aa. 172, p.14-16).

No laila, 'o ka lauana nui mai nā la'ana o kēia mau mea kākau, he hopena 'ino nō ka moe malū ipo 'ana. Eia na'e, kūpono ke ho'omana'o 'ia ke 'ano o lāua. He mau Kalikiano ikaika loa nā mea 'elua i ka wā i kākau iho ai i nā mo'olelo Hawai'i. No laila he kālele paha ma na la'ana e ho'olale ana i ka po'e e alo a'e mai ua 'ano hana nei. 'O kekahi o kēia mau la'ana, ua hana 'ia ka 'a'e kapu 'ana, a pēlā ho'i i loa'a mai ka hopena 'ino. A 'o Kahahana, 'a'ole 'o ia i hahai i ke ala pono o ke ali'i nui e like me kā Malo. 'O nā la'ana na'e me Kūakini, he mau la'ana maika'i na'e ia no ka hō'ike 'ana he kūpono paha ka 'ae 'ana aku o kekahi ipo i ka mea a'e e moe me ha'i o komo nui ka lili. He lili nō ho'i ko Kāhalai'a iā Ha'alo'u i kona moe 'ona 'ana me Sarai Hiwauli. 'O ka lili paha ke kumu, a i 'ole paha, 'a'ole i hahai maika'i kēia mau kānaka i nā loina maika'i o ka hana moe malū 'ana. A i 'ole paha, 'a'ole moe wale aku a moe mai paha nā ali'i e like me ka makemake o lākou i ka wā kahiko o komo ka lili. Inā paha ua maika'i ka hana a Kamehameha me ua Luluka nei, 'a'ole paha 'o ia i hūnā.

A no laila, 'ō'ili maila he kūkohu o nā lula o ka moe ali'i 'ana:

1. Inā he ali'i kapu moe i hānau 'ia mai, a noho paha, e ho'opalau 'ia ia ali'i no ka ho'omau kapu 'ana. 'A'ole mōakāka inā pēlā pū no ka po'e kapu wohi.
2. He ko'iko'i loa ka ho'omau keiki 'ana i pa'a ka hanauna ali'i akua hou, i pono ka lāhui. 'O ia hiapo nō paha ka mea e lilo i ali'i 'ai aupuni, a 'o ia ka mea e ili nō paha ke kapu ma luna ona.
3. 'O nā keiki ali'i i ho'opalau 'ia, 'a'ohe o lākou koho i ka hana. He 'ōpio nō i kekahi manawa, a inā 'a'ole ho'opalau 'ia i hoa hānau, e ho'omoe 'ia nō paha me kekahi ali'i mana nui i 'oi loa aku ka o'o. He hana politika paha ia.
4. Ma hope o ka ho'omau keiki 'ana, ua 'ano pau ke kapu o ka moe 'ana. E 'ae 'ia ana nō ka moe 'ana me kahi kanaka a'e, he ali'i a kaukau ali'i paha.
5. I kekahi manawa, komo na'e ka lili a i 'ole paha ho'okapu 'ia ka ipo o ke ali'i nui, a he kūpono 'ole ka moe aku a moe mai.
6. 'O ka moe 'ana o nā ali'i, he mea ia e ho'oki'eki'e ai i ka mana o kahi ali'i, a me ka papa ali'i mai kona wā aku.

'O ia ho'i nā lula o ka moe ali'i mana mai nā mana'o o Malo, Kamakau, a me 'Ī'ī.

He pilikia na'e paha 'o Kahekili i ko Malo kohu mana'o 'ana, 'o ka makahiapo wale nō ke keiki ali'i e loa'a mai ke kapu o ka makua. Ma kā Kamakau kākau 'ana, he ho'oilina aupuni nō ia no Kamehamehanui i kona hala 'ana. He kaikaina ho'i ia nona i like nā mākua o lāua, 'o Keku'iapoiwa lāua 'o Kekaulike. 'O ka makahiapo nō 'o Kamehamehanui na lāua. Eia ho'i hō'oia 'o Kamakau, he ali'i kapu nō 'o Kahekili, 'oiai ua helu pū 'ia he ali'i kapu o Maui me Kalola, Kekaulike, a me Kamehamehanui. Inā paha he kapu moe a i 'ole he kapu noho wale nō, 'a'ole i mōakāka. 'O ke kuhi wale nō i loa'a, he kapu ia ma luna o ke kapu wohi, 'oiai ua ho'opa'apa'a 'o Kahekili me Vanekouva no ka nui o kona kapu ma mua o ko Kamehameha. He moe paha, a nō laila he pilikia paha kēia e kū'ē'ē 'ana a e hō'ole ana i kā Malo wehewehena, inā ua like nō ko lāua 'o Kamehamehanui mau mākua 'elua. Pehea ka hiki ke ho'oili 'ia ke aupuni iā Kahekili, he kaikaina wale, i loko nō o ka loa'a o nā keiki kapu ki'eki'e i ka mō'ī 'o Kamehamehanui? (Kamakau, helu 5:1, aa. 14, p3; Kamakau, helu 5:II, aa. 17, p.26; Kamakau, helu 28, aa. 139-40, p.3).- kūmole

Eia hou kekahi mo'olelo no Ka'ōleiōkū (Paulika'ōleikū) ke keiki makahiapo a Kamehameha lāua 'o ko Kalani'ōpu'u wahine kapu (kapu moe) 'o Kānekapolei. Ma kā 'Ī'ī wehewehena, 'a'ole kā na'e i helu 'ia 'o ia he keiki na Kamehameha. E no'ono'o 'ia ana he ho'oilina mō'ī paha no Kamehameha i ka wā i 'ane make 'o ia ma mua pono o ka ma'i 'ōku'u, 'o ka makahiki 1804 paha ia (ma mua nō o ke ku'ikahi me Kaua'i i ka makahiki 1810). Ua hala na'e 'o Ka'ōleiokū, kāna makahiapo, ke keiki ho'i a ke ali'i nui kapu moe 'o Kānekapolei, a wahi a Malo, e 'oi aku ka mana'o 'ia 'ana e lilo paha ia i ho'oilina aupuni, ma ka makahiki 1816. He kuhina ho'i ia no kona makuakāne. No ke aha lā kona ho'opoina wale 'ia? 'A'ole i mōakāka ka hapanui o ke kū'auhau ali'i a pilina 'ohana o Kamehameha a me Kānekapolei i kēia mea kākau, akā kainō he keiki makahiapo 'ano ki'eki'e nō paha kā lāua ('Ī'ī, aa. 266; 'Ī'ī, aa. 186-187; 'Ī'ī, aa. 30; Kamakau, helu 39, aa. 187-188, p.12, 15-17; Kamakau helu 5:11, aa 17, p.26; Kamakau, helu 1, aa. 3, p.44; Malo mok. 18, p.18; Malo mok. 35, p.1).

No laila, mai ia mau la'ana 'ekolu, he māhu'i no ka 'ole paha 'o ka makahiapo wale nō ka mea e hiki ai ke ili mai ke kapu ki'eki'e i luna ona, a i kekahi manawa nō ho'i, 'a'ole hā'awi 'ia he kapu ki'eki'e loa ma luna. 'O Liholiho a me Kauikeaouli kekahi, ua loa'a he kapu moe iā lāua maiā Keōpūolani, a he kapu noho paha no ka mea,

he moe ho'i paha kā Kamehameha me ke kaikamahine a kona kaikua'ana, 'o Kīwala'ō. A he 'elua mau lani lāua na nā mākua ho'okahi, e like nō me Kamehamehanui a me Kahekili. Mali'a paha, ke hā'awi 'ia ke kapu ki'eki'e i ke keiki o kekahi ho'opalau 'ana, ua hiki ke hā'awi 'ia he mau manawa inā moe hou ia mau ali'i nui 'elua kekahi me kekahi. A inā me kekahi ali'i nui a'e ka hana, 'a'ole i hiki ke hā'awi 'ia i ke keiki ke kapu o ka makua i moe 'ē me ha'i.

Malia ho'i paha, ho'oili 'ia ke kapu moe a wohi ma ka mana'o o nā mākua, a ma ke 'ano o ka moe 'ana. He hapa wale nō paha ka 'ike i hō'ike 'ia mai e Malo mā. 'O ke kapu noho, he pili wale paha i ke 'ano o ka hānau 'ia 'ana o ke keiki. Me he mea lā, 'a'ole i like ke ko'iko'i o ka ha'i 'ana i ka po'e i lako i ia kapu i ka mana'o o nā mea palapala. 'O ka ha'i 'ana iā wai ke kapu moe ke ko'iko'i, 'oiai e pono paha ana e ho'oholo 'ia ka hā'awi 'ana aku i ia kapu iā ha'i. Eia kekahi mana'o, he pili paha ia ho'oholo 'ana i ka hā'awi i kapu wela i kahi i mea e koho 'ia ai ka hānau keiki 'ana? No ka mea, he nui ka ho'opuka 'ia 'ana o ko Kamehameha makemake 'ana (a me nā ali'i 'ē a'e no kā lākou mau keiki iho) e hānau 'ia 'o Liholiho ma Kūkaniloko i loa'a ke kapu wela iā ia. 'A'ole na'e i kō. He pili paha i ke kapu moe? A i 'ole paha he 'oko'a ia kapu wela mai ke kapu moe, he anu'u hou a'e paha ia? A eia he mana'o hope, malia nō he keu ka li'ili'i wale o ka 'ike no ke kapu wohi 'oiai ia kapu e ola mau ana i waena o nā ali'i nui o ko kēia mau mea kākau wā; he mālama nō i ke kapu ola. He nui nā nīnau o nā pāha'oha'o o ke au i hala.

He aha nō ho'i ke ko'iko'i maoli o ke kapu a me ke 'ano o ka ili 'ana o ua mea nei ma nā hanauna ali'i nui o ka wā kahiko? 'A'ohe paha mea e hō'ole i ka mea nui o ka moe 'ana o nā ali'i, akā i loko nō o ia a me ke ko'iko'i loa o nā kapu i nā Hawai'i a pau o kikilo, he hunahuna wale nō ke koena a kākou e helu wale nei. He 'oia'i'o nō na'e ka mana'o he hana ia e lu'ulu'u ai nā ali'i nui i ola ke aupuni o lākou, a ke nānā 'ia, e like ho'i me kā Kahahana, na ke aupuni nō ka lilo. Ma ka maopopo 'ana aku i nā kapu ali'i a akua ho'i paha, e maopopo auane'i kākou i ko kākou mō'aukala, a me ke kuana'ike Hawai'i ku'una e mae nei i waena o nā kai 'ewalu o kēia pae 'āina. Nui nā mea e koe nei i hiki ke 'ōlelo 'ia no kēia kumuhana. Ua 'oi loa aku ho'i nā nīnau. 'A'ole loa 'o kēia he noi'i piha pono no kēia kumuhana, a he hō'ole 'ia nō paha kekahi o nā mana'o i hāpai 'ia nei i ka na'auao 'ālohilohi mai mai ke kūmole 'ē. Akā e la'a nō me ka 'ōlelo hope i ho'okani 'ia i ke mele kaulana a Kainani Kahaunaele, 'o *Ke Aloha No Waipi'o*, "Ua hala nā kūpuna, a he 'ike kōli'uli'u wale no ko kēia lā, nā mea i ke au i hope nei. 'Io ke kilo. E ala mai. E kū ha'aha'a."

**He Papa Kūmole**

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# Tsar Alexander II and President Abraham Lincoln: Unlikely Bedfellows?

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In the past one hundred and fifty years, the earnest allegiance between Russia and America changed to that of vitriol and aggression, and then settled into a sort of uneasy middle ground in the post-Cold War era. The identification of Russia, formerly the Soviet Union, as an enemy and the 'other,' has taken root in successive generations since the 1917 Russian Revolution. Many Americans would find it hard to conceive of having much in common with the communists of the Cold War—and would find it harder still to comprehend peaceful, nay friendly, relations between the two countries. In fact, Russian-American relations were never better than during the latter half of the nineteenth century, the zenith of which was during the period of the American Civil War. The friendly and mutually beneficial relationship that emerged during the latter half of the nineteenth century between the seemingly opposed autocratic Tsarist Russia and the democratic United States had its roots in the shared problems of emancipation of a servile class, increasing domestic unrest, and a shared adversary in Great Britain. For Russia, devoid of friendly relations with the entire family of European nations, this alliance was a welcome relief, needed after the humiliating losses suffered in the Crimean War of 1853-1856. America meanwhile gained an ally in the fight to stop English and French intervention in the American Civil War on the side of the Confederacy and benefited from increased trade relations in the Western Hemisphere. The political and diplomatic relationship between the two countries was not altruistic—it served the security and economic needs of both countries at the time with little regard to other concerns such as human rights, but it was genuine and marked with feelings of goodwill and hope, especially during the Civil War.

Both Tsarist Russia and the United States of America (U.S.) were at the core defined by their opposing systems of governance and the reliance on their separate, but comparable, institutions of bondage. The unique placement of Russia straddling the two continents of Europe and Asia among the other nations of Europe gave Russia somewhat of an identity crisis—considered barbaric and second rate, early Russia resembled little of the great kingdoms of Europe in the fifteenth and sixteenth centuries. In the early seventeenth century, Tsar Peter the Great attempted to 'modernize' Russia, importing skilled European statesmen, builders, military officers, and others to give Russia a European makeover, while simultaneously imposing a Western calendar, styles of dress, and language. By the end of his reign in 1721 many in the Russian court spoke French, wore the latest European (French) fashions, and lived in his new capital, St. Petersburg. The concept of autocracy was, in the words of Russia historian Michel Beran, "the most opulent and at the same time the most naked form of power."[1] All of this was built on the feudal system of serfdom, wherein serfs, both state and private, were bound to the land (or to the government in the case of state serfs) and forced to toil to support the landowner.

The majority of the serfs were private; the Russian state under Peter the Great was small and controlled only 10 percent of the total serf population.[2] Serfs were largely uneducated, rarely left the village of their birth, and much of their life was steeped in the mysticism of the Russian Orthodox Church. Serfs largely thought of themselves as the obedient children of the batushka [little father] of the Tsar and to a lesser extent their landowning masters.[3] The landed, and consequently serf-owning, gentry thought that this situation was beneficial for all parties—Russia lay primarily in the sub-Arctic climate zone with long, dark winters and a short growing season in the summertime; serf labor thus needed to be mobilized to take advantage of the limited productivity of the land, and the owners believed that the uneducated, superstitious peasants would not be able to manage their own labor efficiently. However, a distinction must be made between Russian serfdom and American slavery—landowners owned the absolute labor of the serf, but not the serf themselves. Russian landowners were to provide all the necessities for their serfs, but after 1721, landowners were not allowed to sell serfs publicly, although they could be traded between landowners and collected in place of debt owed.[4] This unfree state of labor hampered the Russian economy for 150 years after the reforms of Tsar Peter I. For example, Russia did not possess a landless middle class to harness for colonization or industrialization, in stark contrast to

her European neighbors. But for the largest landowners, who consequently owned the majority of serfs, the importation of European ways brought a new reliance on the fruits of serf labor that would prove hard to part with when the time for emancipation finally came in 1861. For slave-owners in the United States, this reluctance to part with a system of exploitative labor would be just as difficult.

America, like Russia, was born out of conflict with a distant empirical power. In place of the Mongols, America witnessed a bloody revolution and separation from England. The American economy depended on the labor of millions of enslaved Africans and much of the acrimonious debate in the nineteenth century was rooted in the problem of slavery—notably whether slavery should be extended into the territories or confined to the southern states. The colonies of the Carolinas, Georgia, Florida, Mississippi and Alabama are known as the "Deep South," and this was where slavery became a vital institution thus becoming the impetus for secession during the Civil War. In South Carolina alone, slaves made up sixty percent of the population. Many of these slaves were owned by large plantation owners who saw themselves as the American version of European aristocracy. This romantic nationalism, the "right of certain (superior) people to impose their will on other (inferior) peoples," was common for landowners in both the American South and Russia.[5] Wealthy and powerful, much of American planter wealth came from the cotton or rice grown on the large plantations, and although a minority among the white population in the south, the planters nevertheless managed to dominate politics in the region. Planters informally promulgated a theory of racism that appealed to the majority of the white population, focusing on the white status in society as belonging to the better race by defining the worth of a person by the color of their skin. No matter how poor or destitute, a white man was a step above the enslaved African, and this instilled a sense of racist pride that permeated Sothern society. However, in the Deep South, the specter of slave revolt or rebellion was a very real possibility in areas where slaves outnumbered whites, and this racism helped bind the slave-owner and the free white together to keep slaves in bondage.

Slavery in America caused political and moral problems for some, but it was an economic institution that both the North and South benefited from. The South produced cotton and other raw materials which were processed in the North or exported to other countries, the lowered economic costs of slave labor kept the raw goods and the manufactured products competitive in local and world markets. The political problems caused by slavery arose from the basis of American government in representative democracy. Many in the largely free North opposed the slave system, but for different reasons. Anti-slavery activists saw it as a dying institution that was morally opposed to the principles of the American system of 'life, liberty, and the pursuit of happiness.' Adding credence to this view was the somewhat embarrassing fact that most of the nations of Europe (excluding Russia) had abandoned the institutions of serfdom and Slavery by the start of the Civil War.[6] Many American politicians were opposed to the conservativism embodied in the slave system—politicians from slave states were often opposed to internal improvements and tariffs, two vital elements that drove the manufacturing economy of the north. Internal improvements by the federal government usually benefitted the industrialized North, not the largely agrarian slave states. Tariffs on imported goods often had reciprocal effects on goods exported such as cotton, making the main export of the South more expensive and less competitive abroad. Much of the post-American Revolution political wrangling was over how to reconcile the opposing viewpoints of the free and slave states. For a time this wound in American democracy was bandaged over with legislation such as the Missouri Compromise which drew a line at the 36° 30° parallel of the 1803 Louisiana Purchase, permitting slavery below the line and forbidding its existence above. Later, the principle of "popular sovereignty" from Illinois Senator Stephen Douglass stated that the people of the new Kansas and Nebraska territories could choose whether they wished to be slave or Free states.[7] However, both of these bandages did little to heal the festering germ that was the cause of the infection—slavery. Some in the North were opposed to slavery on moral grounds.

Opposition to slavery took many forms, some wanted to abolish it immediately, others wanted gradual emancipation, and another segment wished to colonize the slaves outside of America to avoid race riots, but one thing that united all opponents of slavery was the wish to curb the political power of the South and limit the spread of slavery to the territories. The failure of "popular sovereignty" in the new territories was exemplified in 1859 by 'Bloody Kansas' where both opponents and proponents of slavery rushed to form a government there that would test the idea. The end result was widespread violence and the eventual formation of a pro-slavery government that convinced many politicians in the North to call for justice in Kansas. Called 'radical' by their opponents in the South, these men, mostly Republicans, embraced that moniker and Abraham Lincoln for the presidency in 1860. Of poor background and a self-educated lawyer practicing in Illinois, Lincoln was a polarizing candidate in the election of 1860, and came into office facing deep divisions in American politics and society.

Pre-Civil War relations between Tsarist Russia and democratic America were fraught with contradictions. In Russia, almost every Tsar faced revolt that was put down with brutal military suppression common to autocratic regimes.[8] In this light, the Russians could have viewed the rebellion of the American colonies as a threat to established order, and they would have, had it not been targeted at Russia's most vociferous adversary, Great Britain. For much of the nineteenth century, most

of Europe saw the United States as the "world's most dangerous and extremist revolutionary government," and in the early years of the republic treated American dignitaries and merchant fleets as the emissaries of a second rate power.[9] The Russian government took a similar stance towards America, but due to America's constant tensions with Great Britain, the officials in St. Petersburg were cognizant of the benefits of a possible alliance with America. Speaking of the growing Russian-American economic relations and the strategic alliance against the British, Tsar Nicholas I commented sometime during 1837-1839 that "Not only are our interests alike, but, our enemies are the same."[10] Russian contacts with Americans increased during the 1840's and 1850's as America "acquired" the Mexican territory of California and the Russians were buoyed by increasing American-British conflict over the Oregon and Washington territories.

However, not all Americans were supportive of Russia in this era. Russia's reactionary stance to the revolutions throughout Europe in 1848, especially their attitude toward the attempts at Hungarian independence from Austria, culminated in the "Kossuth craze." The "Kossuth craze"[11] began over the succession attempt of Hungary under the leadership of Governor Louis Kossuth from the Austrian Empire. Kossuth pleaded, to no avail, with various countries in Europe and America for help to stave off what turned out to be a brutal Russian intervention in favor of Austria to crush the Hungarian succession. Many in the U.S. protested this foreign interference by Russia in Austrian affairs, and an early leader in the anti-Russian protests in support of Governor Kossuth was a somewhat obscure lawyer from Illinois, Abraham Lincoln. Kossuth supporters were influenced by the thousands of Hungarians that immigrated to the United States in the aftermath of the Russian crackdown, and motivated by a general sense of concern and condemnation for Russia's repressive measures. On September 6, 1849 in Springfield, Illinois, Lincoln was appointed with five other citizens to draft resolutions condemning the Russian action to the U.S. Secretary of State.[12] Stephen Douglas, later in 1858 to be Lincoln's political opponent in the race for the Illinois senate, gave an eloquent speech in Washington D.C. in support of Kossuth

> Shall it be said that democratic America is not to be permitted to grant a hearty welcome to an exile who has become the representative of liberal principles throughout the world lest despotic Austria and Russia shall be offended? The armed intervention of Russia to deprive Hungary of her constitutional rights, was such as violation of the laws of nations as authorized.[13]

According to Woldman, a lawyer and Lincoln historian, and several other authors on the subject, Lincoln saw Russia as the "exemplar of repressive despotism," and that he "hated slavery in any form."[14] Lincoln would eventually change his attitude on the former; his stance on the latter is still under debate by many historians.

During this second demonstration Lincoln was again tasked with sitting on a committee with six other prominent Illinoisans to draft resolutions expressing the sentiments of the demonstrators. These resolutions are a microcosm of the confusing and contradictory nature of politics, and show the depth of Lincoln's vacillation on issues of non-interference and succession that would prove to be an object of intense scrutiny by later historians. Of note among these resolutions was the first, stating that "it is the right of any people, sufficiently numerous for national independence, to throw off, to revolutionize, their existing form of government, and to establish such other in its stead as they may choose."[15] Congruent to this was a speech that he gave before Congress in 1848:

> Any people anywhere, being inclined and having the power, have the right to rise up and shake off the existing government, and form a new one that suits them better. That is a most valuable, a most sacred right—a right which we hope and believe is to liberate the world. Nor is the right confined to cases in which the whole people of an existing government may choose to exercise it. Any portion of such people that can, may revolutionize and make their own so much of the territory as they inhabit.[16]

This was a popular belief in America at the time Lincoln voiced it, yet by 1860 it would not be shared by many in the North, including Lincoln himself. The second resolution, "that it is the duty of our government to neither foment, nor assist, such revolutions in other governments," was an issue that Lincoln would not change his mind on during the time period up to and through the Civil War.[17] Lincoln's duplicity can be explained by the changing political situation of America, and his disagreement of Russian actions was confined to that country's interference in what was an internal revolution in Austria. This principle of non-interference would become the backbone of Union efforts to stop European recognition of the Confederacy, and have important international implications as the Union, by nature of the non-interference principle but in violation of the earlier support for secession, refused multiple calls to intervene in the Russian suppression of internal Polish revolt in 1863. Nevertheless, despite the resolutions of outraged Illinoisans, Russia and America continued during the decade of the 1850's to have a warm and growing international friendship.

While Russian-American commercial contacts continued to prosper during the 1850's, it was the Crimean War, fought between 1853-1856, that cemented the alliance between the two powers against England and France and forced Russia to directly confront the economic backwardness of serfdom. The war arose over

tensions between Russia and the Ottoman Empire over Russian efforts to secure rights for its Orthodox Christian subjects living in modern-day Turkey. Initial Russian successes over the Ottomans in the Black Sea areas soon reversed as Britain and France entered the war on the side of the Ottomans, fearing growing Russian influence in the region and perceiving that Russian aggression could force the weak Ottoman Empire to collapse. The British effectively blockaded the Russian Fleet in the Baltic Sea, preventing them from supporting the much smaller Black Sea fleet. Russia suffered a complete destruction of its Black Sea naval forces, mostly at the hands of the Russians as the decision was made to scuttle most of the ships at the Bosporus Straight to prevent entry to the Black Sea.[18] Russia also suffered defeat on land; although it possessed more men than Britain and France, as well as the defensive advantage, Britain and France were industrialized societies and as such they benefited from higher quality arms, troops, and transport. The Russians by comparison lacked effective transport of both men and materials; many of the weapons used were holdovers from the Napoleonic Wars of fifty years earlier, and Russia's nascent industrial capacity was overwhelmed by the war demands.

While the American president Franklin Pierce, and his Secretary of War Jefferson Davis, wished to remain neutral during the Crimean War, private Americans citizens found many different ways to show support for Russia during the war. When the British and French blockaded the coast of Russian America during the war, the Russians hired American merchants to both conduct economic and governmental business, under the protection of the neutral American flag. While America had much more in common with the British ideologically and politically than with Russia, Americans viewed the Russians as "another great victim of British imperialism" during the 1850's, lending towards the overall feeling of sympathy and support for Russia.[19] This dislike of Britain stretched far back into the beginnings of American history due to repeated conflicts after independence such as the War of 1812 and British opposition to the Monroe Doctrine. This dislike had not abated by 1853, as any war that Britain was in during the nineteenth century "found the Americans cheering for the other side."[20] Most did not expect America to enter the Crimean War on either side, but the Americans gave much needed aid to the Russians.

The United States demanded neutral shipping so they could supply both belligerents. However, Russia suffered through a joint British-French blockade in the Crimea and the Americans wanted access through it to sell arms and trade with the Russians.[21] Ironically less than ten years later the Union would soon be demanding that Britain and France respect efforts of the Union to blockade the Confederacy during the Civil War. While the Americans did supply goods to both sides during the Crimean War, the majority of them went to the Russians, and England gave in to the Americans on almost every issue involving the blockade.[22] The Russian Chargé d'Affaires at Washington, Edouard de Stoeckl, was instrumental in building the formal relationship between Russia and America that served each country so well during the 1850's and 1860's. He skillfully and actively sought American support for Russia during the Crimean War. In a letter to the Tsar written sometime in 1854, Stoeckl remarked that

> The Americans will go after anything that has enough money in it. They have the ships, they have the men, and they have the daring spirit. The blockading fleet will think twice before firing on the Stars and Stripes. When America was weak she refused to submit to England, and now that she is strong she is much less likely to do so.[23]

The assistance to Russia was mainly trade-based, giving the Russians access to modern weapons and materials that they could not produce in mass quantities.

Both Tsars Nicholas I and Alexander II were thankful for American support during the Crimean War and extended several overtures of friendship both during and after the war to the United States. The most significant exchange was the Russian invitation to American businessmen to invest and do business in northern Manchuria and Sakhalin Island, two markets that the Americans were seeking to enter from the period they came into Russian possession earlier in the nineteenth century. During the Civil War, Russia allowed the American company Western Union to build a telegraph line through Russian America and Siberia instead of the undersea route in the Atlantic that proved to be more difficult and expensive than originally planned. Nevertheless, these cooperative commercial and political efforts pale in comparison to Russian and American attempts to solve the internal instability and economic damage caused by serfdom and slavery.

The defeat of the Russians in the Crimea cannot be overstated in its effect on Alexander II, who took over as Tsar in 1855 after the death of his father. Alexander II was considered an "enlightened sovereign."[24] Educated by the leading intellectuals of Russia, Alexander read and spoke four languages and had training in history, science, philosophy, and other elements of a well-rounded aristocratic education by nineteenth century standards. The Tsars, and some aristocrats before Alexander II, recognized the fallibility of the serfdom system yet feared the social upheaval and unpopularity of making changes to what was the foundation of Russian society; the same fear was expressed by many in the American government that recognized the problems of slavery, yet were afraid of the furor and instability its removal would cause. Both systems of serfdom and slavery had their proponents who espoused the benefits of the systems in romantic and paternalistic terms— that those at the bottom of the system were better off with a compassionate father figure to look over them. In Russia, this very system was

a cancer on the health of the economy: although Russia had the largest population and landmass in Europe, Russian grain yields were among the lowest in Europe.[25] Over eighty percent of the population was virtually enslaved under the system of serfdom by the Crimean War and agitation for revolt was a common occurrence in Russia.[26] For example, in the thirty year reign of Nicholas I, 556 serious serf revolts broke out, an average of just above eighteen a year.[27] Alexander II knew that he must liberate the serfs.

Alexander II understood that reform must come from his will alone: previous Tsar's going back as far as Catherine the Great in the 1780's had attempted to discuss serf reform or emancipation, but the aristocracy that owned the surfs declined to participate in any kind of reform to the system. Alexander II's effort would be a revolution from above, made possible by the power of Autocracy. Alexander II emancipated the serfs held under the crown in February 1860 with little opposition, granting them the same freedoms as other rural freemen, namely the right to purchase land, enter into private contracts, and set up local governing bodies. Alexander set up a commission of nobles to study the problem of emancipation of privately held serfs and they came back with what he already knew: that emancipation would have to be forced by the Tsar and that it would be unpopular with the aristocracy. Embodying this opposition was Prince Alexis Orlov, one of the most powerful men in Russia and a large landowner. Sympathy for the aristocracy was not confined to Russia, many in America, especially in the South, identified with the system of serfdom, and consequently this played a large role in the support for Russia during the Crimean War.[28] Orlov believed that emancipation would impoverish the serfs and cause anarchy by removing the protective landowner who directed their labor, believing, along with many other nobles, that the serfs possessed intellects no brighter than simple beasts.[29] It was Orlov who, by his power obtained a seat on the emancipation committee, imparted a conservative tone on the eventual manifesto.

Promulgated in March 3, 1861, the Emancipation Manifesto 'liberated' the private serfs.[30] Technically declared free of bondage, the serfs had to reimburse both the former owners of the land and the government over a period of thirty years. The government stated that it would partially reimburse the nobles, yet in practice this rarely happened due to the poor finances of the Russian government. There was little disturbance with the former serfs at first, as many peasants could not believe that the "little father" (the Tsar) would not grant them full title to the land that they felt was theirs after countless generations of labor, and instead waited for what they considered to be the "true" emancipation.[31] The nobles were unhappy with the manifesto as well: most landowners were already heavy in debt or accustomed to luxuries, and now they lost both their serfs and a portion of their property, and received little of the promised compensation. To complete the dissatisfaction with the manifesto, the government experienced a major decrease of revenues as grain yields and manufacturing started to decline due to the instability caused by the shock to the economy from emancipation. Internal revolt continued to increase rather than decrease, and adding to the woes of Russia was a Polish uprising and the internal strife of Russia's greatest ally, America. Alexander II knew that the Emancipation Manifesto had to be issued to set free the backward agrarian economy of Russia to prepare for industrialization and capitalism, yet the effects of doing away with a system of bondage that affected over eighty percent of the population was disastrous for the short-term stability and economic health of Russia. The heavy-handed autocracy that issued the manifesto was able to control the instability on the surface, yet autocracy "does not eliminate opposition, it drives it underground…and [it] becomes explosive."[32] The Manifesto was a step in the direction of other European powers, and was even ahead of America, where in that country, and even all over the world, those eyes hoping for the abolition or extension of slavery were watching with rapt gaze. The Friend, a whaling and abolitionist newspaper published in Honolulu, Republic of Hawai'i, had this to say about the Russian Emancipation in the May 2, 1861 issue:

> It is the high privilege of the now living generation to see what so many noble men of past ages have in vain longed and toiled for—the beginning of the total abolition of human bondage. While in the New World the most wicked form of slavery the world has ever seen has been quite unexpectedly shaken to its foundation by the mad schemes of men who intended to make it the corner-stone [sic] of a new government and the starting point of a new era of civilization, a monarch of Europe is fast clearing away the last remnants of a milder kind of involuntary servitude in the Old World.

While the author of this editorial and the publisher of The Friend were both American, their comparison of serfdom to American slavery and general attitude toward slavery were both shared and vilified by their countrymen in America.

Slavery caused the American Civil War—it was the arguments over whether slavery should and could be extended to the territories, or even exist in the states at all that drove the growing tensions between the largely industrialized North and the agrarian and rural South. It is no surprise then that those caught up in the debate over slavery, including Lincoln himself, were watching the emancipation in Russia unfold. Russia was on Lincoln's mind, in a different way, when in 1858 he stated that if slavery was allowed to continue to spread in the U.S. that he would "prefer emigrating to some country where they make no pretence of loving liberty—to Russia, for instance, where despotism can be taken pure, and without the base alloy of hypocrisy."[33] In 1860, President Buchanan, in a message to congress, stated that the

people of the North had no more right to interfere with the institution of slavery in the South than with the serf question in Russia, drawing a comparison between the two systems of bondage.[34] Others in America, like the political agitator Thomas Dorr, worried more about the growing power of the federal government. More specifically, he feared that that the efforts to contain and control the new areas would result into the American republic turning into a "vigorous, centralized state, with the center uniting in itself the powers of the Federal and the State Governments."[35] Dorr drew a direct correlation between Russian expansion and governmental instability and despotism, and feared that this centralization of power, not slavery, would dissolve the United States. Dorr's prediction was correct in some ways: during and after the Civil War the power and responsibilities of the Federal government grew to levels unimaginable before the war.

The southern states felt that the extension of slavery was crucial for their political, economic, and cultural existence, and that the new Republican party, headed by Lincoln, would do away with the very institution that furnished their identity. Certainly Lincoln was no friend of slavery and considered it to be detrimental to the principles of the United States.[36] Lincoln thought that the "two great ideas" of slavery and freedom "had been kept apart only by the most artful means"—here he was referring to the various compromises meant to preserve slavery and postpone what he felt was its eventual abolition.[37] Yet he was no friend of Negro equality; in 1858, Lincoln is quoted as saying:

> I am not, nor have ever been in favor of bringing about in any way the social and political equality of the white and black races—that I am not nor ever have been in favor of making voters or jurors of negroes, nor of qualifying them to hold office, nor to intermarry with white people; and I will say in addition to this that there is a physical difference between the races which I believe will ever forbid the two races living together on terms of social and political equality.[38]

So why then, just five years later, did Lincoln draft and sign a proclamation to free all of the estimated four million slaves in the then seceded states, knowing the social, economic, and political chaos this would cause if the Union won the war? It was a war measure, to weaken the power of the Confederate States of America, or the Confederacy, and while it did not technically free any slaves because Lincoln at this time had no way to enforce the Proclamation in the succeeded states, it changed the terms of the war, adding a moral dimension that foreign powers who had previously done away with slavery and serfdom would find hard to oppose.

Lincoln's Emancipation Proclamation quickly drew comparisons to Alexander's Emancipation Manifesto of just two years earlier, and served to strengthen the bonds between the two leaders and their countries. Even before the issuance of the Emancipation Proclamation, Alexander II had remarked to the U.S. Minister to Russia, Cassius Clay, in 1861, that Russia and America "were bound together by a common sympathy in the common cause of emancipation."[39] In a later meeting in 1864, Cassius Clay declared before Alexander II that the cause of emancipation was "a new bond of union with Russia," to which the Tsar agreed.[40] In 1863, The St. Petersburg Journal, a mouthpiece for the Tsar's government, praised the Emancipation Proclamation as "just and sagacious."[41] Literary figures such as the Russian Leo Tolstoy and the American Walt Whitman praised the Emancipation Proclamation for the freedoms it would give millions of Americans once the war was over.[42] An article in the Friend from the August, 1863 edition stated

> President Lincoln's Emancipation Proclamation stands beside the Imperial Ukase of the Emperor Alexander, giving liberty to millions of Russian serfs. The history of nations grants to their supreme rules but few opportunities of thus immortalizing their names—the names of President Lincoln and the Emperor Alexander [II] will never die among the exultant millions of their emancipated fellow men.

Yet not all Russian officials were so optimistic, the Baron de Stoeckl, Russia's minister to America, continued to persist for most of 1863 that the Emancipation Proclamation was "futile," and continued sending reports of its weakness and of Lincoln's troubles to Alexander II.[43]

The Emancipation Proclamation, which was issued on September 22, 1862 but went into effect on January 1, 1863, was signed during a period in American history when Lincoln held almost autocratic powers as a war president. During the war he suspended the writ of habeas corpus, strove to grow the power of the federal government by imposing an income tax to pay for the war, and massively increased the size of the army to fight the Confederacy. Thus the Emancipation Proclamation, a top-down reform that would have only been possible with the dubious gift of 'war powers.' While Lincoln had written the Emancipation Proclamation earlier in 1862, he was advised by his Secretary of State, William Seward, to wait for a Union victory to issue it, knowing that if issued during the disastrous summer of 1862 that it would be seen as "the last act of a crumbling regime."[44] As a lawyer, Lincoln knew the legality of the Emancipation Proclamation was dubious, and to this end he pushed for a constitutional amendment to abolish slavery. The Russian emancipation and the American emancipation, although similar in their attempt to set free from bondage large numbers of people residing in those countries, were undertaken for different reasons. The Tsar's Emancipation Manifesto was an attempt to liberate the serfs in Russia to modernize the economyand

to deal with increasing peasant unrest. The main effect of Lincoln's Emancipation Proclamation was not to free the slaves in the Confederacy, but rather to shore up support for the Union among its allies, namely Russia, and damage Confederate efforts for international recognition, a Union aim from the beginning of the war.

One major element that had the power to change the outcome of the Civil War was the matter of foreign intervention. If the governments of Europe unanimously threw their support behind either the Union or the Confederacy, the side chosen would have access to support which the other side could not hope to match. For the Confederacy this was a crucial element of their international activity, and likewise for the Union it was just as important to make sure that recognition was not accorded to the Confederacy. To a cultural observer, the Confederacy seemed to have an advantage to gaining foreign recognition at the beginning of the war. The aristocracy of Europe identified heavily with the lifestyles and attitudes of the southern planters. The representatives of the European governments in America lived in Washington D.C., which by all aspects was considered a southern city. These various European governmental officials socialized with slave owners and did business with them, and their reports back to their respective governments reflected this natural affinity to the southern system. Even Russia's foreign minister, Edouard de Stoeckl, heavily sympathized with the Confederacy in the early war years and was doubtful of Union successes until a few months before the war was over. In 1861, Stoeckl declared in a dispatch to St. Petersburg that in his view, the Confederacy had the courage of its convictions—they claimed a legal right to secession, a right once claimed by their forefathers who "shook off the yoke of English tyranny by revolution."[45] Yet, in writing about the reasons for the conflict he blamed both "the North for having provoked it, and the South for wanting to precipitate events with a speed which makes rapprochement (emphasis in the original) impossible."[46] Important to both the Union and Confederacy in winning the war was the recognition and support of three European governments in particular: Great Britain, France, and Russia.

From the very beginning of the Civil War, Great Britain made no secret of its wish to see America divide into two weaker countries. Much of the aristocracy that dominated the British government felt an affinity with the Southern planters. The government of Great Britain pushed for Confederate recognition because it would "weaken a dangerous commercial competitor, remove a barrier for the advancement of England's interests in the Western Hemisphere, and free a source of cotton supply."[47] In 1861 the Russian minister to England, Baron de Brunov reported

> The English Government, at the bottom of its heart, desires the separation of North America into two republics, which will watch each other jealously and counterbalance each other. Then England, on terms of peace and commerce with both, would have nothing to fear from either; for she would dominate them, restraining them by their rival ambitions.[48]

England did not desire to wage war against the Union for the Confederacy; recognition would serve the economic and political needs of England without involving that country in a costly war. In France, Napoleon III had more militaristic ambitions, proposing an alliance between the Confederacy and his puppet government in Mexico headed by the Austrian Prince Maximilian. Eventually, Napoleon III hoped to create a new empire in the Western Hemisphere to rival the imperialist ambitions of his European neighbors at the expense of the preoccupied Union, and to achieve this he proposed at several different times schemes to recognize the Confederacy.[49] All of these efforts by England and France were failures in the end, and efforts to recognize the Confederacy abated after Lincoln issued the Emancipation Proclamation and the Union started to realize battlefield success. While many in the governments of England and France were supportive of the Confederacy, the majority of the population in both countries was opposed to slavery and saw in the Confederacy an embodiment of a repressive and morally bankrupt government, in contrast to the Union which was perceived as fighting against bondage and corruption. Nevertheless, the biggest ally on the Union side in its fight to defeat Confederate recognition was Russia.

Looking through the lens of the American Civil War, Russia was opposed to anything that England worked for, like Confederate recognition. If England wanted Confederate recognition to weaken the United States and secure a steady supply of cotton, Russia wanted to ally itself with the Union and oppose Confederate recognition. Russia desired a strong and unified United States and worked to this end to provide for its important geopolitical ally against England. Support for the Union came in many forms. In early 1861, Stoeckl was the first to warn the United States of Napoleon III's plan to form a coalition of three powers, England, France, and Russia, to force the North to grant peace terms to the Confederacy. Stoeckl pledged to Lincoln that if Maryland succeeded from the Union that Russia would still consider Lincoln the president, that Stoeckl would travel to wherever Lincoln moved the government, and would only recognize the Confederacy if it was established as an independent country by peace terms or by winning the war.[50] Although Stoeckl originally was supportive of the principle of succession, he quickly changed his mind when, after the emancipation in Russia, his own country began going through a period of internal instability. In a letter to the Russian Foreign Minister, Prince Gortchakov in May 1861, he stated that

> To permit the principle of secession, that is to say,

> the right of a State to break the federal pact when it decides that it is appropriate to do so, is to render absurd the very idea of confederation…If a state may secede at will, why…could not a county or city withdraw? The Constitution left wide latitude to future reforms through the amending process. This means was open to the Southern States. They failed to avail themselves of it.[51]

While Russia was an autocracy, the Tsar and his ministers understood the concept of a republic, and looked with disfavor upon any segment of society that attempted to violently revolt against centralized power.[52] In 1862, Lincoln sent a letter to the Tsar asking him where he stood on the question of foreign intervention. Alexander replied through his Foreign Minister, Prince Gorchakov to Bayard Taylor, the American charge at St. Petersburg, stating that "Russia alone, has stood by you from the first, and will continue to stand by you…We desire above all things the maintenance of the American Union as one 'indivisible nation.' Proposals will be made to Russia to join some plan of interference. She will refuse any invitation of the kind."[53] Such proposals were the most loyal that Lincoln received during the Civil War from any European government.

The Confederacy did try to secure recognition from Russia, realizing that without Russian friendship English and French recognition would not be forthcoming. Confederate President Jefferson Davis had some small reason for hope: he had many high-level contacts with Russia during his time as Secretary of War under the Buchannan administration.[54] Davis also held semi-dictatorial powers in his own Confederate government, and his relationship with Stoeckl went back from before the Crimean War. In November 1862, Davis sent Lucius Q. C. Lamar as Commissioner to Russia to plead for Southern independence, but Prince Gortchakov refused to meet with him.[55] The Russian support for the Union was unequivocal, and Davis soon abandoned all hope that he could secure recognition from Russia.

In 1863, Russia found itself facing an internal insurrection in Poland. Polish freedom-fighters buoyed initially by the Emancipation Manifesto but quickly crestfallen when the Tsar refused to extend self-government and land reform to Poland, started a number of demonstrations and uprisings across Poland. Russia was brutal in putting down what it considered an internal problem and considered foreign intervention to be unacceptable, in marked contrast to its own foreign intervention in the Hungarian uprisings of 1848.[56] Russia had few friends, and although America was asked by both England and France to intervene in the Polish rebellion, Lincoln stressed his belief in the principle of non-intervention in domestic disputes. This certainly was not the moral choice, and ran counter to American beliefs in self-determination, but what could the Union say about Russia's actions in Poland while fighting a war against secession and trying to stave off European intervention on the behalf of the Confederacy? While Lincoln's sympathy lay with the Poles, and it is doubtful that he had forgotten his critical words against the Russians over the Kossuth affair, he had to hold up the principle of nonintervention by foreign powers in domestic affairs.[57] The situation in Poland worried the Tsar, and it caused him to undertake the most misunderstood action in Russian-American relations during the Civil War—sending the Russian Navy on a visit to America.

In September 24, 1863, the New York Times reported in "A Russian Fleet Coming into our Harbor" of the arrival of the Russian Baltic fleet to New York harbor. Two weeks later the Russian Pacific fleet sailed into San Francisco harbor. Many at the time took this as a physical manifestation of the friendly rapport and support Russia had given to the United States throughout the war. In most newspapers on both sides this event completely overshadowed the recent Union defeat at Chickamauga, and many fetes and parades were held in both New York and San Francisco to honor the visiting Russians. It was widely assumed that the Russian fleet sailed to help protect the Union navy in case of direct English or French intervention, yet none of the Russian commanders had any orders to help the Americans in case of attack. The Tsar, not wanting to repeat the mistakes of the Crimean War, sent the fleet out of the Baltic Sea and away to the relative protection of American harbors in case tensions in Europe over the situation in Poland reached open warfare.[58] In a case of historical irony the Tsar sent his ships away for their protection to a country undergoing one of the most destructive wars of the nineteenth century. The Tsars ships stayed for almost seven months, and spent the entire time in American without any incident, but were they little help to the Union's war effort? The real benefit to the Union was a boost of morale, a physical showing of Russian friendship to the American people. Henry Clews, a New York Banker who also worked as a United States agent, noted that "it [the Russian naval visit] was a splendid 'bluff' at a very critical period in our history."[59] The Russian naval visit wrapped up the need for further Russian shows of support for the Union during the Civil War, as the threat of foreign intervention was almost nonexistent by mid-1864, with England and France losing faith in the Confederacy's ability to win the war.

With the signing of the surrender at Appomattox Courthouse in April 9, 1865, signaling the defeat of the Confederacy and the assassination of Abraham Lincoln just 5 days later on April, 14, 1865, it was the end of an era in America, but not for Russian-American relations. Shortly after the assassination of Abraham Lincoln, Alexander II sent his condolences to his widow Mary Todd saying that "he [Lincoln] was the noblest and greatest Christian of our generation. He was a beacon to the whole world—nothing but courage, steadfastness and the desire to do good."[60] Russian-American relations continued on a more or less positive vein throughout the nineteenth century and until the second decade of

the twentieth, with the Bolshevik Revolution forever changing the way the two countries thought of each other.

The relationship between Russia and America until the twentieth century was one of friendship, and it was strengthened by a mutual dislike of English power. The two countries were looking to expand their influence internationally, always at the expense of England. Russia and America, on the surface, were very different—despotic Russia was ruled by iron-fisted Tsars who attempted to hold on to autocratic powers while slowly doling out reforms to pacify a largely illiterate and landless serf population. This reliance on serfdom caused massive problems in Russia and was the impediment of industrialization and reform congruent with other Western powers. America was born amongst rhetoric of liberty and equality, founded on democratic principles, and considered the most revolutionary government of its day. Americans both spilled over into the vast frontier in the Western Hemisphere and concentrated commerce and industry, growing throughout the nineteenth century to become a major industrial power, while still relying on the institution of slavery to produce massive amounts of cotton to sell to Europe. Russia and America shared the similar systems of serfdom and slavery respectively, and shared the problems inherent with holding a large amount of the population in bondage.

These problems forced first Russia, then America, to undergo large-scale, top-down emancipations, but for different reasons. Tsar Alexander II, led by intellectuals and opposed by conservative aristocrats, issued what amounted to a partial emancipation that was at first bloodless, but frustration with the sluggishness of the emancipation allowed resentment to ferment in Russia. Abraham Lincoln emancipated the slaves as a war act, and the only real effect at the time was to change the character of the war to place slavery as a moral reason to fight, and this helped in the effort to stymie recognition of the slave-holding Confederacy. Both Russia and America supported each other during the period of the Civil War, with both countries focusing on reinforcing the principle of non-intervention in domestic disputes, and both working to frustrate English and French ambitions to profit from the instability caused by the destructive warfare. This relationship was self-serving, but both Russia and America benefitted, and in studying the correspondence between the two countries, a genuine feeling of friendship can be seen between Russia and America during the Civil War era.

**Notes**

[1]Beran, Forge of Empires 1861-1871, 12.

[2]By the time of Emancipation in 1861, the Russian government controlled around twenty-two million serfs out of a total population of around forty-seven million.

[3]All was not always well in the family, it is estimated that there were six instances of Serfs murdering their landowners per year Beran, Forge of Empires, 1861-1871, 91.

[4]Roger Bartlett, A History of Russia, (Houndmills, Basingstoke: Palgrave Macmillan, 2005), 102.

[5]Beran, Forge of Empires, 1861-1871, 14.

[6]Alexandre Tarsaïdzé, Czars and Presidents: The Story of a Forgotten Friendship, (New York: McDowell, Obolensky Inc., 1958), 173.

[7]Howard Jones, Abraham Lincoln and a New Birth of Freedom: The Union and Slavery in the Diplomacy of the Civil War, (Lincoln, Nebraska: The University of Nebraska Press, 1999), 20.

[8]Revolt in Tsarist Russia included The Pugachev Rebellion of 1779, Stenka Razin, and the various Tartar Uprisings.

[9]Albert Woldman, Lincoln and the Russians, (Cleveland: The World Publishing Company, 1952), vii.

[10]Woldman, 125.

[11]Woldman, Lincoln and the Russians, 4.

[12]Woldman, Lincoln and the Russians, 4.

[13]Woldman, 5.

[14]See Woldman, Beran, Tarsaïdzé

[15]Woldman, 6.

[16]Woldman, 6.

[17]Woldman, 7.

[18]The incredible story of the American Colonel Gowen and his successful raising of over eighty percent of the ships in the Crimea can be found in Tarsaïdzé, 159-164.

[19]Woldman, 10.

[20]Tarsaïdzé, 150.

[21]Tarsaïdzé, 156.

[22]Woldman, 11.

[23]Frank A. Golder, "Russian-American Relations during the Crimean War," American Historical Review, Vol. 31 (1925-26), p. 465.

[24]Williams, 21.

[25]Beran, 37.

[26]Bartlett, 112.

[27]Woldman, 170.

[28]Williams, 19.

[29]Beran, 38.

[30]Alexander II recognized that the impact of the manifesto could be explosive, so he instituted a two year waiting period for its implementation. Coincidentally, it went into effect around the same time as Lincoln's Emancipation Proclamation.

[31]Beran, 89-90.

[32]Beran, 27.

[33]Beran, 52.

[34]Woldman, 20.

[35]Tarsaïdzé, 152.

[36]Woldman, 10.

[37]Beran, 51.

[38]James McPherson, Battle Cry of Freedom: The Civil War Era, (Oxford: Oxford University Press, 1988), 186.

[39]Woldman, 109.

[40]Woldman, 179.

[41]Woldman, 181.

[42]Beran, 62.

[43]Woldman, 185.

[44]Beran, 134.

[45]Woldman, 32.

[46]Woldman, 25.

[47]Woldman, 84.

[48]Dean B. Mahin, One War at a Time: The International Dimensions of the American Civil War, (Washington D.C.: Brassey's, 1999), 24.

[49]Woldman, 86.

[50]Woldman, 39.

[51]Woldman, 64.

[52]Mahin, 199.

[53]Beran, 156.

[54]Woldman, 41.

[55]Woldman, 134.

[56]Woldman, 157.

[57]Woldman, 159.

[58]Woldman, 141.

[59]Woldman, 165.

[60]Beran, 242.

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# Why Latin Should Be Reinstituted As an Educational Requirement

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In the past, studying Latin and obtaining an education were nearly synonymous. William Harris, a professor emeritus of classics at Middlebury College says, "We stand at the end of a century long educational tradition, in which the study of Latin language and literature was once the mainstay." In the 1960s, Latin began to decline as an educational requirement on account of the rise of modernism in schools, and not until recently has it seen a significant resurgence in school curricula (Hu). Educational administrators debate over the practicality of learning a dead language in today's society, but many are beginning to take notice of the possible benefits such a course could offer. Because of its capacity to advance students' understanding of English grammar and vocabulary, studying Latin should be a compulsory subject in primary schooling.

Learning Latin can enable students to identify and properly use grammatical components and concepts. English grammar, especially in casual conversations and correspondences, is often disregarded since the ability to distinguish one grammatical entity from another is rarely crucial as long as the correct meaning is conveyed. For example, someone may say he needs to return a book to the library, but it is unlikely that he will identify "book" as the direct object, and "library" as the indirect object because the sentence already makes sense to the hearer without needing further analysis. The growing neglect of grammatical awareness, as well as other factors, can make English grammar a challenging subject for students. Matthew Teorey, a professor of composition and technical writing at the University of New Mexico, observes that his freshman students find it increasingly difficult to use grammar properly, and furthermore they seem unable to understand how English grammar works. This dilemma may be attributed to a variety of factors, but it is also possible that the blame may lie, at least in part, with the sometimes vague and confusing nature of English. Latin grammar is extremely specific by comparison. For example, each grammatical component is clearly delineated by a corresponding case in the form of a word ending which indicates a word's function in the sentence even in the midst of syntactical variation. Once the concept of cases and word functions is understood, this understanding may be transferred to English to help the student see the correspondence between the cut-and-dried mechanics of Latin and the more ambiguous mechanics of English.

My own understanding of English grammar and vocabulary has benefited immensely from my studies in Latin. Before I began Latin, I considered grammar to be a nightmare. I had a weak grasp of grammatical basics, was convinced that direct and indirect objects were from another planet, and could not have ventured to guess what "predicate" or "nominative" meant under any circumstances. Once I started Latin, I not only learned to classify the parts of a sentence and other aspects of grammar, but also to explain how and why they worked as they did. The practice of constantly deciphering Latin grammar enabled me to decipher English grammar and ultimately gave birth to my abiding appreciation and love for grammar and language in general.

In addition to providing grammatical insight into English, the study of Latin can help students ascertain the meanings of English words unfamiliar to them. As one of the major origins of English, a multitude of words has been borrowed by and incorporated into English, and it is estimated that Latin-derived words constitute approximately 50%-60% of English vocabulary. Obtaining even a rudimentary Latin vocabulary can yield an expanded English vocabulary useful in many facets of schooling, such as reading comprehension, writing, science, and testing. According to a compilation of studies conducted from 2003-2010 by the College Board which examined the scores of students who took the verbal section of the SAT, students who had taken Latin in school consistently displayed scores of over 670, while those who had studied other languages never scored above 643 ("Latin"). Latin vocabulary is also valuable in fields which utilize masses of Latin terminology (such as medicine, law, and the sciences), and for the student who embarks upon a career in one of these fields, a foundation in Latin can facilitate attaining fluency in the respective field's jargon.

Despite the fact that Latin was the most studied language in American secondary schools up until 1928 ("Teaching"), many people consider learning a dead language to be a waste of time. They argue that if it must be compulsory to study a language in school, then a modern language, which could be used in travels, jobs, and communication, would be more practical. While it is true that learning modern languages is absolutely relevant and should be encouraged, studying Latin in particular can prove advantageous to the student of Latin-derived languages. Even if a student wishes to study a language unrelated to Latin, the grammatical foundation he receives in Latin could prevent confusion later on when more complex or unusual grammar is encountered in the modern language.

As our society moves further and further away from reverence for the past and continuously affixes its efforts and attention on the future, it is easy for us to discard old institutions in the wake of modernism. The younger generation of America contests the emphasis on grammar in modern-day society, questioning the actual significance of having a solid command of English when it seems more practical to conquer the latest technology. Yet some of the antiquated methods may indeed serve the same end in the present as they did in the past – namely, as in the case of Latin, by assisting the comprehension of the English language's complexities.

It is true that the chances of a classical language thriving in a modern environment are doubtful, and, if Latin is to be undertaken with any amount of enthusiasm, it may be necessary to exchange the traditional methods of teaching for ones better pertaining to the society in which they are learned. Many in the educational field have already recognized this need and have developed innovative curricula and teaching styles which students find exciting and more akin to learning a modern language. Students and teachers alike have begun to realize the importance of keeping Latin alive, and it is to be hoped that this realization will continue on a nationwide scale for the purpose of improving education and inspiring love and respect for this ancient language.

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# Cross-cultural genomics – a new discipline?

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In his book Culture and Health, MacLachan (2006) cites Mallaby (2002):

> A century from now, when historians write about our era, one question will dwarf all others, and it won't be about finance or politics or even terrorism. The question will be, simply, how could our rich and civilized society allow a known and beatable enemy to kill millions of people? (p. 259)

That killer is HIV/AIDS, and MacLachan, possibly influenced by his work with AIDS in Africa appears to agree with Mallaby.

While HIV/AIDS will certainly be a major historical issue, it can be argued that there is a more important, although somewhat related issue, and that is how the genomic revolution will affect not only health, but the future of humankind. Genomics studies may in fact hold the solution to HIV/AIDS. The issue that will be addressed here is the impact of genomics on the health problem caused by deleterious genetic mutations. The emphasis will be on the astounding number of individuals, perhaps 1:6 of the world's population (Weatherall & Clegg, 2001) that have deleterious genetic mutations related to malaria resistance.

Genomics can be defined as the study of genes and their functions. The term genomics was proposed by Tom Roderick to Frank Ruddle and Victor McKusick as the name of the new journal they were founding in 1987 (McKusick and Ruddle, 1987). McKusick and Ruddle described this discipline as "born from a marriage of molecular and cell biology with classical genetics and … fostered by computational science."

I am here proposing the term "cross-cultural genomics" for the study of the genomics of different cultures, how the genes of the individuals in a culture affect that culture and how that culture interacts with its environment, including such aspects of the environment as disease and disease vectors, and, finally, how all those aspects affect the interaction of that culture with other cultures.

**Evolutionary Background of the Problem:**

In looking at the origins of the human species, most evidence strongly points to Africa as the origin of man. Modern man, Homo sapiens, is thought to have evolved in Africa, and then spread from Africa to the rest of the world. The forbears of the world's population outside of Africa left Africa perhaps 40,000 years ago (Kwiatkowski, 2005; Tishkoff et al., 2001).

In the time periods prior to those forbears leaving Africa, and for tens of thousands of years afterward, humans lived as small bands of hunter-gatherers. This lifestyle and the climate in Africa did not lend itself to the interaction of man, disease and vector that would later cause malaria to become a devastating scourge. It is felt that the development of agriculture brought about the conditions where man, the protozoan parasites of the genus Plasmodium, and the insect vector Anopheles mosquitoes could interact to cause the disease malaria and in particular the form caused by *Plasmodium falciparum* (Kwiatkowski, 2005;Tishkoff et al., 2001).

In response to the effects of that disease, African man (AM) evolved. Mutations that occurred in AM that provide protection against malaria were so important that they were put under great selection pressure. Over the next 10,000 years many of these mutations reached very high frequencies. One of these mutations that became very important was a mutation in the red-cell protein hemoglobin, specifically the B-chain (Kwiatkowski, 2005). This mutation in the hemoglobin gene causes the hemoglobin gene to aggregate in such a way that the red blood cells in which the hemoglobin resides are deformed or "sickled" (see Figure 1).

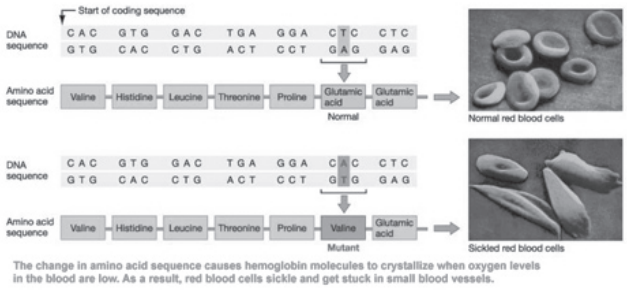


Figure 1. The mutation in the sickle cell gene and sickled cells. (fig.cox.miami.edu)

These sickle cells do not survive as well as normal cells and can cause a sometimes severe anemia, termed "sickle cell anemia". Individuals have two copies of the B-hemoglobin gene, located on human chromosome 11 (Deisseroth et al., 1978). One copy is from the father and one from the mother. If one of these genes is normal and thus produces a normal B-hemoglobin termed "A" and the other produces the sickle hemoglobin, termed "S", the hemoglobin molecules formed do not aggregate and cause sickling. These individuals, with one abnormal copy of the sickle cell gene do not develop "sickle cell anemia" and are termed "carriers" (Stuart & Nagel, 2004). As shown in Figure 2 when a man who is a carrier mates with a woman who is a carrier, they have a 1:4 chance of having a child with sickle cell anemia, a 1:2 chance of having a carrier, and a 1:4 chance of having a normal child.

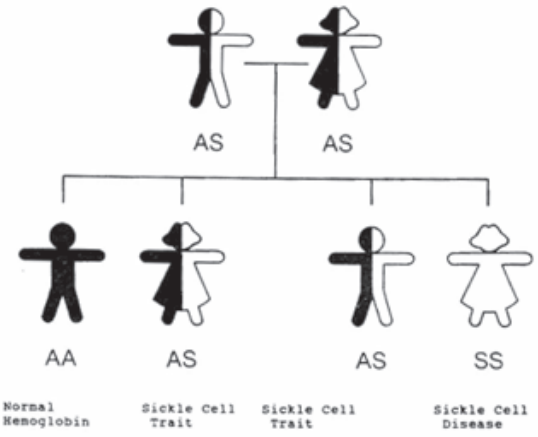


Figure 2. Result of mating of two sickle cell carriers. (http://www.state.nj.us/health/fhs/sicklecell/images/inheritance.gif)

In Africa, for most of the past, and even to this day, those individuals who were SS, and had sickle cell anemia,

usually died before being born or during early childhood. For example, it was found in Nigeria that more than two percent of all newborns had sickle cell anemia, but it was absent in the adolescent and adult population, because all the children died before adolescence (Weatherall et al., 2001) AS carriers however, were healthy, and in addition were highly resistant to the lethal effects of P. falciparum malaria (Kwiatkowski, 2005). The normal, AA, individuals were more susceptible to malaria, and often died in childhood. If they survived to adulthood, women who were AA were more likely to succumb to malaria during pregnancy (Stuart and Nagel, 2004). Thus over time, in areas heavily prone to malaria, the percentage of the population that were AS, or carriers, rose to very high percentages. A number of other gene mutations also cause resistance to malaria. These include mutations in the gene for Glucose-6-Phosphate Dehydrogensase (G6PD) which cause lower activity levels, absence of the Duffy blood group, and abnormalities of hemoglobin production termed the thalassemias. These are reviewed elsewhere (Tishkoff et al., 2001; Kwiatkowski, 2005).

While malaria apparently arose in Africa, it eventually moved out of Africa to other areas, and affected populations of those humans whose ancestors had left Africa millennia ago. Mutations arose in those populations as well, and were selected for. Many of these were the same e.g. the sickle mutation in the B-hemoglobin gene, and mutations of G6PD, but the thalassemias predominated in some of these areas, particularly Asia (Weatherall & Clegg, 2001).

**Scope of the problem:**

When we just consider deleterious mutations related to malaria resistance in the world the numbers are staggering. The overwhelmingly most common genetic mutation in a human enzyme is G6PD deficiency. There are an estimated 400 million individuals with this abnormality. For most of these individuals this abnormality is not a life-threatening problem, but certain foods or medications can precipitate a life-threatening hemolytic anemia in individuals who are not aware they have this mutation (Tishkoff et al, 2001; Guindo et al., 2007). Another 400 million individuals carry deleterious genes causing hemoglobin disorders. It is estimated that perhaps 400,000 infants are born each year with severe forms of these diseases (Weatherall & Clegg, 2001; Fortin, Stevenson & Gros, 2002).

Currently the world is in a transition phase. Malaria is still a severe problem in sub-Saharan Africa, and there has been a resurgence of malaria due to traditional medications such as chloroquine becoming less effective, and mosquitoes becoming more resistant to insecticides. In areas still severely affected by malaria, these mutations are perhaps still, on average, beneficial. But in areas where malaria has largely been eradicated, countries now have to come to terms with treating huge number of individuals with hemoglobinopathies. In Asia the thalassemias predominate. In Africa sickle cell disease predominates (Weatherall & Clegg, 2001; Kwiatkowski, 2005).

In considering Africa, the potential health burden is huge. Currently HIV/AIDS and malaria are such a huge problem in Africa that the impact of these hemoglobin diseases is not yet being fully felt. But if Africa conquers HIV/AIDS and malaria is also conquered, the majority of the surviving population will be carriers for or will have deleterious genetic diseases. Weatherall and Clegg (2001) state:

> Because some of these inherited haemoglobin disorders, if left untreated, result in death in the first few years of life, their effect on the burden of health care is only now being appreciated in many parts of the world; it is only when improvements in hygiene, nutrition, and the control of infection reduce childhood mortality rates that babies with severe haemoglobin disorders survive long enough to present for diagnosis and treatment. As a result of such demographic changes, the impact of these diseases is now being felt all over the Indian subcontinent and in many parts of Asia, and this will undoubtedly be the case in sub-Saharan Africa as it undergoes a similar transition.

In areas where malaria does not exist anymore the genes that were selected to protect against malaria are no longer advantageous, and in many cases are highly deleterious. While the overall picture is dismal, there are some bright spots, and Cyprus is one of them.

**The Cyprus Experience (Bozkurt, 2007):**

Cyprus is an island nation in the Mediterranean with a population of about 750,000 people. Its economy is primarily dependent on tourism. Prior to World War II there was a very serious problem with malaria on Cyprus. Shortly after that however, malaria was eradicated. It was at this point that Cyprus became aware of a very serious problem with B-thalassemia. Prior to that most of these children died in early childhood and were lumped in with deaths due to malaria. After World War II, with improving economic and health care conditions these children survived and began using an increasing proportion of health care resources.

Studies in 1979 showed that about 15% of Cypriots were carriers for the B-thalassemia mutation, the highest percentage in the world. 2% of the marriages resulted in the birth of thalassemic children. It was projected at that time that in 50 years there would be 2,000 cases of thalassemia, and that this would consume the entire health resources of the island. In the absence of control measures Weatherall (2001) estimated that in 40 years approximately 78,000 units of blood per year would be required to treat affected children and the percentage of the population who were carriers would increase to 40%.

A thalassemia center was thus started. Information about thalassemia was provided to the populace. In 1980 a law was passed requiring mandatory testing for thalassemia before marriage. Initially this was to discourage marriages between two carriers. In 1984 prenatal diagnosis was started. The Orthodox Church gave a dispensation allowing the termination of pregnancies that would result in thalassemic children. The initial diagnostic method was sampling of the cord blood using a fetoscope at 22 weeks pregnancy. Termination at this late date was stressful and discouraged full participation, but the number of thalassemic infants born did decrease from 18-20 to 6-7 per year. In 1991 DNA methods were introduced that allowed detection and termination at 12-14 weeks. This was much more acceptable. Only 5 affected babies were born in the 10 year period following 1991. No baby affected with thalassemia has been born since 2002. In the last few years Preimplantation Genetic Testing (PGD) has become available for couples at risk.

Thus in a period of 50 years Cyprus went from a developing country with a severe malaria problem, to a

country with a serious thalassemia problem caused by the prior selection pressure of malaria, to a developed country where there are no longer infants born with thalassemia.

This is even more remarkable when it is realized that Cyprus is a nation divided in two by strife between Greek Cypriots and Turkish Cypriots. Despite this a country wide program was successfully implemented.

**Malaria and Sickle Cell Disease in the United States:**

African slaves brought the sickle cell gene to America. Malaria also came from Africa to the New World. In the slavery period of the United States there was still a considerable advantage for the sickle cell gene to of slaves in the South, where malaria was prevalent. As in Africa, those who were SS probably died in infancy or childhood, while those who were AS did much better (Kwiatkowski, 2005).

Malaria was eradicated in the United States shortly after World War II, through a combination of drainage projects, and massive spraying with DDT. While 1-2,000 cases are detected in the United States each year these case overwhelmingly are contracted by individuals who travel abroad and then return (CDC, 2008). As there is no longer any indigenous malaria in the United States there is no advantage to carrying the sickle cell gene. There are however severe disadvantages to those who are homozygous (SS) for the sickle cell gene and who have sickle cell anemia.

There are currently about 80,000 individuals in the US who are SS and have sickle cell anemia. Due to a number of medical advances, these individuals have a greatly improved life span, and many now live past 50. There are approximately 3 million carriers for the AS gene in the US, predominantly among African-Americans, but in other ethnic groups as well. For example while 1:12 African-Americans carries the sickle cell gene, about 1:100 Hispanics are carriers (National Human Genome Research Institute, 2007).

What are the options for those individuals born with sickle cell disease and for those who are carriers and want to reproduce? For those with sickle cell disease there is the possibility of being "cured" by having bone marrow transplants. These are expensive, have a significant risk of death, and older individuals are not candidates (Stuart & Nagel, 2004).

What are the reproductive options for those who are SS? With the present level of care many women with sickle cell anemia survive into adulthood and are able to become pregnant and have children. If the father were SS all their children would have sickle cell anemia. Most SS males are infertile. A thorough literature search was not able to find any report of the mating of an SS female with an SS male. If this has occurred it is very, very rare. If the father is AA, all children will be AS carriers.

If an AS person mates with an AA person, 1:4 of their offspring will be AS, the rest will be AS. None will have sickle cell disease.

If an AS person mates with another AS person however, then there are some very tough choices. Barring some type of intervention there is a 1:4 chance of that couple having an SS child. Most of the SS children in the United States are results of this type of pairing (See Fig. 2). What is the cost of these genetic diseases in the United States? Petersen et al. (2004) have estimated the lifetime healthcare cost for each case of sickle cell disease at $500,000., and for B-thalassemia at 1.5 million dollars. A 1997 study (Davis et al, 1997) showed the yearly cost of hospitalizations for sickle cell disease was $475 million. With inflation this cost today would be well over 1 billion dollars.

Despite the ready availability of genetic testing, including prenatal testing and the availability of pregnancy termination, this option is not chosen by most women who may be pregnant with a child with sickle cell anemia. A study in Rochester, New York found that less than half of pregnant African-American women at risk of having affected fetuses availed themselves of prenatal diagnosis (Markel, 2006). Markel (2006) in a review of genetic testing in the United States attributes much of the resistance to testing to the legacy of ill-conceived programs in the 1970s that mandated testing of African-Americans for the sickle cell gene. According to Markel the mandatory New York screening programs were called "genocidal health practices" of the white medical establishment.

**United States Physicians, Abortion, and Genetic Disease:**

Allopathic physicians (M.D.'s) as well as osteopathic physician's (D.O.'s) are trained in the scientific origin and treatment of diseases. Yet the approach to evaluation and treatment of disease can be strongly dependent on nonscientific beliefs such as religious beliefs. For example there are those physicians who believe that abortion is morally wrong and those that think that abortion is morally right, as well as a majority who fall along the spectrum between extreme pro-life and extreme pro-choice (Pratt, Koslowsky & Wintrob, 1976; Bouchard & Renaud, 1997).

This distinction is important when considering the appropriate approach to dealing with genetic disease, in particular diseases that are dependent on mutations in single genes, as these are genes that can be readily tested for. The single genes that are responsible for a large and growing number of diseases have been identified and tests are now readily available. There are a number of genes that have mutations that increase risks for certain cancers such as breast, ovarian, and colorectal cancer. Other devastating diseases caused by mutations in single genes, and for which there are active screening programs, are Tay-Sach's disease and cystic fibrosis. Then there are the hemoglobinopathies, including sickle cell disease and thalassemia, which are related to the selection pressure of malaria.

Dealing effectively with these diseases involves a multifaceted approach, including treating those individuals that already have the diseases. Treatment can be extremely expensive, involves great suffering for the patients, and is often futile.

One way to deal effectively with these diseases is prevention through informed reproductive decisions. This often involves testing fetuses in pregnancies at risk and, if the disease is found to be present, terminating the pregnancy. While this is effective, and the Cyprus example shows how effective this can be, if U.S. physicians and/or patients have moral or ethical reservations, this limits the effectiveness of preventing genetic diseases or conditions, including chromosomal abnormalities such as trisomy-21, the cause of Down syndrome. Catholics are the largest single religious group in the United States. According to the Church and the Pope, termination of a pregnancy because of any birth defect, no matter how horrible, is forbidden. It is a mortal sin, and can result in the soul of the perpetrator going to hell (Bouchard & Renaud, 1997).

Within the United States we are dealing with a closed system. We cannot dictate reproductive decisions to individuals, but when considering immigration into the United States there are other options. There is

considerable control over legal immigration to the United States; all legal immigrants are medically screened, and there are a number of medical conditions (including HIV/AIDs) that are the basis for exclusion (CDC, 2008). If the U.S. health system cannot effectively deal with genetic conditions, it would perhaps be advisable to consider denying immigration to individuals who have deleterious genetic mutations, especially if those genetic conditions could be more effectively dealt with in their country of origin.

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**Appendix A. Malaria and the Malaria Hypothesis (Weatherall & Clegg, 2001; Tishkoff et al., 2001)**

Human malaria is caused by infection of the blood by protozoan (as opposed to bacterial or viral) parasites of the genus *Plasmodium* the four species known are *Plasmodium falciparum, Plasmodium malariae, Plasmodium ovale,* and *Plasmodium vivax*. The great majority of human cases are caused by *P. vivax* and *P. falciparum*. They are all transmitted by the bite of female Anopheles mosquitoes. These mosquitoes are active and bite predominantly at night.

Malaria has historically been a huge problem in much of the world and remains so today. According to the CDC there are between 350 and 500 million clinical episodes of malaria every year, and at least one million deaths occur every year. While in the past there were more deaths in Asia than Africa at this point in time over 60% of the cases of malaria and more than 80% of the deaths worldwide occur in sub-Saharan Africa. Most of the mortality from malaria now comes from *P. falciparum*.

Malaria has never been a problem in Hawai'i, despite a climate ideal for it, as there are no Anopheles mosquitoes here.

Whether there was any form of malaria in the New World before Columbus is not clear. There certainly was not any *P. vivax* or *P. Falciparum*. But *P. Vivax* and *P. falciparum* were soon introduced and by 1850 malaria was present throughout North and South America in tropical, subtropical and temperate climates. Even into the twentieth century malaria had a dramatic effect in the southern United States with equivalent land in the North selling for about 12-20 times that in the South due to the effects of malaria. It was only with the widespread use of DDT, along with drainage projects that malaria was brought under control in the United States and considered eradicated by the 1960's.

The widespread use of quinine and its derivatives such as chloroquine, and the use of DDT brought dramatic reductions in malaria to much of the world after World War II.

The effect of malaria on recent human evolution has been described as the malaria hypothesis. This hypothesis proposes that human genetic polymorphisms, in particular those effecting the erythrocyte, have been selected to high frequencies in areas affected by malaria, because they protect against malarial infections.

While not all agree on details of the hypothesis the broad outline is as follows.

First it is widely accepted base on many lines of evidence that human beings originated in Africa as hunter-gatherers. About 40,000 years ago humans left Africa to colonize the west of the world. It is possible that there were earlier migrations, but if there were they came from the same population that provided the later migrations. It is felt that malaria was not a major disease of man in the hunter-gatherer phase. Thus, in this phase there was no selection for the any mutations that arose that might have provided protection against malaria and those were thus absent in the early immigrants from Africa.

The next phase of the hypothesis is the development of rudimentary forms of agriculture about 10,000 years ago. The resulting environment, including forest clearing, and human populations staying in one place apparently proved ideal for the interaction of Anopheles mosquitoes, *Plasmodium* species, and man to produce a serious malaria problem. In response to that problem, human gene mutations that arose and provided protection against malaria were selected for and a variety of these mutations became common in areas such as Africa and the Mediterranean. Areas that were climatically unsuited to the Anopheles mosquitoes, such as Northern Europe, and areas where Anopheles mosquitoes were absent, which included most of the Pacific Islands of Polynesia and Micronesia did not show these mutations.

Mutations which are thought to provide protection against one or more forms of malaria are sickle cell anemia (hemoglobin S) the thalassemias, glucose-6-phosphate dehydrogenase deficiency, hemoglobin C, hemoglobin E, ovalocytosis and Duffy blood type negativity. Not all of these mutations are deleterious, but most are.