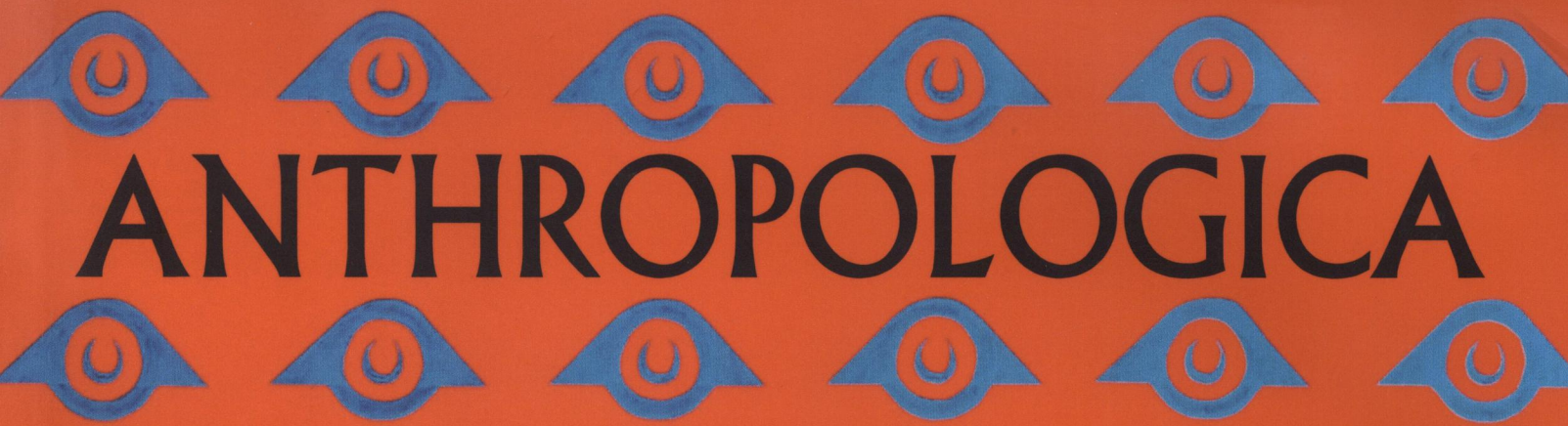




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ANTHROPOLOGICA

Vol. 57 N° 1, 2015

2014 Weaver-Tremblay Award Winner

Applied Anthropology: Disciplinary Oxymoron?

Regna Darnell 1

Thematic Section / Section thématique

Kinship Travel: Relatedness through International Tourism and Travel Networks / Le voyage de parenté : La création de liens familiaux par le tourisme international et les réseaux de voyages

Guest Editors / Rédactrices invitées : *Frayda Cohen, Amy Speier and/et Susan Frohlick*

Introduction: Kinship Travel

Frayda Cohen, Amy Speier and Susan Frohlick 13

Introduction : Le voyage de parenté

Frayda Cohen, Amy Speier et Susan Frohlick 19

Czech Hosts Creating “a Real Home Away from Home” for North American Fertility Travellers

Amy Speier 27

Tracing the Red Thread: Chinese–U.S. Transnational Adoption and the Legacies of “Home”

Frayda Cohen 41

Blood, Sweat and Dummy Tummies: Kin Labour and Transnational Surrogacy in India

Amrita Pande 53

“Souvenir Babies” and Abandoned Homes: Tracking the Reproductive Forces of Tourism

Susan Frohlick 63

Concluding Remarks: Kinship between Choice and Contestation

Yasmine Ergas 77

Ideas: Papers in Honour of Malcom Blincow

Guest Editors / Rédacteurs Invités : *Karl Schmid and/et Shubhra Gururani*

Ethnographies of the Political: Honouring Malcolm Blincow

Shubhra Gururani and Karl Schmid 83

Les ethnographies du politique : en l'honneur de Malcolm Blincow

Shubhra Gururani et Karl Schmid 87

Ethnic Boundaries in Contemporary Rwanda: Fixity, Flexibility and Their Limits

Laura Eramian 93

The “Ethical” Framework for Counterinsurgency: International Law of War and Cultural Knowledge in the U.S. Army and Marine Corps Counterinsurgency Field Manual

Salman Hussain 105

Accumulation by Dispossession in Tourism

Karl Schmid 115

In the Shadow of the Razor Wire: Class and Insecurity in Guatemala’s Urban Core

M. Gabriela Torres 127

From Proactive to Complacent Politics: Reproducing Spaces of Inequality in a Bolivian Marketplace

Kathleen E. Gordon 139

Power and Violence: The Making of “Modernity”: a Conversation with Malcolm Blincow

Daniel Yon 151

Articles

Livelihoods, Value and Knowledge in Contemporary Paraguay <i>Elizabeth Finnis and Heather Millman</i>	157
Local Knowledge/Lacking Knowledge: Contradictions in Participatory Agroecology Development in Bolivia <i>Jenny Cockburn</i>	169
The Site of Lead: Social Poisoning in El Salvador <i>Hugo De Burgos</i>	185
Targets of Salvation: Ovumula Women with Tuberculosis and the Potential of the “Unreached” in Medical Mission <i>Rebecca Plett</i>	199
Cross-Sex Siblingship and Marriage: Transformations of Kinship Relations among the Wampar, Papua New Guinea <i>Bettina Beer</i>	211
Processus d’altération de l’obeah à Sainte-Lucie <i>Marie Meudec</i>	225

Museum Review

“The Future Looks Rad from Where I Stand”: A Review of <i>Claiming Space: Voices of Urban Aboriginal Youth</i> at the UBC Museum of Anthropology <i>Kristin L. Dowell</i>	239
--	-----

Review Essay

Scholasticism versus Discovery in Kinship Studies: Review of Maurice Godelier’s <i>The Metamorphoses of Kinship</i> <i>Warren Shapiro</i>	247
--	-----

Book Reviews / Comptes rendus

<i>Sexuality, Women, and Tourism: Cross-Border Desires through Contemporary Travel</i> , by Susan Frohlick <i>Megan Rivers-Moore</i>	261
<i>Arab Spring: Uprisings, Powers, Interventions</i> , by Kjetil Fosshagen, ed. <i>Nayrouz Abu Hatoum</i>	262
<i>Queer Activism in India: A Story in the Anthropology of Ethics</i> , by Naisargi Dave <i>Michael Connors Jackman</i>	263
<i>Aux marges de la ville et de l’État. Camps palestiniens au Liban et favelas cariocas</i> , par Amanda S. A. Dias <i>Paula Vasquez Lezama</i>	265
<i>Des risques, des mines et des hommes</i> , par Sylvain Beaupré <i>Rafael Simoes Lasevitz</i>	266
<i>Un Cégep dans la rue. La grève étudiante de 2012 au Cégep régional de Lanaudière à Joliette</i> , par Flavie Trudel, dir. <i>Audrey Laurin-Lamothe</i>	267
<i>Le Chavisme. Un militarisme compassionnel</i> , par Paula Vásquez Lezama <i>Ricardo Peñafiel</i>	268

Notice of Errata	271
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2014 Weaver-Tremblay Award Winner

Applied Anthropology: Disciplinary Oxymoron?

Regna Darnell *University of Western Ontario*

Abstract: This essay argues that the term *applied anthropology* is an unnecessary oxymoron because the discipline of anthropology itself entails application of anthropological knowledge. Examples from the author's personal experience are used to argue for the application of anthropology as a process of seeing in a particular way, rather than as a mechanical expectation of particular changes embedded in research design. Collaboration of anthropologists with individual consultants and their communities is long established at the centre of applied anthropology. The Canadian Anthropology Society/Société canadienne d'anthropologie (CASA), in part through its recognition of the significant applied work of Sally Weaver and Marc-Adélaïd Tremblay, privileges an anthropology of application through dialogue and based in a relational ontology.

Keywords: applied anthropology, history of anthropology, collaborative anthropology, Cree, Ojibwe, interdisciplinarity

Résumé : Cet article soutient que le terme « anthropologie appliquée » est un oxymore superflu, dans la mesure où la discipline de l'anthropologie elle-même implique l'application du savoir anthropologique. Des exemples tirés de l'expérience personnelle de l'auteur sont utilisés pour plaider en faveur de l'application de l'anthropologie comme processus de vision particulière du monde, plutôt que comme attente mécanique de changements spécifiques intégrée à la conception de recherche. La collaboration entre anthropologues et consultants individuels, ainsi que leurs communautés, est depuis longtemps établie comme étant au fondement même de l'anthropologie appliquée. CASA privilégie, en partie par sa reconnaissance de l'important travail appliqué effectué par Sally Weaver et Marc-Adélaïd Tremblay, une anthropologie de l'application qui passe par le dialogue et fondée sur une ontologie relationnelle.

Mots-clés : Anthropologie appliquée, histoire de l'anthropologie, anthropologie collaborative, Cris, Ojibwés, interdisciplinarité



Introduction

Academics, sadly, have few opportunities to speak to their colleagues en masse, and I am delighted to address my fellow Canadian anthropologists, both directly at the annual meeting of the Canadian Anthropology Society/Société canadienne d'anthropologie (CASA) at York University in May 2014 and in this written version for our flagship journal.¹ I have added some examples and elaborations for verisimilitude, while still attempting to retain the flavour of the spoken word. Because the Weaver-Tremblay Award has traditionally recognized achievements in applied anthropology and few have identified me primarily as an applied anthropologist, I am simultaneously grateful for this honour and a tad

defensive about whether I really fit the traditional mandate. Precisely for this reason, however, I have thought a lot about the nature of applied anthropology and what might constitute excellence in pursuing it. While I applaud the recent revision of the award's description to recognize achievements in "anthropology," it seems to me that the "applied" part remains implicit, both in CASCA tradition and in our practice as anthropologists. So I use this opportunity to address what that might mean.

I am proud to stand in the genealogy of Sally Mae Weaver and Marc-Adélaïde Tremblay, each of whom I treasured as a colleague and a friend. Both of them worked within the system to make a better world through dialogue, through understanding the standpoint of others who were and continue to be part of "us" rather than some unintelligible other. Sal mediated elegantly (and my goodness she was elegant) between Indian voices and Canadian public institutions. Her work moved deftly between ethnography and theory/policy (Weaver 1972, 1981). She left us far too young, while the loss of Adé in March 2014 is far more immediate.

Adé built institutions through which the academy could serve society by applying anthropological knowledge. He founded the department at Laval around principles and practice of applied anthropology and developed an interdisciplinary social science approach to the society surrounding the university. He simultaneously reached out from region to province to a larger Canadian context, with an ethnographer's eye that encompassed Indigenous peoples, rural farmers, Quebec society. He was a careful steward of the checks and balances entailed by a bilingual professional organization, both for the Canadian Ethnology Society (CES) and CASCA. The Hawthorne-Tremblay Report on the status of Indigenous relationships to the Canadian state in 1957, although its recommendations were largely abortive, established a mandate for the application of anthropological knowledge to emerging and ongoing political and policy dilemmas.

Previous recipients of the Weaver-Tremblay Award constitute an equally distinguished though somewhat motley crew, as anthropologists are wont to be. It is a legacy in which we can all take pride.

It behooves us to begin our examination of the nature of applied anthropology by speaking about CASCA's own history and considering the degree to which it is generalizable to Canadian anthropology more broadly. When Julia Harrison and I exhorted our colleagues to define the singularity of Canadian anthropology a few years back in *Historicizing Canadian Anthropology*

(Harrison and Darnell 2006), CASCA was the only collective institutional framework available and yet CASCA is not representative of all Canadian anthropology. Our skewed access to a clearly defined collectivity aside, the results of our inquiries were neither definitive nor unambiguous. Canadian anthropologists could not define what they had in common with any great degree of consensus. Each contributor to *Historicizing Canadian Anthropology* took a different tack. Most favoured an inclusive definition of our professional identity, one that inevitably was blurred in its own boundaries. Despite this variability, however, there was widespread agreement that applied anthropology held a more prestigious place here than in the United States and that more of us did it in Canada (whatever "it" was).

In the early years of CASCA's predecessor organization, the CES, applied anthropology provided a unifying umbrella under which otherwise undifferentiated anthropologists met concurrently with separate associations of applied anthropologists and medical anthropologists, most of whom were also CES members. To my recollection, the term *ethnology* reflected the critical early support that Sal Weaver, Dick Preston, Adé Tremblay and others negotiated with the Canadian Ethnology Service of the National Museum of Canada. The scope of the organization was not entirely clarified by the splitting off of the anthropologists from the Canadian Association of Sociology and Anthropology in the early 1970s. At that time, the linguists, archaeologists and physical anthropologists declined to join the exodus, opting to remain in their more specialized and autonomous associations. The failure of Sal's proposed federation of anthropological sciences to capture the imagination of colleagues in other subdisciplines, none of whom had been active in the Canadian Sociology and Anthropology Association, militated against co-opting the term *anthropology* for the sociocultural anthropologists who remained to form the new organization. Nonetheless, *ethnology* failed to catch on as a cover term of self-identification, although it was not until 1990, under the presidency of Michael Asch, that CASCA reclaimed the holistic identifier of Canadian anthropology, unmarked in its potential extent. Indeed, ethnographically inclined linguists and the occasional archaeologist or biological anthropologist sometimes have joined us.

In this context, I tended to conflate the medical and applied groups within CASCA, and I suppose that others have done likewise. In my experience, they tended to be the same people. Over the years, CASCA has incorporated the medical and applied anthropologists within a single entity, simply anthropologists—except of course

when we gather to honour the legacy of Adé Tremblay and Sal Weaver as “applied.” What is now the Weaver-Tremblay Award was set up by the Society for Applied Anthropology and adopted by CASCA subsequent to the merger. Although the applied anthropology part now remains implicit, the intentions of many of the founders are still reflected in the CASCA website affirmation of the “belief that professional associations need, where appropriate, to take public positions on matters of social and political concern, particularly in cases which impact directly on those who have been the traditional subject of anthropological study” (CASCA n.d.). The distinction to be protected under the new regime was less one of discipline or subdiscipline than of the integration of the francophone and anglophone anthropological communities. In realizing this commitment, both Sal Weaver and Adé Tremblay were key figures. I conclude that applied anthropology in Canada does not operate in isolation from other variables that define us.

I wonder about the degree to which “the Canadian anthropologist” has incorporated these applied and medical identities. Medical anthropology, one of my own more recent excursions into new territory, has always seemed to me an applied subfield of anthropology, albeit one with fascinating theoretical implications and immense practical importance to the well-being of Canadians. And yet most practitioners seem to write primarily in a descriptive mode, focusing on the implementation of programs and models. Moreover, medical anthropology in Canada today functions under great duress—abandoned by the Social Sciences and Humanities Research Council (SSHRC), unintelligible to the Canadian Institutes of Health Research (CIHR), yet essential to Canadian society. I recently read a set of grant proposals in which several highly productive young medical anthropologists were retooling to represent themselves as anything else. A few had devised ways to continue their health-related work by calling it something else, but, sadly, more were simply moving to other fields of specialization. CASCA members, especially Janice Graham and Jim Waldram, have been articulate in leading the collective protest, with remarkably little effect to date. We anthropologists do not speak from a position of power, perhaps not even a position of authority from the standpoint of the quantitative biomedical evaluators privileged by CIHR. And yet I suggest that such interventions in public policy are nevertheless integral to our practice of applied anthropology more generally. This is one of the important ways we apply our expertise. When the funding of urgent medical anthropology projects is unobtainable for many of our colleagues, it is difficult to see a way forward for this crucial segment of our collec-

tive professional practice. We are losing a generation of young scholars and the continuity of this arena of application that we have built together.

Defining Applied Anthropology

Let me return to defining the beast. I suspect that Canada’s mediating but autonomous role between Anglo and American anthropology has something to do with the relative valuation that these national traditions place on the application of research results in the real world. British social anthropology, whatever its pragmatic efficacy (given that our British colleagues did not speak from a position of power either), aspired to guide colonial administrators in shouldering the white man’s burden. A.R. Radcliffe-Brown, whom I seldom quote since I am an unrepentant Americanist, nonetheless struck a resonant note for my own balancing act between the ethical and intellectual necessities of applying or practicing our discipline and a persistent fascination with ideas for their own sake, that is, with theory, a predilection I willingly acknowledge that I share. Radcliffe-Brown said this:

The recognition of applied social anthropology has certain very definite advantages and certain equally definite disadvantages. To mention only one of the latter, theoretical social anthropology is still in the formative stage. The demand of social anthropologists to spend too much of their time on practical problems would inevitably reduce the amount of work that can be given to the development of the theoretical side of the science. But without a sound basis in theory, applied anthropology must deteriorate and become not applied science but merely empirical practice. [1958:105-106]

Despite the whiff of things I like less here—the patronizing edge of *he* who knows best, the memory of civilizing the savage as the mandate of colonialism—Radcliffe-Brown enjoins us to toggle between styles and methods of thinking from the theoretical to the methodological to the pragmatic and political. Radcliffe-Brown intended, I think, a reversible circuit, rather than a stark binary choice. Nor do I think he intended to suggest that we should reconstitute the Victorian division of labour between armchair and field.

Lest we conclude that this conundrum has long since faded into disciplinary history, here is a 2014 statement:

The dominant narrative in academic applied anthropology is that we conduct research to solve practical human problems. The dominant practice in the field, however, seems to be that we do research but also

engage with people to facilitate change to improve local conditions ... In applied settings with many variable conditions that affect outcome, it remains important to generalize from our practice to develop theories of applied social change so that we learn as we go. [Preister 2014:1]

American anthropologists were already talking about applied anthropology by the mid-1930s in the context of “acculturation” as a panacea to cure the purported ills of a salvage ethnography increasingly accused by born-again functionalists from the other side of the pond of being insulated from the realities of then-contemporary Native American lives. A. Irving Hallowell, already a veteran of extensive field research in Canada with the Berens River Ojibwe, chaired the National Research Council Committee on Acculturation. When the Rockefeller Foundation stopped funding the social sciences after about 1933, however, this approach largely fizzled.

More recently, how applied anthropology, in its current manifestation of practising or public anthropology, got to be the fifth subdiscipline of the four-square Americanist tradition within the American Anthropological Association is another—and a distinctly un-Canadian—story. In this usage, it serves largely as a euphemism for someone who couldn’t get a job in academia and who thus was forced to settle for a non-academic position, someone who was usually embittered by their lack of agency in a rotten job market. Although the American Anthropological Association’s intention was to legitimate non-academic employment, to my ear, even then, the overtone was patronizing. The legitimacy of applied anthropology seemed to me to be recognized primarily when academic anthropologists also did such things in their spare time, whereas non-university-based applied anthropologists were tacitly excluded from theory as a prerogative of the academy.

I do not much like any of these ways of thinking about applied anthropology, nor do I think they capture adequately the quintessence of the Canadian anthropological experience. My institutional home away from home, the American Philosophical Society, was founded in Philadelphia by Benjamin Franklin in 1743 “for the promotion of useful knowledge” (APS n.d.b). The gentleman scholars of American colonial society (Thomas Jefferson, Albert Gallatin, John Pickering and Peter Stephen Duponceau among them) were men of affairs well endowed with the financial resources and cultural capital to pursue the sciences. They valued progress, technology, innovation and, in an odd sort of way, democracy. Theirs was a strangely populist elitism. Useful knowledge, after all, had to apply to someone or something. They sought practical knowledge for evidence-

based policy as they forged a new kind of polity that entailed coming to terms with the Indigenous societies in whose midst they had settled. In any case, to be useful to society remains not a bad goal for applied anthropology.

The discomfort with the label “applied anthropology” expressed in my title may perhaps be provocative for some colleagues, especially those impatient with theory. I intend, however, to evoke reflection rather than irritation or outright dismissal. To state the matter baldly, I am acutely uncomfortable with the term *applied anthropology* primarily because I believe that *all* anthropology is applied. It follows that everything anthropologists do is—or potentially becomes—anthropology. I conclude, therefore, that the applied part must be an oxymoron. How, after all, can we purport to study human life without engaging it? To engage the world inevitably has consequences, whether for good or ill. These consequences, of course, may be either conscious and empathetic or unintended, carelessly playing ideas off against one another as though they could exist in isolation from society and its members. This is my first objection to the term as normally used.

My second objection is that “application” has the potential to become an end in itself, an excuse not to engage with the dynamic debates at the core of our discipline. This is the sense in which *applied* is often opposed to *theoretical*, as though one precluded the other. I argue, in contrast, that each may have value, depending on the circumstances and the question, but that when they enrich one another, the whole becomes greater than its parts. The urgency of the short-term project quite legitimately holds a necessary priority in applied research. But it behooves us to recall that there is also a longer *durée*, requiring ongoing commitment to an issue, a group of people or a set of institutions with an evolving presence in time and space. These things are mutually entailed. Anthropology is at its very heart a comparative discipline in which our case studies, our ethnographies, reciprocally highlight the insights of the particular.

All this may seem rather abstract, more theoretical than applied. Let me turn to some of the projects and preoccupations, many of them interdisciplinary, albeit in a characteristically anthropological way, that underpin my claim to be an applied anthropologist. I cite my personal experience not out of egomania but because I know it best and can thus tease out the underlying threads of motivation and integration. Reflexivity is a powerful tool in the hands of the anthropologist as analyst of both self and society. I have jostled, with varying degrees of success, with linguists, historians, literary

critics, demographers and medical clinicians and researchers. Isaiah Berlin's contrast between the hedgehog, with one great idea, and the fox, who jumps from one idea to another, has long fascinated me. Like most of us, I have experienced multiple moments of deploying both strategies, sometimes simultaneously. My several, mostly sequential, career specializations are, at first glance, suggestive of the flightiness of the fox. Such repositionings have arisen with a recurrent element of serendipity over the course of my career. I have rarely planned to move from this point to that one. The contingency of what I actually ended up doing at any given time has taught me not to project the future in great detail but, rather, to take up each opportunity because it is there, because something needs to be done, I know a little bit about it, and, paraphrasing Charlie Trick, my colleague in Ecosystem Health at The University of Western Ontario, "if I didn't do it, it might not get done." We applied anthropologists have a habit of charging into doing the things that ought to be done and working out the details as we go along.

I argue, however, that what in the moment appears to be a series of happenstances tends to develop over time an underlying logic, a hedgehog-like continuity that, for me, resides in the application of anthropological knowledge. This is what the subtitle of my fourth-year undergraduate theory seminar calls "how to think like an anthropologist," regardless of the subject at hand. It is a lens, a way of seeing the world. Applied anthropology, as I understand it, then, is the glue uniting the larger enterprise that I still prefer to call simply "anthropology." Or perhaps they are coterminous in magnitude but distinguished primarily by the standpoint from which we view our own work at a given conjuncture or in a given context. Application in this context, theory in that one.

There is also, of course, an aesthetic moment, an appreciation of the beauty as well as the truth of seeking and applying knowledge. Sir Isaac Newton epitomizes such a view of science when he says, "I don't know what I may seem to the world, but as to myself, I seem to have been only like a boy playing on the sea-shore and diverting myself in now and then finding a smoother pebble or prettier shell than ordinary whilst the great ocean of truth lay all undiscovered before me" (Partington 1996:494). Similarly, Bruno Latour (1987) portrays the Janus-faces of science, contrasting the fascinating, messy business of doing the work with the much tidier presentation of the results (that so often stifles the transmission of anthropological knowledge in the classroom). The pleasure is in the doing.

From the second, the non-ivory-tower source of my narrative tools for thinking about the world—my fieldwork—the Plains Cree of northern Alberta say, "peyak esa," once upon a time, the culture hero/trickster/creator Wisahketchak was walking—and the most amazing things began to happen. And he co-created the world with those who lived in it. It was not exactly dialogue. Wisahketchak was not forthcoming about what he really thought; indeed, he was (and remains) a creature more of impulse than of thought, so much so that the consequences are often awkward if not fully tragic. The meaning of the cautionary tales about his antics resides in the eye and ear and imagination by which the hearer applies the object lessons of the stories told and retold about the things they say that that one, that Wisahketchak, did and how his *applied* creative energy made the world in the form that we know it today.

The Alberta Years

As I was walking, I found myself in Edmonton in 1969, trained (at least in retrospect) in eerily abstract versions of linguistic anthropology and the history of anthropology, looking for some Indians to study who had a language I could learn. They turned out to be Plains Cree, and they found the city girl from down east endlessly amusing. Things began to happen, and many of them were, by any definition, applied anthropology, albeit without conscious intention or even acknowledgment on my part at the time.

Hanging out with a kindergarten class in a community where most children still came to school speaking only Cree led, in due course, to language revitalization projects with teachers from a dozen northern Alberta communities and preparing community-specific curriculum materials with them. Today I would call this "collaborative anthropology." Language was not yet a political issue in the Harold Cardinal years, so for the most part I worked with women and children pretty much under the radar. In retrospect, that was a blessing.

I especially enjoyed a Cree adaptation of *Sesame Street* (with Barbara Burnaby for Saskatchewan New Start) that incorporated culturally appropriate forms of etiquette as well as direct translation of pedagogical content (Darnell and Vanek 1972). Our sponsors insisted on a script, which I dutifully wrote. But the old man we borrowed as storyteller for some Cree kids from a boarding school in Prince Albert while their parents were on the trapline, blithely ignored it. He confidently told the children he would tell the story again in Cree: "You'll like it better that way." One child declined to draw Wisahketchak because he was the eye through

which the story could be seen—a standpoint theory of access to traditional knowledge, to be sure!

I got mad when I learned that the University of Alberta in 1969 taught Ukrainian but not Cree. So I found some fluent Cree speakers and taught the language and culture alongside them, moving the course over several years from non-credit adult education to an anthropology reading course to a calendar course that I got departmental teaching credit for every second year. Again, it was a collaborative enterprise, with Native students sharing their knowledge and experience and going home on weekends to consult grannies (or occasionally other relatives) whenever we were uncertain about anything. The Cree language program model, developed with the help of several communities in the region, had at least a small part in the establishment of a Faculty of Native Studies at the University of Alberta in 1985. After 15 years, I had finally put myself out of a job, handing over the course to the son of a woman who had been one of my own early Cree language teachers. Capacity-building is a major tenet of applied anthropology.

In those years, I often found myself a mediator with social services on behalf of women trying to keep or reclaim their children, in court as a character reference for language consultants (who were, after all, professors at the university) or providing transportation for collaborators who wanted to visit friends and relatives in more or less nearby communities (“It’s just over there,” they would say, gesturing vaguely, and we were off on another unpredictable excursion). Participant observation as a methodology has a tendency to relegate the “research” part of what anthropologists do to the interstices of the ongoing flow of everyday life. But that’s how you come across the things you’d never have thought to ask about. I learned to say, staring politely into undifferentiated mid-space, “I’ve always wondered about . . .,” while interlocutors acknowledged my wondering. Then I waited until they raised the subject again, often satisfying my curiosity, although sometimes only years later.

Ontario Defamiliarization

When I moved to Ontario in 1990, I had no idea what to expect on the Aboriginal front. But it was axiomatic that I would again seek research and collaboration with local First Nations communities. I wanted to live and work in the same place, as I had been privileged to do in Alberta. More things were familiar than I expected, though others proved new and profoundly local. The co-presence in southwestern Ontario of Anishinaabeg, Lenape and Haudenosaunee traditions and the relative proximity of these communities to urban centres lent an initially peculiar contrastive character to my internal-

ized sensibilities. But by now I had become a storyteller, and I carried stories across Canada as I added new ones. People in southern Ontario wanted to know what things were like out there in the Prairies. Working with language consultants much older than myself, I carried stories of spiritual teachers who were highly respected in my new home. I have chosen not to write about many of the things I learned while facilitating these early revitalization programs, although they have contributed immensely to how I understand things that I do feel authorized to share in public. The ethical stance of non-disclosure is also, I believe, an application of our anthropology.

Discourse and Resource Exploitation

I got mad again, this time because Indians who lived in the city, spoke English and ate pizza were dismissed by academics, the media and the general public alike as assimilated, therefore no longer legitimately Native. My then-colleague Lisa Phillips [Valentine], later Allan McDougall and I spent the next 15 years trying to understand and catalogue the forms of discourse that carried over from traditional languages, mostly Anishinaabemowin (Ojibwe), into English. We documented multiple Indian Englishes that varied in systematic ways from so-called Standard English, ways that arose from both the structures of traditional Native languages and the etiquette underlying their use in interaction across a variety of genres. Cross-cultural miscommunication, too often unrecognized, is a rich and largely untapped field for applied anthropology.

In the course of making explicit why and how the ten thousand or so Native people living in London, Ontario, maintained their sense of identity, I moved gradually from a discourse-centred approach to a more ethnohistorical one, and my fieldwork came to rely increasingly on explicitly collaborative methodologies. Oral tradition presupposes a time dimension for the transmission of traditional knowledge. It constitutes history “from the native point of view,” to use the phrase that formed a recurrent mantra in the writing of Franz Boas.

I have been talking for some time now about what I call “nomadic legacies,” the cultural patterns of relationship between people and resources, particularly land, that developed out of a hunter-gatherer mode of subsistence but persist in contemporary practices of residential mobility (Darnell 1998, 2008, 2011). I argue, contra my erstwhile colleagues in demography, that the numerically stable urban Indigenous population in London is dynamic, reflecting a constant movement of Native individuals and families back and forth between the city—in search of education, employment and social or medical

services—and the Reserve, the home place to which people retain the right to return. I understand mobility in this context as non-random: an effective strategy and a mechanism of community strength, a pattern of (re)-distributing disparately located resources, rather than as an obstacle to citizenship or participation. Such a sustainable pattern of resource exploitation is potentially applicable beyond the bounds of the Aboriginal community.

Because over half the members of a given Reserve community may not be in residence at any given moment does not mean that they have ceased to be active members of that community (though of course some have). “Where are you from?” is the first question in an encounter. This—not “Where do you live now?”—is the first step in establishing a new relationship. My ongoing work in this area integrates nomadic resource exploitation with the flexible and personalized strengths of oral tradition, producing a relational ontology of face-to-face interaction of living beings that conflicts as strongly with the mainstream privileging of literacy as mobility did and does, when settlement is accepted unproblematically as the *sine qua non* of civilization.

Medical Sciences

More than a decade ago now, I was invited to join colleagues in Western’s Schulich School of Medicine and Dentistry in developing a program in ecosystem health that would feature a distinct Aboriginal focus in south-western Ontario. We established a Memorandum of Understanding with Walpole Island First Nation to document the human health effects of pollution from Sarnia’s chemical valley upstream from the community. This partnership remains ongoing across multiple generations of graduate students and faculty. The core personnel (Jack Bend, a toxicologist from Schulich; Charlie Trick, an oceanographer from the Department of Biology; and me, an anthropologist from the Faculty of Social Science) were senior faculty who could afford to invest time, skills and energy in a long-term program. Graduate students and young scholars rarely have this luxury. To draw them into ongoing projects constitutes another variant of applied anthropology through capacity-building. I suppose that all of us who teach do this kind of applied anthropology.

My collaborative work with colleagues in the medical and health sciences has been the most challenging of the fieldwork projects I have tackled over my career. The assumptions of biomedicine do not always blend well with traditional Aboriginal understandings of well-being. Medical practitioners, whether researchers or clinicians, find it difficult to hold in abeyance the entitlement of

privileged access to “truth” acquired along with their professional socialization to medical “science.” I do not intend a critique of particular colleagues. The Ecosystem Health team has come a long way together, and we have all stretched our understandings of what we do and how it relates to those with whom we work, both within and beyond the university. Nonetheless, a gulf remains, and constant vigilance is necessary to maintain an accessible crossing.

Some characteristic sticking points in conceptualizing well-being include the following: (1) Algonquian traditions privilege a time perspective of seven generations in both directions from the speaker. Such a time frame transcends the proximate health status of the individual medical patient and requires placement of the individual within a biographical and social context of family and community. Research projects rarely have the luxury of a longitudinal perspective, of history understood through the perspectives of those who live it. (2) The inclusion in many contexts of plants, animals and the environment more generally on a par with human persons is taken for granted by Native people but often greeted with snorts of impatience from those trained in biomedicine: “Don’t tell me about that stuff. I am only interested in people.” (3) Incorporation of traditional healers in medical practice is increasingly common, but rarely is such practice given the respect of equal validity in a domain of its own. Further, medicine plants are rarely acknowledged by medical personnel for their therapeutic efficacy as attested by community experience. For First Nations consultants, however, efficacy requires establishing a relationship to the medicine plants. This is incomprehensible within the biomedical model of cause and effect. (4) Continued access to traditional foods not contaminated by pollution over which communities have limited control is a high priority. The most common question in public presentations of our research results has been: “How much fish can I feed my family?” The answer requires locally relevant parameters; one must pause to wonder, “How many people will a five-pound fish feed?”—the culturally appropriate answer at Walpole Island First Nation is “one.” Local control of the food supply is paramount. Carrots and potatoes, as well as medicine plants, were described as “traditional” foods when grown in a community garden regardless of their introduction by settlers (Bekeris 2012). (5) Local control of resources in relationship to the environment is also at stake in the parallel established in authoritative discourse between endangered species and language revitalization, illustrated by a Walpole Island First Nation translation of biological and botanical research results into Anishinaabemowin (Ojibwe language) (Darnell 2006,

2007; Jacobs 2006). Our preliminary epidemiological study based on biomonitoring of hair and blood samples for heavy metals, mercury and cortisol (as a measure of stress) combines well with ethnographic investigation of traditional knowledge, given a respectful attention to local protocols. There is enormous potential for synergy in the amalgam of knowledges. (6) Medical colleagues have had trouble acknowledging that blood samples do not bother people who deal matter-of-factly in everyday life with diabetics' needles and the dressing of fish and game, whereas hair, with its capacity for growth, holds the essence of a person and can be used against a person by someone who intends them harm.

The applied anthropology in this series of projects has been twofold: on the one hand, it has proved possible to construct a bridge of sorts between two very different traditions with shared goals of health and well-being—valorizing the local, experiential and longitudinal knowledge of the community alongside the more formal “scientific” methods of biomedicine. On the other hand, the results of such collaboration are available for community use in ongoing land claims and resource management negotiations with federal and provincial governments and industry. (The third hand requires considerable adjustment of medical education. But that is a challenge for another occasion.)

More recently, I was invited to participate in developing Western's new Interfaculty Master of Public Health program with some of the same colleagues but with considerably more extensive institutional resources and infrastructure. (The medical school has resources undreamed of by social science programs.) As the pet social scientist in the program, I sometimes feel quite marginalized. Nonetheless, my cross-appointment and participation have ensured that cultural and social questions remain salient. In 2013–14, my anthropologist colleague Gerald McKinley and I co-taught “Social and Cultural Determinants of Health,” using WHO criteria, and “Aboriginal Health.” The substantial international background of our first cohort facilitated sharing of students' cross-cultural experience as practising health professionals and greatly enriched our case-based pedagogy.

I optimistically conclude that at least part of the culture of the medical school is moving in the direction of a more anthropological appreciation of culture, context and history or time depth. I have had to do some fancy scrambling to learn to speak the medical language, but, so far at least, the response to this applied anthropology has been rewarding both for the Master of Public Health program and for the participants, even though every head in the room still swivels to me whenever

the word *culture* is mentioned. Further, the Aboriginal health prong of the curriculum has been showcased by Western as an important form of institutional “branding” for the nascent program. Both pedagogically and in the development of interdisciplinary and cross-cultural research, this is applied anthropology at its open-ended richest.

The Applied Anthropologist in the Academy

Wisahketchak must have figured out that someone needed to take the university in hand. And since I was there, I found myself applying my ethnographic experience to my workplace. There are good reasons why so many effective administrators have been anthropologists: we know how to attain consensus, depolarize, take account of underlying agendas and motivations, treat our partners with respect and put together a workable plan with others. I consider two bouts as president of Western's Faculty Association, along with work on faculty workload and pay equity studies, the Research Ethics Board, University Strategic Plan Task Force, Board of Governors, and so on, to be part of my applied anthropology. Some of these in-house commitments have been closer to my professional expertise: founding director of First Nations Studies (again dedicated to putting myself out of a job—it only took me three years this time); facilitation of language programs in both Ojibwe and Mohawk; hiring of local cultural and linguistic experts to teach in the interdisciplinary First Nations Studies program; donation of my personal First Nations library to the program on behalf of students who spend their book allowance on groceries. Most of us have done these things or their equivalents. Most of us have also served beyond the university in various professional organizations, building infrastructure for the training of anthropologists and the dissemination of anthropological knowledge. Although universities largely devalue such activities as merely “service,” I am convinced that we apply our professional skills in service to the world around us across the domains of research, teaching and service—with the same activities often contributing simultaneously to all three.

History of Anthropology

History of anthropology has remained a constant thread in the work I have done over the last four-plus decades. But I do it in a different way than when I began, largely because I have learned how important this knowledge can be, politically for communities and individually for friends and collaborators, to transcend boundaries of culture, status, economic or educational background, and so on.

The late George W. Stocking, Jr., who was on my dissertation committee during his single semester at the University of Pennsylvania, is still widely quoted for his unflattering early-career characterization of anthropologists as incapable of historicism, of separating themselves from their own standpoint (Stocking 1968). He did change his mind, gradually, after he joined the anthropology department at Chicago, but the early dichotomy remains for many a convenient straw target. Even then, I self-consciously wrote for an audience in anthropology and a desire to articulate disciplinary history and practice. It seemed to me easier to teach archival methods to anthropologists than to teach historians to think from non-mainstream standpoints.

The dangers of refusing to separate standpoint from research results are considerable, however, when we venture to apply our anthropological knowledge beyond the academy. Mr Justice Allan MacEachern, for example, concluded in the Degamaukw' case that anthropologists could not be "objective" if they followed the ethical imperatives of their professional association, the American Anthropological Association. CASCA did not then, and still does not, have its own code of professional ethics, out of deference to the lack of consensus among divergent positions within the association on the consequences of an advocacy position for our scientific credibility or the potential of "taking sides" to generate conflict with powerful political and economic pressures in fieldwork sites. Both in reading our own history for its applications and cautions in the present and in listening to the positions of others grounded in different relational ontologies, it is my own position that perspective or subjectivity or standpoint, when applied judiciously, becomes an invaluable tool rather than an obstacle. We must educate interdisciplinary colleagues as well as judicial, political and educational institutions.

The Language and Method of Science

Over the past few years, I have been thinking a lot about the need for anthropologists to reclaim the language and prestige of science for our qualitative and ethnographic methodologies and for the theories that arise from them. As an example of what I have in mind here, I have talked about "generic narratives" in which Native speakers, even in English, relate personal experience so that it will resonate effectively with generational, family or community experience (Darnell 1998, 2013). What is unique is less reportable. The stories are not all the same, but the variation is not random either. When one reaches a point where new *types* of stories do not appear, the "sample" is large enough. This is reliability. Then we may turn to distinctive features that explain the variability

among types of "generic narratives" (e.g., gender, both my own and the speaker's, in residential school stories). I understand validity in qualitative research to be attested by internal consistency, historical trajectory, feedback from research collaborators and convergent evidence from as many sources as possible. There is a considerable difference between the merely anecdotal and what literary critic Kenneth Burke (father of anthropologist Eleanor Burke Leacock) called the "representative anecdote," the story that makes it all make sense.

Even among our own colleagues, there are those who do not know how to listen to a carefully chosen story. I once gave an invited lecture in which I used a single narrative to illustrate the organization of traditional stories in Plains Cree (later published as Darnell 1974). The first question, from a senior colleague who should have known better, was, "Is that the only story you've ever heard?" How could one choose a representative story without drawing on a reservoir of shared stories? To identify the proper, the persuasive, story to tell is to capture the generalization embedded in the particular. Such narratives, ideally framed alongside more formal evidence, are the things that persuade, that are remembered, that make a difference in the world.

The Boas Project

Finally, let me turn to the project with which I am most thoroughly preoccupied these days and argue that it too is applied anthropology. I hold a SSHRC Partnership Grant as general editor of *The Franz Boas Papers: Documentary Edition* with the American Philosophical Society (APS), the University of Nebraska Press, the University of Victoria, the Musgamakw Dzawada'enuxw Tribal Council and several descendant community collaborators. This might seem, at first glance, to be a research-for-its-own-sake sort of enterprise. On the contrary, however, this project has tied together disparate threads of practising and applying anthropology over my career: history of anthropology, narrative analysis, oral tradition, language revitalization, residential mobility, resource sustainability, collaborative fieldwork.

Boas was a man of his own times for whom science held paramount value and justified ethical positions that would be utterly unacceptable today. Despite his obvious limitations when evaluated by contemporary standards, however, Boas was an applied anthropologist, although he was other things too. The first volume of the *Franz Boas Papers* stands as the framing document for a revisionist history (and practice) implicit in Boas's stature as public intellectual (Darnell, Hamilton, Hancock and Smith, 2015). The subtitle identifies theory, ethnography

and activism as three arenas in which Boas has been misread by self-interested successors attempting to replace the mentalist elements of his paradigm with a more positivist and objectivist stance (Darnell 2001, Darnell, Hamilton, Hancock and Smith, 2015). The documentary project returns to his original words in professional correspondence, contextualizes them for a new generation and aspires thereby to set the record straight—at least in relation to the contemporary anthropology of the early 21st century.

The Canadian research team (including, at CASCA 2014, Michael Asch [in spirit only, since he was at the last moment unable to be present], Rob Hancock, Sarah Moritz, Brian Noble, Joshua Smith and Peter Stephenson) is augmented by an international advisory board, primarily American and German. Boas crossed national traditions with a vengeance. That he did his fieldwork in Canada has been virtually invisible in Boas scholarship; this in turn has deepened the rift, with a consequent lack of access of the people who produced them to the original documents.

The Boas Papers (APS n.d.a) are currently being digitized by the APS. Both digital repatriation and community capacity-building are fundamental goals of our Aboriginal Advisory Council, designed to advise on the proper treatment and dissemination of culturally sensitive materials. The Boas Project applies endangered language protocols being developed at the APS under the leadership of Tim Powell, director of the nascent Center for Native American and Indigenous Research. By seeking the advice of descendant communities, the APS is breaking new ground for archival stewardship of First Nations and Native American documents in collaboration with communities to interpret and make them accessible to a variety of publics and useful to source communities.

The synergy across interrelated projects, institutions and national traditions is already adding up to more than its constituent parts. I return to the metaphoric non-linear resilience of the rhizome, epitomized by the Crabgrass Collective, with its solid roots in CASCA, a scintillating amalgam of theoretical volatility and pragmatic commitment to applying anthropology in the political sphere broadly defined. We live in interesting times. The Chinese proverb bills this as a curse. But it is also a challenge in which I believe anthropologists of wildly diverse stripes are well situated to intervene, to apply our knowledge. I invite all of you to join me.

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Note

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Thematic Section

Kinship Travel: Relatedness through International Tourism and Travel Networks

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Abstract: While genealogical, or roots tourism, in which people return to an ancestral homeland has been popular for some time, travel to create families is relatively new. These contemporary forms of what we are calling “kinship travel” are the central focus of this issue.

Keywords: kinship, tourism, fertility, adoption, reproductive technologies

The fundamental question we explore in this themed set of articles is: How are travel and kinship inter-related, given the association of kinship with domesticity and a resolutely stable “home,” on the one hand, and of travel with leisure, detachment and “away-ness” on the other hand (Harrison 2003; Hui 2009)? Despite the apparent opposition between travel and kinship, travel is one among the many social, economic and cultural processes that contribute to the diverse ways in which kinship ties and family structures are being formed and sustained in the 21st century. Assisted reproductive technologies offered for cheap in non-western or developing western countries, such as India and the Czech Republic, in addition to new options abroad for transnational adoption, have expanded the possibilities for those who wish to have children, many of whom are in need of technological or legal assistance. Moreover, contemporary travel has expanded the array of reproductive choices and presents new opportunities for cross-border intimacy and non-assisted reproduction, that is, “natural” conception. These contemporary formations are contingent on the movement and mobility of children and adults across national borders in multiple and diverse ways that often entail extensive as well as recurring transnational travel. Material infrastructure of tourism is used, and in new formations of “kinship travel” the ideological underpinnings of tourism as a “journey,” a “spiritual transformation” and a “quest” for tradition, authenticity and alterity are also mobilized (Badone and Roseman 2004; Graburn 1977; MacCannell 1989). In these ways we view international travel and its material and symbolic border-crossings as a contemporary means to produce offspring, multiple categories of progenitors, and relations of relatedness and family.

While genealogical or roots tourism, in which people return to an ancestral homeland, has been popular for some time and has been written about by anthropologists and other scholars, who have focused largely on flows of American tourists to the geographical region of

western Africa (e.g., Bruner 1996; Clarke 2006; Ebron 1999; Handley 2006), organized and commodified forms, systems and networks of travel for the intended purpose of creating families through reproduction (conception, surrogacy and adoption) are relatively new. These contemporary forms of what we are calling “kinship travel” are the central focus of this set of themed articles. Because these recent modes of kinship travel, since about the 1980s, are linked to historical forms of gendered colonial travel and the regulation of miscegenation—for instance, where European women were sent to colonies as brides for colonial men to reproduce the nation and avoid “interbreeding” among European groups—(e.g., Pierard 1971; Stoler 2002), we are compelled to consider the power dynamics of gender, sexuality and nation-building that are at the core of modern travel practices in late capitalism for the purposes of creating socially legitimate and legally recognized kin ties. While not every article explicitly examines the historicized routes and colonial underpinnings of contemporary kinship travel, these histories nonetheless are implicitly recognized and, in turn, contemporary power dynamics specific to localized kinship travel practices are closely examined.

In bringing together genealogical-making events and social relations that take place in disparate parts of the world—the Czech Republic, India, China and Costa Rica—through the common thread of “travel,” as three cultural anthropologists and one sociologist we have produced ethnographic accounts from our respective long-term field sites that as a collective set of articles reveal several timely and important themes.

First, some forms of kinship travel are purposive and rationalized yet unregulated and unpredictable at the same time. Reproductive tourism and adoption tourism require highly organized routes of mobility across national borders to create categories of relatedness, such as “intending parents,” “surrogate mothers,” “adoptive parents,” “biological” mothers and fathers, “donors,” “bicultural” offspring, “adopted” sons and daughters, and various configurations of normative and non-normative families, which involve a multitude of brokers, agents and state officials. Therefore, these not only are a particularly rationalized (although sometimes unregulated) form of travel, but are also dependent on a globalization of markets for reproductive biological substances, babies and baby-making. Reproductive travel to the Czech Republic, for instance, initially relied on the presence of in vitro fertilization (IVF) brokers to bridge these journeys. Spaces of entrepreneurship are opened up, but relations of exploitation are also created within these new commoditized forms of kinship creation, for

example, as gametes are priced at differential values according to national and ethnic-racial origin. Furthermore, the outcomes of the purposive kinship travel are never guaranteed because of the emotional dimensions to kin-making and to the relational aspect of being a tourist versus belonging. In China, for instance, although American parents may logically anticipate a homecoming for their adopted children from China on a return visit, how locals will receive the child, who is American by nationality, is partly an affective response that can be compelled but cannot be regulated.

Second, kinship travel creates new global ties as well as localized differences. North Americans who meet one another at Czech clinics or Chinese Social Welfare Institutes form bonds that may be sustained when they return to North America. At the same time, when children are conceived through assisted reproductive technologies or are adopted into transnational families, cultural legacies often inform or define new differences within families. White couples who adopt Chinese children and white Euro–North American women who have “souvenir babies” in Costa Rica are incorporating these differences. As they struggle to understand cultural differences between “us” and “them,” they are simultaneously imagining and constructing cultural differences, which are ever so highly valued within a broadly cosmopolitan perspective shared by many of the western travellers in question (also see Volkman 2005). Another example is U.S. and Canadian couples undergoing IVF with donated gametes, whose new ties to Central Europe depend on simultaneous notions of cultural difference and similarity. Travel thus “bridges” and, at the same time, creates divides, borders or “friction” between racial, ethnic and national identities and groupings. Furthermore, local traditions concerning relatedness, such as endogamy or matrilocality, are impacted by travel mobilities and reproductive technologies, which may radically alter conventional definitions and formulations of family, maternity and paternity.

Through international travel, motherhood becomes a “global assemblage” (Ong and Collier 2005); drawing on post-structuralist ideas about the ways that, in the context of globalization and neoliberalism, institutions are formulated from multiple entities and determinations that are unstable, shifting and not reducible to a single logic. We suggest that motherhood has become such a product, as manifested in celebrities’ claims to “global motherhood” and their positioning as “global” mothers via their humanitarian adoptions in African countries, for instance (see Shome 2011). Therefore, motherhood might be seen as a shifting, mobile site of new, often highly gendered contestations vis-à-vis the

local, when, for instance, the individual wrests power from communities to champion one culturally embedded notion of family and set of parental rights over another. The tussle over the bodily (breast milk and womb) versus the socio-legal ties (surrogacy contract) of a mother to a child between the Indian surrogates with the foreign genetic mothers, where the foreign women come out ahead to always be the ones to physically depart the country with the newborn baby, is a prime and poignant example. Challenges to normative heterosexual reproduction and the supremacy of “natural” conception (i.e., without use of technological or medical intervention), for instance, enabled by technologies of travel can be both progressive and conservative, allowing same-sex couples and single persons to create families, while at other times upholding romantic heterosexual monoracial monogamy. The articles in this issue explore the multifaceted disjunctures that occur when local notions and practices of kinship confront global organizations, couples and technologies.

Third, kinship travel extends beyond the episodic and relatively short-term events of conception, surrogacy and adoption. Diffuse emotional ties and experiences that are ephemeral but also remain long after the travel is completed underpin kinship travel. Many families formed through transnational adoption or assisted reproduction, or through transnational encounters and holiday romances, may also participate in heritage and roots travel as their children grow older. In turn, journeys of return to homelands reveal how new and old travel routes and practices have served to both sustain and create affective bonds. Another example of the expansive temporal reach of kinship travel can be seen in how affective bonds are sustained over time between Czech hosts and North American guests, when accommodations become a temporary “home” for tourists while they undergo therapy and subsequently longer-term affective and sometimes fictive kin are forged. Quite differently, entire communities along the Caribbean coast in Costa Rica are affected by transnational encounters that result in babies born to tourist mothers who eventually return to their homelands, while local men aspire to one day reconnect with their children abroad and the grandmothers of the transnational bicultural offspring feel a sense of loss. In the context of quests and journeys abroad for medically assisted conception, surrogate progenitors and adopted and bicultural children, tourists are thus more than “temporary strangers,” which in tourism theory and the popular imagination is often the relationship designated to foreign visitors (Hui 2009); they become relatives to local residents, however contested or romanticized. In these

examples, we aim to demonstrate how the analytical focus on kinship travel encourages the recognition of the affective underpinnings of tourism rather than merely the commercial, the liminal and the leisure aspects of such travel. In turn, these affective dimensions point to how overlapping categories of travel, such as tourist, medical patient or visiting relative, and different modes of movement, such as leisure, reproductive technology and returnee travel, are becoming increasingly blurred as “the numbers and varieties of travelers traversing the global expands” (Amit 2007:7). In addition, these diverse types of journeys leave traces and legacies of a sentimentalized “home” in fertility clinics, adoption centres and local households around the world, as prospective parents and family often work to return with a meaningful understanding and bond with the country to which they travelled or, conversely, seek to sever emotional ties all too quickly in the eyes of local social actors, such as surrogate mothers in India and their children and spouses—again pointing to the temporalities of kinship travel.

Finally, kinship travel affects relatedness in sites of both “destination” and “origin.” As transformative a process as tourism can be and is often claimed to be for tourists, as Edward Bruner (1991) stated some years ago, it is also the case that the hosts and “natives” are the ones most often changed by the presence of tourists. Thus, as we have already hinted at above, the scope of reach of the affective consequences of kinship travel, the social impacts of tourism on local communities with regard to legacies of “souvenir babies” and children born out of temporary relations with tourists, is becoming increasingly apparent as more and more places in the world become sites for sexual tourism and transnational intimacies (Constable 2009). In the surrogacy hostels in urban centres in India, where Indian women live to be monitored for the duration of their pregnancies, their spouses and children are not unaffected as they make sacrifices to benefit from “gifts” bestowed by the intending parents. Thus, the surrogacy tourists hold the power to shape the lives of Indian families, not just the woman offering her uterus, and, by extension, to influence the social organization of communities where surrogacy clinics, hostels for the surrogate mothers and other infrastructures have been established (Pande 2010).

Drawing on ethnographic examples from four different locales in different regions of the world, including Central America, Central Europe, South Asia and Asia, this set of articles contributes innovative, fresh insights to an emergent body of scholarship concerned with how processes of travel shape the ways in which kin ties are forged and how kinship shapes the ways in which travel

is practised and takes on new meanings (e.g., Bergmann 2011; Inhorn and Patrizio 2009; Martin 2009; Yngvesson 2003). A brief summary of each of the articles further engages with the themes we have only sketched out here and, in the “Concluding Remarks,” Yasmine Ergas provides provocative ideas and analytical concepts for further exploration of this new trajectory of research and scholarship in anthropology.

Amy Speier’s article “Czech Hosts Creating a ‘Real Home Away from Home’ for North American Fertility Travellers,” is somewhat akin to Pande’s focus on kin labour. Speier utilizes the term *intimate labour* (Boris and Parreñas 2010:1) to frame the intersection of economic transactions and intimate bonds between North American reproductive tourists and Czech hosts. IVF brokers, Czech doctors and hosts engage in intimate labour with North American patients to minimize the economic nature of reproductive travel. This article considers the “home” that is created for North Americans while they are staying in one Moravian *penzion* (bed and breakfast) that has successfully attracted the most business, as testimonials praise its excellent hospitality. The multifaceted relationships between IVF coordinators, North Americans and Czech hosts are viewed through the lens of kinship tourism. As in the case of intended parents who engage in transnational adoption in China, North Americans undergoing IVF in the Czech Republic may form strong affective ties with one another, which constitute new forms of social kinship.

In “Tracing the Red Thread: Chinese–U.S. Transnational Adoption and the Legacies of ‘Home,’” Frayda Cohen touches on the four themes described above. The global routes to transnational adoption in China are well travelled and highly constructed, relying on traditional tourism infrastructures. Yet, in addition, newer organizations, such as adoption travel agencies as well as charitable NGOs that are creating “heritage tours,” have entered the scene. On such heritage tours, parents of adopted Chinese girls purchase traditional souvenirs, such as stuffed pandas and mandarin jackets that, in turn, become commoditized mementos of Chinese ethnic identity.

Cohen reveals the liminal position of adoptees, who are just recently beginning to embark on heritage tours with their families, often begrudgingly. We may consider these Chinese American girls “bridges” to China, who are welcomed with open arms by the Social Welfare Institutes where they spent the first years of their lives before being adopted. Yet, just as they are a bridge, they are also divided, separated, in terms of their relative wealth and ease of travel, from other Chinese girls

who have yet to be adopted. Heritage tours are presented as a way for Chinese adoptees to sustain their Chinese ethnic and cultural roots, yet Cohen witnesses dissonance within these global ties. Globalization has expanded conceptions of “family,” and families with children from China discursively employ global transnational networks that encourage enduring relationships between adoptive families and China as “home.” These families are essential in maintaining this legacy for the largely female adoptees and are increasingly returning “home” for heritage tours, humanitarian projects and birth-parent searches. Marketed as a “time of excitement, wonder, and unpredictable experiences” where “everything is interesting” and your “cherished” child awaits (AdoptShoppe.com n.d.), adoption tourism illustrates the ways in which contemporary notions of kinship are linked to forms of travel in which boundaries between tourism, leisure and social projects are increasingly blurred.¹

Amrita Pande’s article “Blood, Sweat and Dummy Tummies: Kin Labour and Transnational Surrogacy in India” focuses on surrogates in India and prospective parents’ efforts to create and sustain relationships. The travel of these parents from the global north to access the global south reflects traditional routes of mobility within a global tourism market. By engaging in “kin labour,” the actors involved in transnational surrogacy, the “buyers” and “sellers,” are creating global ties with one another. In this ethnography of transnational contractual surrogacy in a small clinic in India, Pande analyzes the kin labour done by the Indian surrogates and the (often international) intended mother to downplay certain anxieties about commodified transactions. Kin labour includes not just the labour of forging ties with the baby but also other kinds of work (forming ties of sisterhood, sending gifts, writing letters) undertaken by surrogates and the intended mothers. At one level, the kin labour performed by the surrogates and the intended mothers sustains relationships beyond contracts and across borders of race, class and nationality. Moreover, the powerfully forged ties between the surrogate and the baby challenge the notion of kinship ties as “natural” and passed on by male blood. At another level, there is inherent poignancy in this form of labour, as it ultimately reifies structural inequalities based on race, class and gender. Kin labour reflects the dual nature of global ties and localized differences that occur in global kinship tourism encounters.

Susan Frohlick examines cases of Euro-American women who bear children out of transnational liaisons with local Costa Rican men in her article “Souvenir

Babies' and Abandoned Homes: Tracking the Reproductive Forces of Tourism." Frohlick traces female reproductive mobilities, as Euro-American females traverse well-worn travellers' routes from the global north to the global south, similar to the routes European women travelled as colonial brides. Frohlick frames the supply and demand of cross-border intimacies between Euro-American women and local men within an international tourism framework, offering a critique of the economic privilege and mobility by which maternity, affective bonds and citizenship are "bought" in tourist economies. She further examines how these practices are subsequently transforming local kin relations. In Caribbean Costa Rica, *souvenir babies* is an idiom that speaks to the apparent commodification of the most treasured and non-pecuniary of consanguineal kin relations through tourism. Frohlick also examines the ways local Costa Rican cultural norms and social processes influence these reproductive practices, which give rise to new forms of stratified reproduction. Ultimately, reproductive mobility is an artifact of unequal privilege and thereby manifests multiple contestations between local and foreign social actors and creates physical spaces in the form of permanent dwellings that remind residents of the absence of children who have left with their foreign mothers to live in the mothers' home countries.

The four articles in this special issue each address global mobilities of Euro-American reproductive, adoptive or intending-parent tourists traversing typical travel routes from north to south, as they head to China, the Czech Republic, India and Costa Rica to build new transnational forms of kinship. At times, these new families challenge traditional notions of kinship, as North Americans emphasize their daughters' Chinese ethnic heritage by engaging in charitable or heritage tourism in China years after their first transnational adoption, and as North Americans take advantage of lower price structures by travelling for anonymous Czech gametes or Indian surrogates. At the same time, these new families often reassert traditional notions of kinship, as Euro-American women engage in cross-border intimacies with Costa Rican men to reproduce "naturally," and as only heterosexual white couples from North America seek to produce a child that resembles them, thus evading the experiences of ethnic difference cherished by those who adopt from China. Thus, we witness the intersections of local differences with new global ties among disparate groups engaged in various forms of kinship travel that include but cannot be reduced to tourism. Global routes and travel networks—a blurring of leisure, labour and migration mobilities—both open up and complicate the

ways human reproduction occurs and the ways families and kin networks are made and understood.

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Notes

- 1 AdoptShoppe.com is a website that sells adoption-related supplies. The language used illustrates the ways in which travel is promoted within the adoption community.

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Section thématique

Le voyage de parenté : La création de liens familiaux par le tourisme international et les réseaux de voyages

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Résumé : Si le tourisme généalogique, ou tourisme des racines, par lequel les gens retournent à une patrie ancestrale, est en vogue depuis un moment déjà, les voyages ayant pour but la création de familles sont relativement nouveaux. Les formes contemporaines de ce que nous appelons « le voyage de parenté » sont le sujet principal de ce volume.

Mots-clés : parenté, tourisme, fertilité, adoption, technologies de reproduction

La question centrale qu'explore notre série d'articles thématiques est la suivante : quels sont les liens entre le voyage et la parenté, sachant que, d'une part, la parenté est associée à la domesticité et à un « chez-soi » résolument stable, et que, d'autre part, le voyage est associé aux loisirs, au détachement et à l'éloignement (Harrison 2003; Hui 2009)? Malgré l'opposition apparente entre voyage et parenté, le voyage constitue l'un des nombreux processus sociaux, économiques et culturels qui contribuent, sous des modes divers, à la formation et au maintien des liens de parenté et des structures familiales au XXI^e siècle. Les technologies de reproduction assistée offertes à bas prix dans les pays non occidentaux ou les pays occidentaux en voie de développement comme l'Inde et la République tchèque, de même que les nouvelles options en matière d'adoption transnationale à l'étranger, ont accru les possibilités de ceux et celles qui souhaitent avoir des enfants, dont plusieurs nécessitent une assistance technique ou juridique. En outre, le voyage contemporain a élargi l'éventail des choix reproductifs, offrant de nouvelles possibilités de relations intimes transfrontalières et de reproduction non assistée, c'est-à-dire de conception « naturelle ». Ces formations contemporaines procèdent de la circulation et de la mobilité d'enfants et d'adultes à travers les frontières nationales, selon des modalités multiples et variées qui généralement impliquent des déplacements transnationaux prolongés et répétés. L'infrastructure matérielle du tourisme est utilisée, mais aussi mobilisée dans de nouvelles formes de « voyage de parenté » qui constituent les fondements idéologiques du tourisme conçu comme « parcours », « transformation spirituelle » ou « quête » de tradition, d'authenticité et d'altérité (Badone et Roseman 2004; Graburn 1977; MacCannell 1989). Ces fondements sont à la fois le produit et la source de traversées de frontières visant à produire une descendance, de multiples catégories de progéniteurs, des relations de parenté, et de la famille.

Si le tourisme généalogique ou des racines, par lequel les gens retournent à une patrie ancestrale, est à la mode depuis un moment déjà, et a été étudié par des anthropologues et autres chercheurs qui se sont penchés essentiellement sur les flux de touristes américains dans la région géographique de l'Afrique de l'Ouest (voir par exemple Bruner 1996; Clarke 2006; Ebron 1999; Handley 2006), les formes, systèmes et réseaux de voyages organisés et marchandisés ayant pour but de créer des familles par la reproduction (conception, maternité de substitution et adoption) sont relativement nouveaux. Ces formes contemporaines de ce que nous appelons « voyage de parenté » sont au cœur de cette série d'articles thématiques.

Parce que les modalités récentes du voyage de parenté sont liées, depuis les années 1980 environ, à des formes historiques de voyages coloniaux genrés et de régulation des rapports interraciaux – les femmes européennes étant par exemple envoyées aux colonies pour épouser des colons, et ainsi reproduire la nation et éviter les « croisements » entre groupes européens (voir par exemple Pierard 1971; Stoler 2002) – il nous faut prendre en compte les dynamiques de pouvoir fondées sur le genre, la sexualité et la construction nationale qui sont au cœur de pratiques de voyage dont le but est de créer, à l'ère du capitalisme tardif, des liens de parenté socialement légitimes et légalement reconnus. Bien que les articles réunis ici n'étudient pas tous de façon explicite les routes historiques et les fondements coloniaux du voyage de parenté contemporain, ces histoires sont néanmoins implicitement reconnues, et les dynamiques de pouvoir aujourd'hui propres aux pratiques situées du voyage de parenté sont, à leur tour, examinées en détail.

En rassemblant autour du fil conducteur « voyage » des événements producteurs de généalogie et des relations sociales ayant cours dans différentes parties du monde – la République tchèque, l'Inde, la Chine et le Costa Rica – les trois anthropologues culturels et la sociologue que nous sommes avons réalisé, à partir de nos longs terrains de recherche respectifs, des comptes rendus ethnographiques qui mettent au jour, par cette série d'articles, plusieurs thèmes d'actualité importants.

En premier lieu, il apparaît que certains types de voyage de parenté sont ciblés et rationalisés, sans toutefois être prévisibles ou réglementés. Le tourisme procréatif et le tourisme adoptif requièrent des parcours de mobilité hautement organisés à travers les frontières nationales pour créer des catégories de parenté telles que « parents intentionnels », « mères porteuses », « parents adoptifs », mères et pères « biologiques », « donneurs », progéniture « biculturelle », fils et filles « adoptés », ainsi que diverses configurations de familles

normatives et non normatives impliquant une multitude d'intermédiaires, d'agents et de fonctionnaires de l'État. Par conséquent, ces types de tourisme ne constituent pas seulement une forme particulièrement rationalisée (sans être toujours réglementée) de voyage; ils dépendent également de la mondialisation des marchés de matières biologiques reproductives, de bébés et de production de bébés. Le tourisme procréatif en République tchèque, par exemple, s'est initialement appuyé sur la présence d'agents intermédiaires pour faciliter les passages. Si des espaces d'entrepreneuriat se sont ouverts, la marchandisation des modes de création de la parenté a également conduit à de nouvelles relations d'exploitation; ainsi, les gamètes se voient attribuer une valeur différente en fonction de l'origine nationale et ethno-raciale du donneur ou de la mère porteuse. En outre, l'issue d'un voyage de parenté ciblé n'est jamais garantie, et ce, en raison de la dimension émotionnelle propre à la production de parenté et de l'aspect relationnel inhérent au fait d'être touriste ou d'appartenir au lieu. Par exemple, bien que les parents américains peuvent logiquement anticiper un retour aux sources pour leurs enfants adoptés en Chine, la façon dont les habitants de ce pays accueilleront l'enfant – qui est de nationalité américaine – constitue une réponse en partie affective qui peut être imposée, mais pas réglementée.

En deuxième lieu, les voyages de parenté créent de nouveaux liens mondiaux en même temps que des différences situées. Les Nord-Américains qui font connaissance dans des cliniques tchèques ou dans des organismes de protection sociale chinois nouent des liens qui pourront être entretenus à leur retour en Amérique du Nord. Parallèlement, lorsque des enfants sont conçus avec des technologies de procréation assistée ou adoptés au sein de familles transnationales, de nouvelles différences sont élaborées ou définies dans les familles sur la base des patrimoines culturels. C'est le cas, par exemple, de couples blancs qui adoptent des enfants chinois ou de femmes blanches euro-américaines qui font des « bébés souvenirs » au Costa Rica : alors même qu'ils cherchent à comprendre les différences culturelles entre « eux » et « nous », ils imaginent et construisent simultanément des différences, d'autant plus que celles-ci sont hautement valorisées dans la perspective généralement cosmopolite que partagent nombre de ces voyageurs occidentaux (voir aussi Volkman 2005). Un autre exemple est celui de couples américains et canadiens ayant subi une fécondation in vitro (FIV) grâce à un don de gamètes, et dont les liens nouvellement établis avec l'Europe centrale reposent sur des notions simultanées de différence et de similitude culturelle. Les voyages créent ainsi des « ponts » en même temps que des clivages, des frontiè-

res ou de la « friction » entre des identités et des groupes raciaux, ethniques et nationaux. En outre, les traditions locales en matière de parenté, telles que l'endogamie ou la matrifocalité, sont ébranlées par les mobilités et les technologies de reproduction, ce qui peut radicalement altérer les définitions et les formulations classiques de la « famille », de la maternité et de la paternité.

La maternité devient donc, par l'entremise des voyages internationaux, un « assemblage mondial » (Ong et Collier 2005). Dans le contexte de la mondialisation, les institutions se voient formulées sur la base d'entités et de déterminations multiples, instables, changeantes, et irréductibles à une seule et même logique. Un tel assemblage se manifeste par exemple lorsque des célébrités blanches se revendiquent d'une « maternité mondiale » de par leurs adoptions humanitaires dans les pays africains (voir Shome 2011). La maternité peut ainsi être considérée comme un terrain mouvant pour de nouvelles contestations, souvent hautement genrées, du local, comme lorsque l'individu arrache le pouvoir aux communautés afin de faire valoir une conception culturellement située de la famille et des droits parentaux sur une autre. Un exemple frappant et poignant en est le bras de fer qui oppose les mères porteuses indiennes aux mères génétiques étrangères autour des liens corporels (lait maternel et utérus) ou sociojuridiques (contrat de grossesse) qui unissent une mère à un enfant, un bras de fer que les mères génétiques remportent toujours en quittant physiquement le pays avec le nouveau-né. Ainsi, les remises en cause de la reproduction hétérosexuelle normative et de l'hégémonie de la conception « naturelle » (à savoir sans intervention technologique ou médicale) que facilitent les technologies de voyage peuvent être progressistes ou conservatrices, permettant parfois aux célibataires et aux couples de même sexe de fonder des familles, ou alors renforçant la monogamie hétérosexuelle, monoraciale et romantique. Les articles de ce numéro explorent les disjonctions multiformes qui se produisent lorsque des notions et des pratiques locales de parenté sont confrontées à des organisations, des couples et des technologies à échelle mondiale.

En troisième lieu, la temporalité du voyage de parenté s'étend bien au-delà des événements épisodiques et relativement courts que sont la conception, la maternité de substitution, et l'adoption. Le voyage de parenté est sous-tendu par des liens émotionnels diffus et des expériences éphémères qui laissent pourtant des traces longtemps après la fin du parcours. De nombreuses familles formées par l'entremise de l'adoption transnationale, la reproduction assistée, ou les rencontres trans-

nationales et les idylles de vacances peuvent aussi participer au tourisme de la mémoire ou des racines une fois que leurs enfants ont commencé à grandir. Les voyages de retour au pays d'origine révèlent, à leur tour, combien les pratiques et les itinéraires de voyages anciens et nouveaux ont permis de créer et d'entretenir des liens affectifs. La vaste portée temporelle du voyage de parenté se manifeste également dans la façon dont sont entretenus au fil du temps les liens affectifs entre les hôtes tchèques et leurs invités nord-américains, lorsque les lieux d'hébergement deviennent un « chez-soi » temporaire pour touristes sous traitement, et que des liens de parenté affectifs et parfois fictifs se nouent ensuite sur le long terme. De façon différente, des communautés entières le long de la côte des Caraïbes au Costa Rica se voient bouleversées par des rencontres transnationales qui donnent naissance à des bébés dont les mères touristes finiront par regagner leur pays d'origine, tandis que les hommes locaux aspireront à renouer un jour avec leurs enfants vivant à l'étranger, et que les grands-mères de la progéniture biculturelle transnationale vivront un sentiment de perte. Ainsi, dans le cadre de leurs voyages à l'étranger en quête de procréation médicalement assistée, de parents de substitution, ou d'enfants adoptés et biculturels, les touristes sont plus que des « étrangers temporaires » – ce qui, dans la théorie du tourisme et l'imagination populaire, est la position assignée aux visiteurs étrangers (Hui 2009). Ces touristes, qu'ils soient critiqués ou sentimentalisés, deviennent les parents de résidents locaux. À travers ces exemples, nous cherchons à démontrer que l'accent analytique sur le « voyage de parenté » favorise la reconnaissance des fondements affectifs du tourisme, et non pas seulement les dimensions commerciales, liminales ou récréatives de celui-ci. Ces dimensions affectives révèlent, à leur tour, que les catégories enchevêtrées de voyageurs – touriste, patient ou parent en visite – ou de tourisme – récréatif, procréatif ou de retour – deviennent de plus en plus floues au fur et à mesure qu'augmentent le nombre et la diversité des voyageurs parcourant le monde (Amit 2007:7). Par ailleurs, ces différents types de parcours laissent des traces et l'héritage d'un « chez-soi » sentimentalisé dans des cliniques de fertilité, des centres d'adoption et des maisons locales à travers le monde, ce qui conduit souvent les parents éventuels et les familles à retourner au pays qu'ils ont visité enrichis d'une compréhension et d'un lien significatifs avec celui-ci. À l'inverse, ils peuvent chercher à rompre les liens émotionnels, et ce, de façon beaucoup trop rapide aux yeux des acteurs sociaux locaux, tels que les mères porteuses indiennes, leurs enfants et leurs

conjoint. Tout ceci renvoie une fois de plus aux temporalités du voyage de parenté.

Enfin, le voyage de parenté a un impact sur les relations familiales, dans les lieux de « destination » comme dans les lieux « d'origine ». Aussi transformateur que puisse être le tourisme pour les touristes – tel qu'on le prétend souvent, et que Bruner (1991) l'a affirmé il y a quelques années – il faut également reconnaître que les hôtes et les « autochtones » sont souvent les plus bouleversés par la présence de ces derniers. Ainsi, comme nous l'avons déjà laissé entendre plus haut, la portée des conséquences affectives du voyage de parenté de même que les impacts sociaux que laissent sur les communautés locales les « bébés souvenirs » et les enfants nés de relations temporaires avec des touristes sont de plus en plus évidents à mesure que de nouveaux endroits du monde se transforment en lieux de tourisme sexuel et de relations intimes transnationales (Constable 2009). Lorsque, dans les foyers de maternité des centres urbains de l'Inde, des femmes indiennes résident pour y être surveillées pendant toute la durée de leur grossesse, les conjoints et les enfants de ces dernières sont eux aussi touchés, puisqu'ils se sacrifient pour pouvoir bénéficier des « cadeaux » qu'accordent les parents intentionnels. Ceux et celles qui s'adonnent au tourisme procréatif ont ainsi le pouvoir de façonner la vie de familles indiennes – pas uniquement celle de la femme qui offre son utérus – et, par extension, d'influencer l'organisation sociale de communautés où des cliniques de procréation médicalement assistée, des foyers pour mères porteuses et d'autres infrastructures ont été établies (Pande 2010).

À partir d'exemples tirés de quatre terrains ethnographiques dans différentes régions du monde, soit l'Amérique centrale, l'Europe centrale, l'Asie du Sud et l'Asie, cette série d'articles apporte des perspectives nouvelles à une littérature émergente qui porte sur la façon dont les voyages contribuent aux modes de création des liens de parenté, et dont la parenté influence sur les pratiques de voyage et les nouvelles significations que revêt celui-ci (voir par exemple Bergmann 2011; Inhorn et Patrizio 2009; Martin 2009; Yngvesson 2003). Un bref résumé de chacun des articles approfondira les thèmes que nous venons d'esquisser, et, pour conclure, Yasmine Ergas proposera des idées innovantes ainsi que des concepts analytiques permettant une exploration plus poussée de cette nouvelle piste de recherche en anthropologie.

L'article d'Amy Speier « Czech Hosts Creating a 'Real Home Away from Home' for North American Fertility Travellers » fait écho à l'intérêt de Pande pour

le « travail de parenté ». Speier emploie le terme « travail intime » (Boris et Parreñas 2010:1) pour cerner l'intersection entre les transactions économiques et les liens intimes qui se développent entre les hôtes tchèques et les touristes nord-américains qui désirent procréer. Les agents intermédiaires, les médecins et les hôtes tchèques s'engagent dans un travail intime avec les patients nord-américains afin de minimiser la nature économique du tourisme procréatif. Cet article étudie le « chez-soi » créé pour ces patients lors de leur séjour dans la *penzion* (maison d'hôte) morave devenue la plus prospère du fait de témoignages vantant son excellent accueil. Les relations multiformes entre agents intermédiaires, Nord-Américains et hôtes tchèques sont considérées à travers le prisme du tourisme de parenté. Tout comme les parents intentionnels qui s'adonnent à l'adoption transnationale en Chine, les Nord-Américains qui subissent une FIV en République tchèque peuvent nouer de solides liens affectifs entre eux, constituant ainsi de nouvelles formes de parenté sociale.

Dans « Tracing the Red Thread: Chinese-US Transnational Adoption and the Legacies of 'Home' », Frayda Cohen aborde les quatre thèmes décrits plus haut. Les routes mondiales qui donnent accès à l'adoption transnationale en Chine sont fréquemment empruntées et hautement organisées, s'appuyant sur les infrastructures touristiques traditionnelles. Or des organisations plus récentes, telles que des ONG caritatives et des agences de voyages proposant du tourisme adoptif, sont également entrées en scène en créant des « circuits patrimoniaux ». Au cours de ces circuits, les parents de jeunes Chinoises adoptées achètent des souvenirs traditionnels, comme des pandas en peluche ou des vestes à col Mao, qui deviennent, à leur tour, des souvenirs marchandisés de l'identité ethnique chinoise.

Cohen met au jour la position liminale de ces adoptées qui commencent depuis peu à effectuer, souvent à contrecœur, des « circuits patrimoniaux » avec leurs familles. Ces jeunes Sino-Américaines peuvent être considérées comme des « ponts » vers la Chine, où elles sont accueillies à bras ouverts par les institutions de protection sociale dans lesquelles elles ont passé les premières années de leur vie, avant d'être adoptées. Et pourtant, si elles font office de pont, elles se trouvent aussi séparées, du fait de leur richesse relative et de leur facilité à voyager, d'autres filles chinoises qui n'ont pas encore été adoptées. Si les circuits patrimoniaux sont présentés comme un moyen pour les adoptées chinoises de nourrir leurs racines ethniques et culturelles, Cohen est témoin de dissonances au sein de ces liens mondiaux. La mondialisation a élargi les conceptions de

la « famille », et les familles avec des enfants nées en Chine empruntent discursivement des réseaux transnationaux mondiaux qui favorisent les relations durables entre les familles adoptives et la Chine imaginée comme « chez-soi ». Ces familles sont essentielles au maintien de l'héritage culturel des adoptées (des filles pour la plupart), et sont de plus en plus nombreuses à revenir à ce « chez-soi » dans le cadre de circuits patrimoniaux, de projets humanitaires ou de recherches de parents biologiques. Commercialisé en tant « qu'aventure familiale » vers un « monde lointain » où vous attend votre « précieux cadeau » (AdoptShoppe.com n.d.), le tourisme adoptif illustre la façon dont les notions contemporaines de parenté s'articulent à des formes de voyage dans lesquelles les frontières entre tourisme, loisirs et projets sociaux sont de plus en plus floues.

L'article de Amrita Pande « Blood, Sweat and Dummy Tummies: Kin Labour and Transnational Surrogacy in India » porte sur les efforts des mères porteuses indiennes et des parents éventuels pour créer et entretenir des relations. Le voyage qui conduit ces parents du Nord au Sud reflète les trajectoires de mobilité traditionnelles au sein du marché mondial du tourisme. Par ailleurs, en s'engageant dans un « travail de parenté », les acteurs impliqués dans la maternité de substitution transnationale – les « acheteurs » et les « vendeurs » – tissent des liens mondiaux entre eux. Dans son ethnographie de la maternité de substitution contractuelle transnationale ayant cours dans une petite clinique en Inde, Pande analyse le « travail de parenté » qu'effectuent les mères porteuses indiennes et les mères intentionnelles (souvent internationales) pour minimiser certaines inquiétudes relatives aux transactions marchandisées. Le travail de parenté comprend non seulement le tissage de liens avec le bébé, mais aussi d'autres formes de travail (la création de liens entre femmes, l'envoi de cadeaux, la correspondance) entrepris par les mères porteuses et les mères intentionnelles. D'un côté, le travail de parenté réalisé par ces femmes entretient des relations qui vont au-delà des contrats et qui traversent les frontières de race, de classe et de nationalité. Par ailleurs, les liens puissants forgés entre la mère porteuse et le bébé remettent en cause l'idée que les liens de parenté sont « naturels » et transmis par l'homme. D'un autre côté, ce type de travail a quelque chose d'essentiellement poignant, car il finit toujours par réifier les inégalités structurelles fondées sur la race, la classe et le genre. « Le travail de parenté » reflète la double nature des liens globaux et des différences situées qui sont produites lors de rencontres mondiales facilitées par le tourisme de parenté.

Susan Frohlick examine, dans son article « 'Souvenir Babies' and Abandoned Homes: Tracking the Reproductive Forces of Tourism » le cas de femmes euro-américaines qui ont des enfants issus de liaisons transnationales avec des hommes costaricains. Frohlick retrace les mobilités reproductives féminines par lesquelles des femmes euro-américaines parcourent les routes déjà bien fréquentées qui mènent du Nord au Sud, et qui sont semblables à celles que les femmes européennes empruntaient à titre d'épouses de colons. Frohlick resitue l'offre et la demande de relations intimes transfrontalières entre femmes euro-américaines et hommes locaux dans le contexte du tourisme international, proposant une critique du privilège économique et de la mobilité qui permettent, dans les économies touristiques, « l'achat » de la maternité, des liens affectifs et de la citoyenneté. Elle examine également comment ces pratiques transforment ultérieurement les relations de parenté locales. Sur la côte caribéenne du Costa Rica, l'expression « bébé souvenir » renvoie à l'apparente marchandisation du plus précieux et du moins pécuniaire des liens de parenté consanguins par le tourisme. En outre, Frohlick étudie comment les normes culturelles et les processus sociaux locaux influent sur ces pratiques reproductives, donnant naissance à de nouvelles formes de reproduction stratifiée. En dernière instance, la mobilité reproductive est un artéfact du privilège inégal ; elle constitue de ce fait le terrain de multiples contestations entre des acteurs sociaux locaux et étrangers. Elle engendre des espaces physiques, sous la forme de maisons permanentes, qui rappellent aux résidents l'absence de ces enfants partis avec leurs mères étrangères pour vivre dans le pays d'origine de celles-ci.

Chacun des articles de ce numéro spécial se penche sur les mobilités mondiales de parents intentionnels euro-américains qui pratiquent le tourisme procréatif ou adoptif, empruntant les routes Nord-Sud classiques pour se rendre en Chine, en République tchèque, en Inde et au Costa Rica afin de construire de nouvelles formes de parenté transnationales. Parfois, ces nouvelles familles remettent en cause les notions traditionnelles de parenté. C'est le cas de ces Nord-Américains qui accentuent le patrimoine ethnique de leurs filles chinoises en s'adonnant au tourisme humanitaire ou patrimonial en Chine plusieurs années après leur première adoption transnationale, ou de ces autres qui voyagent en quête de gamètes tchèques anonymes ou de mères porteuses indiennes pour profiter des prix inférieurs en vigueur. Parallèlement, ces nouvelles familles réaffirment souvent les notions traditionnelles de parenté. Ainsi, des femmes euro-américaines s'engagent dans

des relations intimes transfrontalières avec des hommes costaricains afin de se reproduire « naturellement », ou alors des couples nord-américains exclusivement blancs et hétérosexuels cherchent à faire un enfant qui leur ressemble, évitant ainsi l'expérience de la différence ethnique prise par ceux et celles qui adoptent en Chine. De ce fait, nous assistons à des croisements entre les différences locales et les nouveaux liens mondiaux qui se tissent entre des groupes disparates engagés dans diverses formes de voyage de parenté, lesquelles incluent, mais ne peuvent être réduites au tourisme. Les routes et réseaux de voyage mondiaux – où s'entremêlent les mobilités de loisir, de travail et de migration – élargissent et rendent plus complexes à la fois les modes de reproduction humaine ainsi que la façon dont les familles et les réseaux de parenté sont fabriqués et appréhendés.

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Czech Hosts Creating “a Real Home Away from Home” for North American Fertility Travellers

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Abstract: North American reproductive travel to the Czech Republic for in vitro fertilization (IVF) is kinship tourism—since it offers possibilities for creating a family. I turn attention to the intimate labour performed by IVF brokers, Czech doctors and hosts—who create a “home” for North Americans while they are in the Czech Republic. Also, North Americans who meet one another in the Czech Republic form bonds of social kinship. It becomes apparent how tourism processes profoundly shape kinship while at the same time relatedness shapes travel.

Keywords: reproductive kinship, tourism, intimate labour, in vitro fertilization, broker

Résumé : Les voyages de Nord-Américains vers la République tchèque ayant pour objectif la reproduction par fécondation in vitro (FIV) constituent du tourisme de parenté – puisqu’ils offrent des possibilités de créer une famille. Je m’intéresse au « travail intime » accompli par les courtiers en FIV, les médecins et les hôtes tchèques – qui créent une « maison » pour les Nord-Américains pendant qu’ils séjournent en République tchèque. De même, les Nord-Américains qui se rencontrent en République tchèque forment des liens de parenté sociale. L’étude révèle comment le tourisme modèle en profondeur la parenté, alors que parallèlement, les liens de parenté donnent forme au tourisme.

Mots-clés : reproduction, parenté, tourisme, travail intime, fécondation in vitro, courtier

Introduction

We must consider cross-border reproductive care (CBRC) a form of kinship tourism since it gives North Americans new possibilities for creating a family through the structures of organized travel. Global markets of baby-making have opened up as in vitro fertilization (IVF) brokers create new travel routes between North American towns and cities and small towns in the Czech Republic. IVF brokers are Czech American couples who are entrepreneurs who help couples gain access to assisted reproductive technologies (ARTs) using readily available egg donation in the Czech Republic. Kinship travel is a lens that encourages us to recognize the affective underpinnings of tourism rather than merely the commercial, liminal or leisure aspects. This article links intimacy to political-economic structures of global tourism (Cabezas 2011:3).

This article considers the affective nature of reproductive travel that informs and contextualizes North American travel to the Czech Republic for IVF. This article examines the “intimate labour” embedded within CBRC, the labour of family, IVF brokers, Czech hosts and clinics. Boris and Parreñas have used intimate labour as a lens to examine the “intersection of money and intimacy in everyday life” (2010:1). The circulation of people and technologies within CBRC encourages new forms of intimate labour enacted by Czech hosts. Key components of intimate labour are the attentiveness of the brokers and, in this case, “shared secrets subject to market forces in a neoliberal system” (9). These secrets are the intimate knowledge shared between infertile couples and IVF brokers, the “work that involves embodied and affective interactions in the service of social reproduction” (7). Intimate labour offers a way to understand how care, kinship work and economic transactions must be considered in tandem.

There are various ways in which intimate labour is expressed and managed in the case of CBRC, but I turn attention to the intimate labour performed by IVF

brokers, Czech doctors and the hosts, who create a “home” for North Americans while they are in the Czech Republic. These are not the only affective relations within these assemblages of baby-making, however. The relationships that are created between North Americans embarking on this journey (Speier 2011) are new types of relatedness sustained through couples encountering one another on their global route to parenthood. North Americans who meet one another in the Czech Republic form bonds of social kinship that are sustained upon returning home. The relationships between North American IVF brokers, reproductive travellers and Czech hosts will be considered within the idiom of kinship, family and home as intimate transnational bonds are expressed, experienced and understood as social kinship. As I will show in my exploration of these new relationships, tourism and travel processes profoundly shape kinship and relatedness while at the same time kinship and relatedness shape travel and tourism.

Methods

This research is based on a multisite ethnographic project¹ conducted in North America and the Czech Republic over the past five years. During the summers of 2008 and 2010, I met and interviewed the owners of the IVF broker companies, which I refer to as IVF Holiday and IVF Choices. These companies work with two separate clinics in the eastern Czech Republic. IVF Choices is based in Atlanta, Georgia. This owner, Petra, works with a clinic in Brno, Czech Republic. IVF Holiday is based in Ohio and works with a clinic in Zlín.

Anthropologists (see Inhorn 2004; Whittaker and Speier 2010) have discussed the difficulty of gaining access to infertile couples, especially those who travel abroad seeking services. The anthropologist must rely on the clinic as well as IVF brokers, therefore, as the entry point/gatekeepers to the first set of patient–client participants. The two brokers provided me with initial contacts with former clients, Czech coordinators and clinic staff—including nurses and doctors—and sites of patient accommodation in the Czech Republic. Both IVF Holiday and IVF Choices sent out a survey to past clients asking about their reproductive travels.

During the summers of 2010 and 2011, I travelled to the Czech Republic, living in Zlín and Brno. Three quarters of my time was spent in Zlín, where I had easier access to reproductive travellers, and one quarter in Brno, where I conducted participant observation at the fertility clinics and *penzion* (bed and breakfast) and spoke with North Americans I met in the Czech Republic. In 2012, I followed up with 19 couples in different towns and cities throughout North America to conduct life his-

tories. This article is based on 30 surveys, 47 interviews, participant observation field notes and 19 life histories that have been conducted with patients, brokers, coordinators and reproductive specialists. Each person I spoke with signed an informed consent form before my taping of the life history interview. I manually coded all transcripts and field notes, closely reading and interpreting them for patterns. Pseudonyms have been used for all informants.

CBRC

The Centers for Disease Control and Prevention in the United States estimate that 11 percent of women aged 15–44 suffer from impaired fertility (2015). In 2006–2010, 13 per cent, or 5.1 million women aged 25–44, had used medical help to get pregnant (CDC 2014). However, price acts as a severe constraint on what professor Debora Spar has characterized as a “constant” demand for ARTs (2006:31). The U.S. fertility medical trade has been referred to as the “baby business,” since it is a largely unregulated, for-profit endeavour (Spar 2006:49). Because of the high profit and endless demand for services, North American clinics have little incentive to reduce their prices. Thus, the North American fertility market is “punctuated by inequities” (Spar 2006:96). “The single biggest problem with reproductive technologies in the U.S.... is a lack of access to health care based on need” (Thompson 2005:27).

CBRC, what Briggs (2010:51) has referred to as “offshore (re)production,” has grown into one of the main forms of medical travel owing to the high cost of infertility treatment, as in the United States (Spar 2006; Thompson 2005); strict regulatory laws, as in Italy (Zanini 2011); or a lack of general access to biomedical technologies, as in Nigeria (Pennings 2002). The Czech Republic is considered one of the top European destinations for affordable IVF using egg donation. Destination sites of fertility travel have evolved through a combination of sophisticated medical infrastructure and expertise, particular regulatory frameworks and lower wage structures, which allow reproductive technologies to be performed at competitive, lower costs than in other countries. Cultural familiarity, regulatory boundaries and the availability of services such as sex selection, surrogacy or commercial ova donation are also important (Blyth and Farrand 2005). Reproductive tourists travelling to the Czech Republic are seeking “white” babies from Czech egg or sperm donors (see also Kahn 2000:132; Nahman 2008). Others have written about the moral panic in the United States around race (Nash 2003), which also directs women toward egg donors promising a particular phenotype.

Largely as a result of CBRC, the Czech Republic has witnessed a boom in the field of assisted reproduction and has seen the growth of 41 mostly private clinics scattered across the nation, some nestled in border towns near Austria and Germany, most situated in urban centers, and others in university towns with easy access to student donors (Stop Neplodnosti 2014). Clinics that treat foreign patients are privately owned, and there are several overlapping networks among Czech clinics. One network in particular, IVF Europe, collaborates with seven clinics across the Czech Republic. The website boasts that these seven clinics perform one fourth of all IVF cycles in the country, and clients come from all over Europe, mainly Germany, Austria, Italy, France and the United Kingdom, and a fraction come from Israel and North America (IVF Europe 2010). This network includes the clinics in Zlín and Brno, where most North Americans are treated. Czech clinic websites advertise in English, German, Italian and Russian, stressing the ready availability of student ova donors with only a three-month waiting period. The Czech reproductive medical field is profiting from its lower price structure and liberal legislation stipulating that sperm and oocyte donation must be voluntary, gratuitous and anonymous. Donors cannot be paid, but are offered attractive “compensatory payments” of approximately 15,000 Czech crowns (CAN\$800) or 1,000 euros (CAN\$1,400) for the discomfort involved in ovarian stimulation and oocyte retrieval. For North American patients travelling to the Czech Republic, treatment of IVF is CAN\$3,110, and for an egg donor cycle the cost is CAN\$4,150, compared to CAN\$10,500 to CAN\$42,000 in the United States. North Americans spend on average CAN\$10,500 for the entire trip to the Czech Republic.

One main reason Americans travel to the Czech Republic, in addition to the lower cost structure and liberal legislation, is that two entrepreneurial individuals have created IVF broker agencies. These Internet businesses reveal that attentiveness toward patients “does not necessarily entail face-to-face interactions” (Boris and Parreñas 2010:4). North American web-based brokers act as the go-between for the patient and the Czech clinic; they help arrange travel itineraries, provide transportation to and from as well as within the country, and can translate when needed in a variety of settings. These brokers have Czech employees assist the patients during their stay in the Czech Republic. More recently, Czech clinics have begun to staff their own English-speaking coordinators, who may work directly with the patients or with the brokers. These coordinators, fluent in English, organize patients’ schedules, meet them before their

appointments and can offer suggestions and discounts on local services.

IVF Brokers

The IVF broker companies are owned by Czech American couples who have suffered infertility. They utilize their experience as a way to express their “attentiveness” and understanding of North Americans experiencing infertility and unable to afford treatment in the United States. Hana, owner of IVF Holiday, and Petra, owner of IVF Choices, both encountered the high cost and profit motives of American fertility medicine and decided to be “return reproductive tourists” to the Czech Republic (Inhorn 2011). As they journeyed home and realized how much more affordable Czech treatment options were, they decided to help other couples. However, these brokers are companies that are seeking profit. In their intimate labour, “workers align their emotions, bodies, and behavior to the goal of profit making” (Ducey 2010:24). More importantly, however, since they have suffered infertility, they are privy to the intimate bodily secrets embedded in the suffering of their clients (Boris and Parreñas 2010:7).

These brokers “assert the primacy of affective relationships in their trade ... to reassert a discourse of nurture within the commercial relationship” (Whittaker and Speier 2010:364). Using the frame of intimate labour allows for an understanding of the ways individual, private companies are taking on the care and responsibility of reproductive travellers, and we see how “empathy [is] a very important part of the work” (Vora 2010:43). Petra underwent 12 cycles of IVF in the Czech Republic before she finally became pregnant. Her intimate labour was too burdensome to handle alone, as she was suffering her own infertility. Hence, she hired Czech coordinators to assume the intimate labour needed to continue her business. Brokers speak of their clients or patients in terms of friendship. Petra claims,

Sometimes I try not to think of it as a business because, yes, for business you want more business, you want profit, you want to grow. But in this aspect, I just wish it was the other way around. I think I would be happier if people told me I don’t need this treatment anymore, because our bodies are healthier and better and we’re getting pregnant on our own.

It is clear in talking to Petra that she feels emotional strain through her work. While she would prefer women not to suffer, she acknowledges that she has a business that relies on growth and profit. The uncomfortable global linkage between “disease” and profit is glaringly apparent within a medical tourism infrastructure.

Both IVF brokers employ their family members who are still in the Czech Republic to act as coordinators in the Czech Republic. Hana's father is the driver for clients to and from the airport, while Petra's mother runs a Brno apartment that serves as accommodations for most IVF Choices clients. Their transnational kinship ties form the foundation for this global care chain of North American reproductive travel to the Czech Republic. Allan and Alida, a couple from Austin, repeatedly spoke about Tom and Hana's excellent care. Tom had been their main contact. Allan kept saying, "I would recommend Tom the broker, because he's got his family members over there. They pick you up, but more importantly ... just being able to pick up the phone any time of day and being able to call," while they were in the Czech Republic, was the most valued service. Tom and Hana told clients to call them—on the mobile they provided—anytime they needed translation assistance or had a question. This meant that Tom and Hana's phone rang off the hook, at all hours of the night.

Calling someone in the middle of the night evokes phoning parents during an emergency. The labour of IVF brokers is intimate, demanding and time-consuming. Since their labour reaches far into the evening, brokers must always be accessible to their clients who have trusted them and travelled halfway across the world under their guidance and protection. But that is what you do for "family." Hana said to me, "It's so great how you get attached to people and when you talk to them ... you just become more like a friend than a formal client, you know, business relationship." Even in their thinking, IVF brokers feel satisfaction in their intimate labour, often deemphasizing the profit they are earning. IVF brokers are continually speaking of how they "care" about their clients, in effect diminishing the attention placed on the market transaction that is occurring. Again, IVF brokers embody the intersection of intimate labour and a heightened commodification of intimacy.

In my interviews with the owners of both IVF brokers, they "emphasized the affective labour involved in their work" (Whittaker and Speier 2010:364). IVF brokers' websites are adorned with patient testimonials which reiterate this affective discourse, romanticizing the relationship they have with brokers. Testimonials of past clients repeatedly thank the owners for treating them like family and for the "care" they provide. One IVF Choices testimonial reads, "We were treated by [Petra] as if we were family." Another claims,

By the time we left, we felt like family. We were continually pampered with personalized service and special touches, like the 'his and hers' full-body mas-

sages, were a treat. We were always kept informed of our progress, and we felt genuinely cared for ... Our heartfelt thanks to our new "Czech family."

The usage of "Czech family" iterates an affective bond felt by North Americans for IVF brokers, and this bond eases their experiences and stress of travel abroad for treatment. Another woman writes, "Thank you for opening your life and family to us, I feel very blessed to have 'discovered' and worked with [IVF Choices]." Reproductive travellers begin to conceptualize the networks of coordinators in familial yet transnational terms. In fact, since there are two main IVF brokers for the Czech Republic, patients hinged their decision-making regarding which company to work with on a sense of "connection" they may have felt with one of the two owners; this connection alone may have been the impetus for hiring one broker over another. "Connections" are an important trope for understanding the affective bonds of relatedness created between people. These bonds reflect a larger trend in the global tourism industry of an increasing emphasis on the importance of emotional work in cultivating future clients (Cabezas 2011).

Intimate Labour within the Family

Charis Thompson has written about the fertility "clinic as a site where certain bases of kin differentiation are foregrounded and re-crafted while others are minimized to make the couples who seek and pay for infertility treatment—the intended parents—come out through legitimate and intact chains of descent as real parents" (2005:145). In the North American context, Thompson argues, money plays a significant role for infertile couples to establish procreation intent (2005:145), which makes sense given the nature of the "baby business" (Spar 2006) in which ARTs are embedded. Although the trip to the Czech Republic is more affordable than IVF in the United States, couples still spend roughly CAN\$10,290 for the entire trip to the Czech Republic, including medical expenses. Many rely on the financial assistance of family to go to the Czech Republic. Such loans can be considered as "doing kinship" work, as Maureen used inherited money from her grandmother, money she wanted to "stretch" to make the trip (Thompson 2005:146).

Jessica, in weighing the options for future visits to Zlín, acknowledged that they could not save as they had before, now that they have twins from their first trip. She was thankful that Doug's "parents did say that if we wanted to go back that they'd be willing to help us out financially." In addition to financial support, extended relatives provide other kinds of intimate labour, from home via Skype or by coming along on the trip.

One must remember, “technology does not necessarily diminish intimacy but only changes its dynamics” (Boris and Parreñas 2010:13). In this case, patients Skyping with family in North America while they are in the Czech Republic are relying on family support and, through these technologically assisted familial conversations and transfers of money, are producing kin and family.

Not only echoing the affective language used by brokers, couples also utilize the term *vacation* to describe their experiences in the Czech Republic. IVF brokers try to sell a “vacation” so that couples do not feel as though their money is wasted if their cycle does not work. Thus, in addition to the freedom from the daily stresses of life in North America, couples enjoyed the quality time they had together, since it is a rarity for Americans to have three weeks off. One woman said, “I love being away and not having to work, it is really nice not having to deal with daily pressures.” John, a husband from Dallas, also said, “The whole cycle thing is going to be tough, so why not go somewhere where one doesn’t have all the everyday stress?” Couples often juxtaposed their “normal busy” lives with the quiet, relaxing town of Zlín.

I always ask patients about the most positive aspects of their trip. Faith, a woman from Georgia, said, “Definitely family time—one-on-one time with my husband. We both work so much it was a treasure.” Jessica also said, “Being away from work and home and all the stress of that with my husband has been great.” Couples enjoyed leisurely meals at local restaurants. There were known favourites, like the Sunflower. Jenny fondly remembered one restaurant as like eating in someone’s home, again instilling comfort for the North American reproductive travellers. Maria and Ryan, a couple from Oklahoma who had been to Zlín a total of three times, took full advantage of their time in the Czech Republic and considered it a family vacation. Maria says, “I can bring my whole family over and be relaxed and not stressed and actually have a good time, enjoy ourselves, travel. I know I’m coming to a place where they actually care, they want to see you get pregnant.” These statements reiterate the claims made by IVF brokers, imagining them as friends or family who care. The Czech Republic is a safe haven for couples on a quest for parenthood, as they strengthen their familial bonds while abroad.

It was rare to see a woman alone in the Czech Republic. The majority of patients I met were heterosexual couples. However, if a woman subsequently visits for a cycle using her frozen embryos or sperm, she may travel

with a woman she met on a previous trip. Claudia, a woman from Seattle, told me about her second trip with a woman she had met while on her first trip:

We talked when we got back home, and we went through the ‘Are you pregnant, are you not?’ Then I was and she wasn’t; it was very devastating for her. I ended up having a miscarriage and we would talk and a few months went by and then we kind of talked about [how] she was going to go again, and I thought, ‘Don’t we want to try again one more time?’ I think sometimes, especially for me, I don’t have too many friends who have fertility issues and so when you meet somebody who does, who understands what you’re talking about, it’s a whole different [story].

Here, the affinity women feel for those they met during their trip is a central link between new forms of social kinship built among infertile couples. Catherine Nash (2003) writes about Irish Americans who conduct genealogical research, often travelling over to Ireland to meet long-lost relatives. Along the way, they meet others on similar journeys, and they feel a sense of commonality and affinity with one another. These bonds are similar to the relationships formed between North Americans using reproductive technologies in the Czech Republic. They meet one another on these global journeys, creating and sustaining geographies of relatedness. Maureen chose Zlín because she sought the company of other Americans: “The comfort of having more people who come here and knowing that there will probably be other Americans here that I can talk to when we were here was a very big part of us choosing to come here.”

In addition to husbands or other women undergoing treatment, parents or siblings would also visit or come along on the trip to the Czech Republic. In addition, couples might have extended family in the region or close friends whom they visited. Jenny and her husband Elliot visited family in Germany while in Central Europe. Claudia and Ben went to see old family friends in the Czech Republic who had known Claudia’s father. She nostalgically claimed that she felt as though she was walking in her recently deceased father’s footsteps, visiting his long-term Czech friends. Couples on a “quest for conception” (Inhorn 1994) are sustaining geographies of relatedness in Central Europe within a context of heteronormativity.

Moravian Clinical Intimate Labour

Marcia Inhorn claims, “IVF providers have built successful practices based on their technical competence” where doctors provide “patient-centered care” (2003:136). Czech

doctors give patient travellers attentive care. Kay was one of the first reproductive travellers I met electronically in 2009. She lived overseas because her husband was in the military. Kay said, about her care in the United States: "I never felt like a patient, just a cheque book. The treatment was never discussed with me, I was just told what to do and when that didn't work, there was no discussion of why, [I was] just told to write another cheque and come back for cycle day 2 monitoring." She said that her Czech doctor was "warm, friendly and truly interested in getting his patients pregnant." The more affordable and individualized care that patient travellers receive directly from Czech health care providers is interpreted as compassion.

When I asked Maria to tell me the main reason she travelled to Czech Republic, she could not limit it to just one reason:

I know I'm coming to a place where they actually care. They want to see you get pregnant, because their main staple is not from people coming over for IVF. Their main staple is everyone in the Czech Republic who needs IVF gets three IVF treatments on the state. That's their main staple, so they're taken care of. And we come here and we know that they are going to do what's best for us and advise as to what's best for us, not what's best for them or what fits their schedule. If you need a transfer on a Saturday, they're here. If you call that clinic 24 hours a day, 7 days a week, somebody's answering the phone. It's just the whole experience for the price is ... Honestly, if I had the money, I would have paid twice the amount that we would have paid in the States to have the better experience.

Maria denies any profit motive on the part of Czech doctors and hyperbolically claims that they truly care, since the national government gives most Czech women access to three cycles of IVF.

The clinic in Zlín, which opened in 2001, is where Tom and Hana conceived their twins through IVF. Patients there imagine the doctors gifting them with a family. Just as the "donated" egg is considered a gift and cannot be given a market value, I witnessed the use of gift-giving language by Hana, who claimed that Dr C of the clinic "gave" her children. The language of gift-giving concretizes the intimate labour performed by doctors and embryologists and is an externalization of the affective discourse around these commoditized transactions. A final way the clinic creates kinship for reproductive travellers is that, after the embryo transfer is complete, the embryologist or nurse tells a patient that the embryos are now "home," which further naturalizes

the connection between the embryo and the woman, even if the embryo is made from gamete donation.

In gift-giving discourse and the use of familial terms, we witness the importance of intimate labour performed by doctors and nurses. In a similar vein, Linda had needed a registered nurse to help administer a shot at home in Seattle before she departed for the Czech Republic. She now refers to the nurse who helped her as "aunt." She retells the story:

I went in there, [and] she gave me the shot. But the shot—here you shake it up, there you don't. So when she shook it up it bubbled. So she actually had to give me two shots and we were worried that I didn't get enough of the stuff out of the syringe. She was freaking out, I'm freaking out. As it turned out, it was fine [motioning to her twins]. But yeah, she calls herself Auntie Laurie, because the kids go in for all their well appointments.

Health care providers are imagined as truly caring in their mutual "freaking out," and thus intimate bonds are forged between health care providers and, in Linda's case, the children born of ARTs.

To be one of the 41 Czech clinics that serve North Americans, they must have successfully treated the owners of the IVF brokers. During her pregnancy—the "gift" of Dr C—Hana approached Dr R, the clinic's owner, about setting up a contractual relationship. Again, these broker companies reveal new forms of global commoditized care, linking ARTs, bodies and transnational families. Dr R remembered:

She has twins from our clinic, daughters, and she told me, I want to co-operate. I think it's a fairytale, a lot of people would like to co-operate, from U.S., from Great Britain, from Ireland and, nothing. I think it was nothing too, but Hana is very clever and start(s) this website and after three months, every month, approximately five to ten clients from United States. And after a few first deliveries in the United States, we started [to] be very popular and now we have approximately 40–50 clients every month not only from American, from all over the world.

What is particularly fascinating is that the Zlín clinic is off the beaten path, located in a hard-to-reach small town, rather than in Prague, the usual hub for tourists visiting the Czech Republic. Patients often claim they chose to travel to Zlín rather than Prague or Brno because, as Leah said, it is "smaller, friendlier." The small, family-owned clinic gives patients the sense that they will experience more attentive doctors and nurses. Petra, a coordinator, says her patients like "the clinic

that is more personal, it is smaller, family-oriented, the owners are the treating doctors." The migratory pathway that was first carved by Hana and Tom to Zlín is now well beaten by hundreds of North Americans, who are seeking the promised emotional labour of Czech doctors and nurses.

The Penzion: A Czech Home

When I first travelled to Zlín in the summer of 2010, I followed Hana's advice to stay at the penzion in Zlín where the majority of North Americans stay. Testimonials heap endless praise on the penzion:

If you are traveling to Zlín for leisure, business or medical purposes, this is the *only* place to stay. The price is very reasonable, especially with all the things that they do for you and help you with. They are truly amazing and we now consider them part of our own family. We love the *Penzion*!

Again, the discourse is that these Czech hosts are "family" rather than "innkeepers." The penzion is a small bed and breakfast that is family-owned. Sitting atop a field overlooking rolling green hills, the family who owns it provided quality service with a huge touch of generosity. It is a key link in this global care chain of reproductive travel.

The penzion owners encourage North Americans to consider it "home" while they are staying in the small Moravian town. Since North Americans stay for up to three weeks, they do treat it like home. Maria and Ryan considered the penzion their home, and various couples claimed that, aside from the clinic, the penzion was the best part of their entire trip. Couples who stay there can opt to stay in one of the "apartments" that offer them all the comforts of home—Internet, television, a kitchenette, sofas. Maria gushed,

Oh, we love the penzion, absolutely love it. It's exactly what you need. It's not extravagant. It's not a bunch of frills and whistles. We rented the apartment upstairs and you have everything you need ... I love the way that it's all very compact and organized ... and it's not the consumer frame of mind over there.

Again, the economic framework of the travel industry is denied, and the "simple" homelike quality of the apartment makes couples feel cared for. Faith said that when she and her husband returned for the second trip—aligning their trip with a couple they met the first time—they "felt like we were coming back home." North Americans are travelling where others have been successful in getting pregnant. Thus, their personal bio-

ographies become entangled with one another (Rose and Novas 2005:452).

As scholars of international adoption have noted, "others who traveled and lived together when they collected their children often create a common history" (Howell 2006:77). Similarly, the strange town or hotel becomes a shared place of origin for North American reproductive travellers. The penzion is advertised within the blogs of previous patient travellers and on the website of IVF Holiday, and it is also part of the clinics' recommended accommodations. Patients actively involved on the blogs during their Czech stays would keep track of those who were expected to arrive, and relationships begun online were concretized in person. I was often notified by other patients when a new couple was expected to arrive, and I would see them as they met for the first time, yet appeared to be old friends.

As she had with the clinic, Hana approached penzion owner Mareka, who remembered: "It was a pregnant [Hana] that started the whole thing. It was her idea, because she came with her husband to Czech Republic to get pregnant and because with assisted reproduction it is much cheaper here than in the U.S., she [wanted] to build a business here. It was her idea (*Byla to její myšlenka*)." To date, the penzion is still the favourite of most North American reproductive travellers to Zlín. Mareka remembered when Hana's twins were born, and after a couple who had been staying in a downtown hotel were not happy, they transferred to the penzion and its business took off immediately. We can see similar trends in the businesses of the clinic and penzion, as the first patients hesitantly made the venture, enabling a future constant supply of more North Americans. In 2012, about 35 per cent of all guests at the penzion are coming to visit the clinic, and of those going to the clinic, 95 per cent are from the United States.

Mareka is an anomaly in the Czech Republic: she hugs people, and she prepares breakfast with a huge smile on her face (see DeVault 2008). She typifies a service orientation that can also be considered intimate labour. She has been known to wait up to greet new arrivals or to pick them up at the train station at any time. Maria remembers her first arrival: "We got here late at night, [Mareka] was very welcoming even though we got in at 2 o'clock in the morning." This custom of waiting up to greet one another continued for those first-timers who had never been to Zlín before. It created and evoked a sense of homecoming. When Maria's husband had not arrived yet, Mareka took her family touring: "[She] even took us to the zoo the day we were waiting for [Ryan] to come in, because I was so anxious

for him to be here ... She knew we were anxious and took us to the zoo." This intimate labour extends far beyond the typical contractual relationship between penzion owners and guests. Mareka's warm personality encouraged North Americans to feel at home—this is her intimate labour. Mareka's warm spirit and energy were something that North Americans valued. The irony, however, is that Mareka was so busy running her business that she did not have time to visit her own family. This fact may be linked to other forms of female labour such as domestic labour (see Constable 1997).

Like Maria, Linda said, "Oh it was great, it was just real, you felt like a part of either a family or an old friend coming to visit that you haven't seen for many, many years and you come back. It was warm." Although it was their first trip to Zlín, the fact that she evokes the feeling of returning to family or really good friends reveals the extent to which the penzion is a haven for reproductive travellers. Her husband continued, "They cared, they cared how we were doing and always would be inquisitive about us and what was going on and if everything was good. They went out of their way to be really kind." The effusiveness of affection for Mareka and her family reveals the way that "patients tend to romanticize the level of care and the relationships with their practitioners despite the language and cultural divides" (Whittaker and Speier 2010:373). Alida and Allen, in recalling their stay at the penzion, remembered fondly the way that Mareka and her family "made everything wonderful, absolutely wonderful. They felt like family."

Maria, who had visited Zlín three times for treatment, spoke of Mareka and the penzion as open-armed, caring people:

It's just so highly recommended; honestly, they take *care* of everybody. There was even one woman over here who got sick and her husband had already gone home and [Mareka] waited on her hand and foot. I mean brought her soup and made her take her meds and made sure she was okay and it's just a very ... it's not a hotel. It's very family oriented. They have celebrated three birthdays with us and she helped me order a cake—she knew where they made cake—and they brought out fireworks, they had fireworks for him and they're just very open arms kind of people you know, very sweet, very caring.

We see, as with the IVF coordinators, travellers referring to Czech hosts in affective, familial terms of care. The intimate labour of Mareka and her family promotes the continuation of North American CBRC in the sleepy town of Zlín.

Meals as Sustenance of Social Kinship

One morning I ran into Valerie and Dan sharing breakfast with Lauren and John, newcomers from Dallas. After their first appointment at the clinic that afternoon, Lauren knocked on my door and invited me into their air-conditioned room for an interview. Lauren works with deaf children, and John is employed in real estate. A relatively young couple, they turned to church support groups and found solace in seeking answers to why they were having trouble conceiving. John's dry, quick wit balanced Lauren's soft-spoken southern accent as they recounted entering the world of reproductive travel through a friend of a friend on Facebook.

Mareka told us that a third couple would be arriving that afternoon. Janice and Craig, both registered nurses from Florida, instantly bonded with Lauren and John as they sat outside the penzion enjoying the cool summer night of their arrival. Both couples were going through IVF using their own eggs, so their stay in the Czech Republic would be a much lengthier three weeks, as opposed to the ten-day donor egg option. Janice and Craig were carefully watching their budget, striving to have enough to build a house back in Florida. Thus, they did not venture to Austria or Poland, as Lauren and John often did on the weekends. Though they differed in the extent of their European travel, the men did enjoy tasting different Czech beers and Moravian wines they purchased at the grocery store situated at the bottom of the hill. I was struck by the ease with which the couples moved freely about one another's temporary living spaces by the second week of their stays.

The town of Zlín is sleepy, with not much to do. Breakfast is provided by Mareka, who serves a new dish every day to each guest individually. Tables are pushed together, guests seated together by nationality and language. Mareka also lets people know when other U.S. travellers were arriving at the penzion, thus sustaining and creating bonds for her guests over yogurt, granola, eggs, fresh bread and cappuccinos. Breakfast is the social hour of the day. Plans are made to go to local attractions, and conversation flits between medications, transfers, egg quality, local sights and Czech food. Breakfast is a guaranteed time to socialize with others staying there. Zoe remembers:

While we were at the penzion, there was a couple that we basically had breakfast with every morning, a military couple, the husband was stationed in Germany, so they had driven down from Germany. And, due to the fact that my husband is sort of like the equivalent to national guard and he had actually been to a couple of the bases that the husband had been stationed to in the UK, they sort of got along.

It is the affective bonds created over meals that most find comforting while abroad. Daniel said he felt as though he was part of a community:

And then to have all these other people here that are ... like, 'We had twins on the first try, now we're here again.' And then everyone else, you know, 'We're going [to the clinic] on Monday,' 'We're going on Tuesday.' We went out with a couple who just had their transfer and they were heading back home in a couple days and it just makes you feel like you're a community, part of a system that works.

Mareka claims to be truly happy when she witnesses such community, and we can consider these friendships a form of social kinship. Janice and Craig, new to ARTs, relished the advice they received from other couples in Zlín. Janice said, "I think, out of the whole trip, that [advice] was the great positive part, because they're all doing this." Her husband concurred: "The camaraderie, other infertile folk." Doug even began coming down to breakfast in his bare feet, a sign of truly feeling at home.

Creating families is considered to be a private endeavour, yet ARTs tend to publicize this endeavour, removing procreation from sex and placing it into the hands of a doctor and embryologist. The fact that couples are abroad grants them a level of anonymity and protection from this public nature of ARTs. Also, the presence of other North Americans at the penzion who are considered close friends extends the public nature of ARTs. However, since they are isolated in a small, homelike penzion, they feel a sense of privacy that has been created in the home, and they are protected by their Czech hosts.

The "home" created in Zlín "is a place where people can talk of their issues seldom discussed otherwise" (Becker 2000:108). It is while they are in the Czech Republic, surrounded by other infertile couples, that they feel the comfort provided by this social kinship network. In fact, "families often go on meeting long after their children have arrived," attesting to the strength of the kinship bonds formed in Zlín (Howell 2006:78). While Julie was in Zlín in May 2008, there were 10 or 12 other couples there, "all coming or going," not necessarily at the same time. She continued, "We became very good friends with two of the couples we met over there, one from Georgia and one from Kentucky. We still get together with them a couple times a year." The same was true for Maria and Ryan; as Maria remembered, "One of the couples actually drove up and spent the following Christmas with us and we talk to them all the time." Spending annual holidays traditionally spent with

extended kin is now extended to those social kin with whom bonds were created in the Czech Republic.

Similarly, Claudia and Ben had met a couple who were also from the north-western part of the United States. Claudia recalled, "I think sometimes, especially for me, I don't have too many friends that have fertility issues. So when you meet somebody who does, who understands what you're talking about, it's a whole different ... and for Ben too." At this point, Ben chimed in, concurring with Claudia, "There was that connection, that's kind of why I think we became friends with them." The usage of connection, which is likened to the feeling Claudia and Ben felt when they first met one another, appears once again. "Connection" is important in forming bonds of relatedness. In talking about the other couple, Claudia continued, "We're close in ages, we kind of clicked with them right away too and he [Ben] really clicked with her husband."

The importance of a "home away from home" must not be underestimated for North American couples who are living away from home while creating a family. "Companies such as these reinsert the discourse of affective labour, care and nurturing within a reproductive experience that is otherwise devoid of all familiar relationships" (Whittaker and Speier 2010:364). Essentially, in trying to create a family, North Americans surround themselves within a network of social kinship based on infertility.

Threads, Connections and Social Kinship

The bonds of social kinship created between North American reproductive travellers, and then sustained online, are similar to those of Nash's (2003) Irish Americans, mentioned above. Just as Nash's Irish Americans exchange gifts and new forms of relatedness, so do reproductive travellers. There is a sense of commonality and affinity in their shared experience of infertility and going through a cycle of IVF in the Czech Republic (Nash 2003). It is a source of comfort for couples to meet other North American couples with whom they can relate on so many levels. Virtual communities, which first informed North Americans about CBRC, are also maintained after couples have returned home.

The length of time spent in the Czech Republic often serves to strengthen bonds between couples going through IVF. They experience adventures together, see new places and support one another emotionally. Jessica thinks back fondly on her trip, saying,

We enjoyed our hotel and the other people that we met there: you, April, Larry and everybody. I really liked that we had other couples there that we could

identify with. We liked Zlín, it was fun just to walk down into town each day and have dinner, go shopping or whatever and then have our hotel up in the hills. It's quiet and pretty.

She also enjoyed having time off from medical appointments to go to Poland with April and Larry for one weekend.

As couples and women prepare to return home, after staying for one, two or even three weeks, tears are shed, and they are sad to leave. Mareka gives every couple two bibs, one for a girl and one for a boy, saying "Made in Zlín," another indication of the heteronormativity that undergirds these family formations. When they leave the penzion, they sign a guestbook. Messages adorning the pages promise future visits, as if they are family members. People thank Mareka for the "personal touches" she adds, and couples promise to keep in touch. Maria even brought Mareka a Betty Crocker cookbook² on her last visit. Such gift-giving signifies extended relations of obligation, long-term networks of reciprocity (Mauss 1922).

Since "families often go on meeting long after their children have arrived" attests to the strength of the kinship bonds formed in Zlín (Howell 2006:78). While Julie was in Zlín in May 2008, there were 10 or 12 other couples there, "all coming or going," not necessarily at the same time. She continued, "We became very good friends with two of the couples we met over there, one from Georgia and one from Kentucky. We still get together with them a couple times a year." Her husband, Ryan, continued: "We actually spent Christmas with them at our house." The fact that these new families stay connected and spend important holidays like Christmas with one another indicates the strong element of kinship they feel for one another.

The bonds of social kinship between North American reproductive travellers are created and sustained online once they return home. This is similar to the situation of Irish Americans who have travelled to Ireland tracing their ancestry. They meet one another during their travels and research, and they exchange gifts, signifying new forms of relatedness (Nash 2003). There is a sense of commonality and affinity in the reproductive travellers' shared experience of infertility and going through a cycle of IVF in the Czech Republic (Nash 2003). Virtual biosocial communities, the very ones where North Americans first heard about the possibility of fertility travel, are still maintained after couples have returned home.

One reproductive traveller's blog claimed that all offspring born from IVF in the Czech Republic must be related:

The last time we had to think about *anything* having to do with the procedure was the moment we stepped on the plane to Prague. It was as if we were on a private tour ... but better, because we had three other couples undergoing IVF and sharing the same experiences and nervousness. In a matter of a very few days we became friends and, probably, friends for life ... It's as if any of the offspring born of the Czech experience shall be cousins!

Relationships established in the Czech clinic's waiting room, the penzion or online continue as patients disperse to their homes throughout North America. Claudia and Ben kept in close contact with the couple they had first met, since they also lived outside of Seattle. Four years after Claudia and her friend made their second trip together, the families were planning a summer trip to the beach. I received a funny anecdote from Faith in an email she sent me after our interview:

We get together periodically with 2 other US couples we met over in Zlín. We all had our egg retrievals done the same day, so our babies are all the same age. It's fun to keep in touch and we have a lot in common because of infertility struggles and then having babies at the same time. (One of the husbands likes to joke about the fact that our babies were all conceived in the same room on the same day. It makes people's heads turn, that's for sure.) When we go out to eat together, we usually take up all the highchairs, and people ask us why the babies are all the same age, and which babies belong to what parents. There are 3 couples, but one set of twins, so 4 babies.

The families that are created through IVF in the Czech Republic have a shared origin; although it may not necessarily be the same room, it is the same clinic.

These social kinship networks are gendered, just as the virtual biosocial communities for infertility support groups are. Women are the ones who continue with the "work of kinship" by keeping in touch with Czech hosts, brokers and other reproductive travellers they met along their travels (di Leonardo 2009). Maria assumed the responsibility of maintaining these kinship bonds by sending Christmas cards, saying, "Yeah, we definitely [send] Christmas cards. You know, everybody's got to get updated pictures and all that good stuff." Maria recounts the people she keeps in touch with, primarily online:

We have people that we've met on our first trip that we talk to quite a bit. There was one lady—she was a single parent by choice—and her first attempt did not work. She's on my Facebook and she's always commenting, because she ended up having twin boys and so we have these boys ... She's always commenting on how big the boys are getting ... I usually talk on the phone with Janice because it just seems to be easier for them, because they're not big on the computer. With Linda and Michael, it's usually email, because you know they are busy, they were busy before they had twins.

Of course, a woman's participation within these virtual worlds continues to ebb and flow as she grieves a failed cycle, miscarries or feels overwhelmed parenting twins.

Linda, who met Maria while she was in Zlín, also remembers those she met while in the Czech Republic. "I met four groups of people, four couples. Of the four, three of them we kept in close contact until the babies were born. Once the babies were born, the contact kind of dwindled. But with Maria, every five or six months we send an email, I'll get one out of the blue from her and vice versa." Linda also keeps an online relationship with a woman with whom she shared only one breakfast at the penzion.

I only met her briefly. I talked to her at breakfast the last day that she was coming and I was leaving. I sat next to her husband at breakfast and across from her, so I chatted a little bit and I told her about the Resolve website. She didn't know about it. Afterward, she got on the website—I see her pop up, so I communicate with her off and on ... So it's like when you know she's going or she's preparing to go, I would send her messages.

It is not only reproductive travellers who keep in touch with one another. North Americans also send updates to their various Czech hosts at the penzion, the brokers or the clinic coordinators. Maria said, "Mareka gets pictures at Christmas time, cards. The last time we were there, she gave us bibs that say 'Made in Zlín' and they were so cute. When you're there, it's just like you're family and it makes all the difference in the world ... We're talking about going back, not for a kid, but for a visit. We want to see Mareka."

Other couples became close to their Czech brokers, the ones who took them to the clinic and around the town. Gifts might be sent to the coordinators, or they might become Facebook friends. Petra had a bubbly coordinator, Jana, who had worked with her from the beginning. She told me how she joined Facebook so she could keep in touch with two couples. She was stunned

when she received a huge box in the mail that one of the couples had sent her one Christmas after the birth of her baby. These gifts sustain social kinship ties. Dr M said that about 70 per cent of their North American patients send pictures of their babies to the clinic, pictures that can be added to the universal decorative baby wall.

Conclusion

The global route of CBRC between North America and the Czech Republic rests heavily on the importance of care as a commodity in medical service. IVF brokers are central in laying the foundation of this global care chain, and their transnational kinship ties form the basis for this particular route to parenthood. IVF brokers recognize the dissatisfaction lower-middle-class North Americans feel toward the U.S. "baby business" (Spar 2006), and they market a fertility holiday that assures patients that they care. IVF brokers present themselves as family members to their clients, and the intimate labour they provide patients is heavily emotional and empathetic.

Intimate labour is a useful lens through which to understand the ways in which Czechs are able to create "homes" for North Americans while they are undergoing fertility treatment abroad. It is apparent that the market of CBRC from North America to the Czech Republic successfully builds on affective ties created between IVF coordinators, North American patients and the Czech hosts in clinics and accommodations. What becomes highlighted is the care provided by hosts, and what is de-emphasized is the privatized market incentives implicated in such a global trade. The market transactions that occur between patients and brokers and clinics is minimized, and patients emphasize the social kinship formed in the private "home" of the Czech penzion. We must consider IVF brokers and Czech hosts as offering intimate labour, as they help globalize new forms of kinship tourism for North American couples journeying abroad hoping to create families.

This community of reproductive travellers reveals the importance of intimate labour in sustaining families created using reproductive technologies abroad. Return reproductive tourism to the Czech Republic reveals the important dimension of care, with its expanded meanings for lower-class North Americans trying to create a family using this route. Despite the different paths of each couple's journey, the social kinship bonds hold them together. We must consider these social kinship networks to be new communities, which are both virtual and experiential in nature. These communities should be

traced in the future, to see how shared experiences of this particular route to kinship will be sustained.

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Notes

- 1 I obtained Institutional Review Board (IRB) approval for conducting this research through Eckerd College.
- 2 The *Betty Crocker Cookbook* is in its tenth edition and was first published by General Mills in 1950. It is an iconic, traditionally "American," cookbook that many North Americans remember having in their homes growing up or, still do have.

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Tracing the Red Thread: Chinese–U.S. Transnational Adoption and the Legacies of “Home”

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Abstract: Contemporary forms of globalization have expanded conceptions of “family.” A particular instance of this involves U.S. parents travelling to adopt children from China. These families utilize transnational networks in ways that encourage multiple trips “home” to China and may involve heritage tours, humanitarian projects or nascent birth-parent searches. Consequently, adoption tourism, marketed as an “adventurous family journey” to a “far away world” where your “cherished gift” awaits, illustrates the ways in which contemporary notions of kinship are linked to complex forms of travel whereby boundaries between tourism, leisure and social projects are increasingly blurred.

Keywords: China, kinship, tourism, adoption, transnational

Résumé : Les formes contemporaines de la mondialisation ont élargi les concepts de « famille ». On en trouve un exemple particulier chez les parents États-Uniens qui voyagent en Chine pour y adopter des enfants. Ces familles utilisent des réseaux transnationaux dans des manières qui favorisent de multiples voyages « de retour à la maison » en Chine, et qui peuvent comprendre du tourisme patrimonial, des projets humanitaires ou la recherche de parents biologiques, aujourd’hui en émergence. En conséquence, le tourisme d’adoption, mis en marché comme « un voyage familial d’aventure » vers « un monde éloigné » ou vos « cadeaux chéris » vous attendent, illustre les manières dont les notions modernes de parenté sont liées à des formes complexes de voyage dans lesquelles les frontières entre tourisme, loisirs, et projets sociaux sont de plus en plus brouillées.

Mots-clés : Chine, parenté, tourisme, adoption, transnational

Background

A buoyant expectant mother turns to her husband and happily tells him, “It’s time.” Quickly, the parents bustle around the house hurriedly grabbing jackets, keys and bags and leave their home. They get into their car and arrive at their destination in anticipation of the arrival of their first child. For these parents, featured in a U.S. nationwide advertising campaign by the American retailer J.C. Penney, the delivery of their new child will be at the airport, not the local hospital. The commercial, shown during the 2000 coverage of the Sydney Olympics, ends with the white parents returning home from the airport with their newly adopted Asian daughter. This advertisement is one of an early set of images promoted by IKEA, John Hancock, Target and other retail stores that is indicative of the rising awareness of transnational adoptions. In important ways, this commercial is now dated and inaccurate; Korean–U.S. transnational adoptees no longer travel to the United States to meet their parents, and most other Asian adoptees were adopted by their parents in the country of their birth. Consequently, parents are the ones traveling to far away worlds to meet their children and have become the predominant symbols of transnational adoptive kinship, parental love and commitment.

Cultural anthropologists have long argued that kinship is not a fixed or “natural” category that is solely the product of biology. Adoption, as well as assisted reproductive technology (ART), are key examples of the ways in which families can be viewed as made rather than born (Modell 1994; Weismantel 1995; Yanagisako and Collier 1987). Contemporary U.S. adoption practices were transformed following the end of World War II when parents in the United States began adopting foreign children orphaned by war. Although the bulk of these children were from war-ravaged countries in western Europe, from 1948 to 1953, 2,418 children were adopted from Asian countries, and roughly two-thirds of those children were Japanese (Pertman 2000:54). Con-

sequently, this period marks a turning point in U.S. adoption trends, with adoptive parents beginning to reach across perceived racial and cultural boundaries, a phenomenon that has become even more commonplace since the 1960s.¹

Like medically assisted reproduction, contemporary forms of adoption now extensively utilize transnational networks and travel; thus, travel and adoption have become deeply interconnected. For example, in addition to preparing to become parents, most adopters must also prepare to travel to an unfamiliar country, often with a significant language barrier. Families may also plan return trips to provide services to Social Welfare Institutes (SWI) or to explore the culture into which their child was born.

Anthropologists and others working on adoption are now exploring the relationship between this form of family-building and travel (e.g., Cohen 2007; Dorow 2006; Kim 2005; Louie 2004; Ponte et al. 2010; Volkman 2005b). In addition, scholars researching Chinese–U.S. transnational adoptions have begun looking at ways in which relationships to a Chinese homeland may be understood as client, ambassador or gift (Dorow 2006), through heritage tours (Kim 2005; Louie 2004; Ponte et al. 2010) and by participating in language classes and activities sponsored by local U.S. organizations such as Families with Children from China, and other forms of “culture keeping” (Dorow 2006; Jacobsen 2008; Volkman 2005a). This article contributes to this recent line of inquiry by focusing particularly on Chinese–U.S. transnational adoptions as well as the interplay between tourism and travel (between the United States and an adoptee’s Chinese “home”) and kinship, in what I term “kinship tourism.”

In the case of Chinese–U.S. transnational adoption, the adoptee is at once a local at “home” in China and also a tourist travelling domestically in China for two weeks and then returning to the United States with a privileged immigration status. This status and newfound prosperity highlight her position at the nexus of disparate interests and experiences of both tourism and kinship. In this way, she literally embodies the ways in which these interests may be bridged.

U.S.–Chinese transnational families are a compelling example of kinship tourism because the number of adoptions increased from a mere dozen in 1988 to over 3,300 in 1996, peaking at 7,044 in 2004. In fact, in the United States, foreign-born children are adopted from China more than any other country.² The growth of adoption agencies has kept pace with the demands of prospective adoptive parents, and travel has become both a very important component of the initial adoption

process and, for many, an ongoing aspect of family life and identity formation.

In particular, many adoption agencies, counsellors and the Chinese government, through their Ministry of Civil Affairs (responsible for overseeing adoptions), argue for an enduring relationship between China and adoptees. Consequently, travel has become important to families, as they are brought together and work to return “home” to China. In this way, kinship travel is constructed to weave traces and legacies of “home.” This research looks at the ways in which Chinese–U.S. adoptees’ experiences differ from those of other waves of adoptees because the notion of China as homeland is brought into the adoption process by adoption agencies and counsellors. Moreover, families are encouraged to incorporate this into their family life, a process that begins as parents collect souvenirs on their adoption trip. As their children grow, many families move beyond simply discussing China and instead work to “return home” and “give back.”

U.S. parents who seek to establish kinship ties with Chinese children use travel to establish and grow those ties. However, simply describing the nature of this travel is insufficient because it lacks a full exploration of the context and power relations within which travel occurs. In this way, a study of tourism is much more effective because, unlike travel, tourism invokes an understanding of the context in which travel happens, the formation of cultural identity, the interplay between guest and host, the power structures and social relations within which travel is embedded, and the collection of industries that make travel possible.

Tourism and temporary travel have been part of human cultures for a very long time and have roots in pilgrimage, exploration and health. Tourism, as a focus for anthropology, began in the 1970s following the mass tourism made possible in the United States by improved resources and increased leisure time following World War II. Early approaches to tourism treated it as a “manifestation of leisure [which] presupposes a socio-economic milieu in which money and time-away-from-work can be accumulated to be spent at will” (Smith 1989:18). A tourist was merely “a temporarily leisured person who voluntarily visits a place away from home for the purpose of experiencing a change” (Smith 1989:1).

Since the early 1980s, anthropologists have examined more complicated connections between tourists and locals and the way culture is represented and understood in the context of tourism (e.g., Turner and Turner 1978; Nash 1981; Urry 1990). In general, older studies either focused on tourists and their motivations or examined the impact of tourism on locals (Stronza 2001:262). Contemporary

studies employ a transnational analytical framework (e.g., Ebron 2000; Ness 2005) and have also complicated the study of tourism, particularly with regard to space. For example, Hui notes that “numerous studies of tourism remain limited by spacializations that work out acceptable spaces for tourism” (2008:292). Historically, “acceptable spaces” have typically included places associated with leisure (the beach, mountains, historical sites, etc.) at the expense of “dark” places (war memorials, prisons, and sites of infant abandonment) (e.g., Urry 2002) and everyday spaces, such as home (e.g., Hui 2008:304), subjects that are now popular lines of inquiry. Tourism studies have also been complicated by projects that consider a wide variety of experiences that blur the boundaries between host and guest, work and leisure, sex and romance (e.g., Brennan 2004; Frohlick 2010), and reproduction and fertility (e.g., Inhorn 2011; Whittaker and Speier 2010). Importantly, adoption travel transgresses these spacializations and , incorporates “acceptable” destinations such as the Great Wall, luxury hotels, shopping markets and panda reserves with an adoptee’s “everyday” spaces (both in the SWI and possibly foster homes) as well as, increasingly, “dark” destinations such as roads and bridges, which are identified as places of abandonment.

Using Chinese–U.S. transnational adoption as an example, I argue that kinship tourism offers anthropologists a way of thinking about new family forms and the complex interplay between guest and host, and local and tourist. It also offers anthropologists a way of thinking about new forms of kinship that are “made overseas” and embedded in larger transnational structures of power.

Methods

I first began this project in 1998 in Pittsburgh when I was frequently asked about my earlier experiences travelling and teaching English in China, by friends, colleagues and their acquaintances who were interested in adopting Chinese children, typically girls.³ People I spoke with wanted to know more about the situation facing adoptive parents travelling to China and the reasons why there were so many abandoned children, especially healthy baby girls.⁴

While I could help prospective parents with some basic travel information and had seen dozens of adopting parents while in Guangzhou in early 1997, I realized I knew very little about the social issues surrounding the legal status of abandonment and the adoption of children in China. Following a highly inflammatory 1996 BBC television documentary entitled *The Dying Rooms*, foreign access to Chinese SWIs had been severely

curtailed, and I was worried that the Chinese adoption community would be reluctant to talk with me about such a sensitive topic.

Ultimately, these concerns were manageable, and I conducted extensive research beginning in 2001. This work is part of a six-year, multisite ethnographic research project conducted in three phases. During the first phase, I conducted fieldwork at various stages of the adoption process and used both formal and informal interviews with parents, staff and volunteers in U.S. adoption agencies and support groups. Research involved extensive participant observation in events such as educational and travel workshops, children’s playgroups and a variety of social events in Pittsburgh. I accompanied a group of adopting parents on their two-week trip to China to meet their children in Guangxi Province, and many of their thoughts and experiences are represented here. While all the U.S. parents and the Chinese SWI staff, volunteers and older children were fully informed of and approved of my research, to protect their privacy, I have used pseudonyms for them, as well as for the younger children in their care.⁵

The second phase of this project involved two years of working with NGOs. Funded in part by a Fulbright fellowship in the People’s Republic of China, while based in Beijing, I also regularly worked in SWIs in Tianjin and Jiaozuo (both within two hours’ travel of Beijing) and Henan Province. I volunteered as a secretary and coordinator for expatriate volunteer groups, local hospitals and international aid foundations that have established relationships with welfare institutes and provide supplemental funding and medical care to orphaned children. I interviewed 12 families who were returning to China to “give back” to children in China and were engaged in service projects organized by church groups and organizations, such as Half the Sky and Our Chinese Daughters Foundation.

The third phase of this project involved two summers (2007, 2009) of research in Beijing conducting additional interviews and returning to SWIs in which I had worked to gain a longitudinal perspective on outcomes for children and service projects.

U.S.–China Travel

Chinese folklore says, “When a child is born, invisible red threads reach out from a child’s spirit and connect it to all important people who will enter the child’s life. As the child grows, the threads shorten, bringing closer those people who are destined to be together.”

Story printed on the back side of “red thread girl”
note cards sold under adoption items at
<http://www.chinasprout.com/>

In China, red thread—in the form of bracelets, wall hangings and ornaments—has a distinctly auspicious meaning. It is quite literally woven throughout the fabric of Chinese daily life and rituals. In Mandarin, the red thread saying, *jian hong xian* (见红线), or “meeting by red thread,” is perhaps a timeless image in China. It is most often associated with a Tang Dynasty (618–907 C.E.) proverb known as *hong sheng ji zu* (红绳系足), or “feet linked by red cords.” This proverb tells the tale of the old man in the moon, who acts as matchmaker and unites destined couples by tying their feet together with a red thread. This union is often arranged over long distances and despite the objections of family. Given the history of pragmatic, arranged marriage in China, this image is not light-hearted or necessarily romantic but rather a reflection of destiny. And yet, over the past ten years, the red thread has become a powerful metaphor within the community of parents who have adopted from China. Red thread images are widely available through products sold by agencies, support groups, publishers and others serving the adoption community in the United States and China. Many of these items are designed with children in mind and are especially cute and appealing to families with children adopted from China. These communities are exemplified by organizations such as Families with Children from China that support Internet chat groups, local workshops, Chinese New Year celebrations and other events designed to foster a sense of community and participation around the experience of adoption from China. However, the complex and shifting meanings associated with the red thread imagery illustrate the ways in which travel is embedded in the formation of Chinese–U.S. adoptive families as well as the physical and emotional ties many families have to China. Shopping for red thread souvenirs while travelling, adding a small ornament to a backpack or wearing a bracelet may serve as a reminder of China and the ties that bind—a connection to Chinese culture and a form of “culture-keeping” (Jacobsen 2008) by (often white) adoptive parents for their Chinese daughters. For many, this is in anticipation of a more significant connection that often includes a return trip.

U.S.–Chinese adoptive families participate in tourism, and over the last decade, three types have become established: (1) adoption travel in which the family first comes together; (2) homeland or heritage tours organized by both adoption travel agencies and the Chinese government; and (3) “giving back” tours that are linked to development, Christian or charitable NGOs, such as those organized, until recently, by groups such as Half the Sky and Our Chinese Daughters Foundation. Although these forms of adoption tourism are often mar-

keted and discussed separately, what is most compelling is the ways in which the lines between these forms of travel and the ideals of kinship, leisure, travel and service are blurred.

Adoption Travel

When we get home at 4PM EST on Thursday we will have traveled half-way across the world to a whole new life.

—Email from adoptive parent, 1999

For transnational adoptive families, concerns about cultural integration are central to the adoption process. Following their selection of an agency and their completion of an initial application, parents begin to compile their dossier of required paperwork, which will include their birth, marriage and (if previously married) divorce certificates, references from friends, police background checks, a variety of government immigration-related forms and financial statements. At some point near the completion of this dossier, parents will schedule a home study with a social worker. To complete this, the social worker will visit the home and interview the parents on at least one occasion. They must also have access to any other residents of the home. While there is some variation in the questions asked of parents, one important question that is widely addressed in the home study is, “How do you plan to address your child’s Chinese identity?”⁶

Parents often take this question at face value and accept the idea of “Chineseness” as a fact of citizenship and genetic descent. However, there are many ways in which Chineseness can be understood. Andrea Louie addresses the contested notion of Chineseness in her ethnography, *Chineseness across Borders* (2004). Louie examines the ways in which Americans of Chinese descent experience identity as they return to China on “roots” tours sponsored by the People’s Republic of China. Louie argues that she is a “‘living oxymoron’ who fits neither into the category of ‘foreigner’ nor ‘Chinese [though she is ‘racially’] a ‘descendant of the dragon by virtue of [her] black hair and yellow skin’” (2004:14–15). Clearly, for Louie, race, in the sense of Asian physiognomy, is an insufficient marker to be “fully” Chinese. Rather, she sees Chineseness as something that can “be stretched to include the many people of the diaspora and at other times to distinguish one group within the category from another”; for example, Chinese from the Chinese American other (2004:21). Moreover, she “takes Chineseness to be an open signifier, a fluid and contested category that encompasses a

diversity of political, 'racial' and ethnic meanings within shifting and varied contexts" (2004:21). For the agencies with whom I worked, Chineseness is rooted in a link to China as homeland, and tourism and travel offer parents, typically not Chinese, a way to incorporate China into their families and establish those bonds. As part of the adoption process, parents are introduced to the importance of helping their adoptive child(ren) to negotiate their identity as a child adopted from China.

While older adoptive approaches (particularly those for Korean children adopted in the 1980s) encouraged assimilation, adult adoptees have argued that this attempt to erase important racial and cultural differences has been deeply problematic, often leaving them feeling confused and frustrated (Cox 1999; Kim 2005; Pertman 2000). As Korean adoptees have matured, they have addressed the ways in which they were sometimes made to feel ashamed of their heritage or felt their Korean heritage was downplayed to teach them that they were no different from anyone else. This left some children with the feeling that they were or should be "as good as white." Over the past ten years, adult Korean adoptees are returning "home" on heritage tours to Korea. As Eleana Kim explains, this has resulted in a complicated relationship between the Korean state, which views adoptees as part of the global Korean "family" and as a productive link to the global economy, and adult adoptees, who typically seek a more personal experience and do not necessarily feel a nationalistic tie to their "homeland."

As a result of the Korean experience, adoption agencies, social workers and government authorities have promoted practices that are designed to help parents incorporate elements of Chinese culture into their family life. Given that most adoptive parents are not Chinese, travel and a connection to China are articulated as critical to the construction of a feeling of Chineseness. For many parents, this means collecting souvenirs (red threads) and photographs of the initial trip—memories for children who are too young to remember. All of the parents I interviewed and travelled with had a pre-determined list of expected purchases for shopping in Guangzhou. While, of course, these lists do vary, several items nevertheless appeared again and again, and all served as commodified (and very often gendered) signposts of the adoption process, the act of becoming parents and, more specifically, the act of becoming parents of adopted Chinese daughters. For example, while China souvenirs abound, many of the stores are filled with frilly dresses, hair bows and pink and red silk *qipao*, traditional Chinese dresses. For many parents, purchasing the special-issue "adoption" Barbie (available only by

travelling to the White Swan hotel)⁷ constituted an important "memory" and introduction to western notions of femininity for their new daughters.

On my first adoption trip to China, I accompanied a group of adopting parents on their two-week trip to China to meet their children. An adoption agency introduced me to Liz because she needed a travelling companion. Her husband was staying home to care for their three biological children, including two daughters, ages 10 and 12, and a four-month-old son who had quite unexpectedly arrived in the midst of their adoption preparations. Liz was comfortable about caring for her adoptive child but was anxious about travel to China. Consequently, she was eager to have me accompany her. In addition to Liz and me, our group included seven married couples and Kathy, who was travelling with her sister because her husband was also at home caring for their older biological children. In addition to Liz and Kathy, one other couple, Dave and Dana, were in their first marriage and already had children. Three couples were in their second marriages, and at least one of the spouses already had grown children; one of these couples was adopting from China for the second time. The remaining three couples were first-time parents who had no biological children because of fertility problems. All of the participants were white, except for one interracial couple, where the woman was born in Taiwan but had grown up in the United States. This group was among the first to be processed under the new U.S. citizenship legislation.⁸ Only three out of the group of 18 had already been to China. None of the parents expressed having had any particular interest in China before their interest in adoption, although all of the parents were pleased to have an opportunity to "see" China.

An important concern of parents while they are in China is Chinese views of their new families. For most parents, there is little chance to interact directly with Chinese people outside of their hotels, primarily owing to the language barrier, as there is only one translator per group. Occasionally, parents do meet students and others who are able to speak English. As our group strayed from the luxury accommodations so accustomed to hosting adoptive parents, the sight of nine pairs of U.S. parents and their Chinese daughters, on a variety of outings to parks, temples and markets, invariably created a stir. After I asked an older woman for directions in Chinese, her friends and others nearby realized I could speak Chinese. They were eager to finally be able to talk to parents about their reasons for adopting from China, their lives in the United States and their impressions of China.

Many Chinese people commented to me that the parents were “doing a good thing” by adopting the children and providing them with good opportunities. Chinese onlookers would frequently hold the children’s hands, grab their feet or tickle their necks and exclaim, “Xingfu” (fortunate)! Salespeople in shops and elderly ladies doing *tai qi* in the nearby parks greeted our group, asking me questions about the girls: “How old are they?” “Will they have other brothers or sisters?” “Will they learn Chinese?” “Will they return to China?” In many ways, they seemed to be asking, “Will they still be ‘Chinese?’” These questions indicate the enduring importance many Mainland Chinese continue to place on language and culture as signifiers of Chinese cultural identity, particularly for Chinese who leave China.

In between squeezing cheeks and expressing concern that the babies were not dressed warmly enough, they asked about the parents as well. “Where are they from?” “Why do Americans like girls so much?” “How much does it cost?” As I translated, this last question was particularly problematic for parents, who were now much more aware of how large both their incomes and expenses must seem to those who asked the question.⁹ Parents, who in the United States had easily answered this question, found that in the Chinese context, the question felt as if someone were asking how much they paid to buy a child. Furthermore, as Helena Ragone (1997) notes in her study of surrogacy in the United States, middle-class U.S. parents are not generally comfortable discussing market forces in conjunction with family relationships because of the seeming contradiction between the altruism of parental love and the payment for services rendered. Since transnational adoption requirements and costs make it nearly impossible for lower-income parents to adopt, adoptive parents of Chinese girls are financially secure. For this reason, transnational adoption has been implicated in a global process of stratified reproduction, whereby wealthy white families adopt children (often Hispanic, African or Asian) from poorer, developing nations (Solinger 2001). However, others have resisted a perception of adoption that is rooted in a tug of war between narratives of exploitation and rescue; instead, they seek to unpack a complex web of privilege and loss (Cohen 2007; Dubinsky 2010). Kinship tourism furthers this approach using an analysis of adoption travel and notions of home as points in which systemic connections can be seen.

Adoption travel to China requires a two-week stay in China to process the Chinese adoption paperwork in the city in which the parents are adopting and the U.S.

citizenship paperwork at the U.S. consulate in Guangzhou. One of the first public outings for the newly united families I travelled with was a trip to the Guangxi provincial notaries and adoption bureau. The group was assembled in a small room; with the aid of an interpreter, one by one each set of parents was called up to complete the necessary provincial paperwork. This was a chance for some of the parents to take pictures and have a brief conversation with the orphanage staff representing their child. Following the completion of the paperwork, the bureau director made a short speech assuring the parents that they were certain they would be good parents and wished them well. Lastly, they presented each girl with a parting gift of a string of pearls. The parents were all clearly touched and surprised by the gift.

Once the Chinese paperwork was concluded and the children were officially “theirs,” parents began to discuss the upcoming trip to Guangzhou in which they could finalize the U.S. side of the adoption. A significant part of the Guangzhou experience entails shopping, and all the parents had a list of items they considered essential mementos of both China and their adoption. As Dorow has noted, the exchange and purchase of these kinds of gifts represents not just the cultural imaginaries of American adoptive parents but also those of the shopkeepers and facilitators (2004:94). Parents planned to buy items that, for them, signified China: Chinese characters of the girls’ *English* names, mandarin jackets and stuffed panda bears. These souvenirs, along with the photographs parents take and the landmarks (both personal and historical), are embedded within a tourism industry that frames the relationship between adoptees and China. For these families, this experience of travel was the first step in a long process of addressing what they perceive to be a cultural heritage being brought into their family.

Heritage Tours

In addition to service projects, return trips, known as heritage tours, have been promoted by both the state (China) and the adoption community to construct a cultural identity by returning home. Heritage tour itineraries are typically marketed as a return “home” for adoptees and include visits to important cultural sites, cultural performances and, of course, shopping. Bridge of Love Adoption Services (BLAS) is a government-run agency that is under the auspices of the Chinese Ministry of Civil Affairs. The agency works to facilitate travel and adoption services and utilizes the notions of “home” and a Chinese “motherland” in ways that work to position the state as family. These tours

are intentionally constructed to develop the relationship between the adoptive family and China through a travel experience that builds on the first adoption trip. BLAS identifies the enhancement of these heritage tours as a major goal and states on its website:

[China Center of Adoption Affairs] will continue to organize various activities and invite the adoption agencies, adoptive families and adoptees to visit China. Heritage tours help the children understand more about their motherland and hometown and develop a *correct perspective* [my emphasis] on inter-country adoption. Through heritage tours, we can also know about the life of the adoptees abroad and the integration of the child into adoptive families.¹⁰

The passage reveals the structuring of both kinship and nation through heritage tourism (Kim 2005). The itinerary is similar in many ways to a tour that is not organized around adoption and inevitably includes iconic trips to the Great Wall, Beijing historical sites, acrobats and the Terra Cotta Warriors and *lots* of pandas. All of these are important signifiers of Chinese culture. However, some important differences exist as well. For example, adoption travel typically includes an emphasis on “culture study” in the form of small classes on calligraphy, tai qi, dance and so on. Adoption heritage travel also typically includes a visit to the adoptee’s home welfare institute and a stay at the White Swan hotel in Guangzhou, where families stayed while the immigration paperwork was processed at the U.S. consulate. Another key difference is that adoptees travel for free: only adults or other children are charged. These tours are an important expression of the goals and desires of Chinese policies. However, they have not been offered regularly, and I have only interviewed two families who participated on this particular tour.

Parents I worked with often discussed returning to China when their children were old enough to appreciate the experience. Kathy, only half-jokingly, suggested that her adoption facilitator’s next job could be facilitating reunion trips for the adoptive families that would allow them to travel and explore Chinese culture in a way they were unable to do because of the demands of their new children. Although parents acknowledge that the girls themselves may or may not be receptive¹¹ to these trips, especially during adolescence, they all considered potential return trips to be valuable and anticipated that this would help their daughters to more fully appreciate their cultural heritage (see also Louie 2004). In addition, the parents see heritage tours as one way they can celebrate the unique way their transnational family was created. Because of the closed nature of these adop-

tions, parents feel secure that their daughters will be able to return to China to explore their cultural roots without the potential complications and emotional conflicts associated with conducting a search for their birth parents. However, as Ponte and colleagues (2010) have noted, expectations and concerns often differ greatly from parent to child. Moreover, given the experiences of older Korean adoptees, who benefited from changes in Korean attitudes and state policies, there is reason to believe that the circumstances in China will change also. Contemporary DNA testing ensures that a search for birth parents is possible. Recently, there is also an indication that birth parents might, someday, want to be found. Although abandoning one’s child remains highly stigmatized, the recent expansion of Chinese “baby hatches”¹² has brought new, often sympathetic, attention to the plight of many Chinese biological parents. Some parents have been dismissed as greedy or selfish, but many are seen to be distraught and desperate because of poverty or illness. My research indicates that children who are perceived to be “disabled” represent the majority of children legally declared abandoned in many regions of China (Cohen 2007). If state policies no longer criminalize child abandonment and the government continues to welcome adoptees as lost “family,” birth parents may feel more comfortable being identified. This will be an important area for future research.

Chinese authorities have exerted a degree of influence as adoptive families have begun, through unofficial channels, to search for birth parents. One organization, Our Chinese Daughters Foundation, has pulled out of China and ended work they had begun to do aiding in searches because their “office in Beijing was constantly questioned by the police [which] was troublesome for staff and caused them to worry about their own futures ... While [they] wanted to do this important work, [they] did not want it to cause ... staff any hardships” (Waldmeir 2011). Other organizations are successfully aiding parents but, by using the “back door” (*hou men*), have not yet interfered with the formation of the “correct perspective” the state seeks. In these ways, the state works to reclaim its famously “lost daughters” (Evans 2000) but only in the “correct way”—encouraging adoptees to “come back,” constructing itself as home and mother and, through tourism, moulding a legacy of “home” in both literal and symbolic ways.

Giving Back

Half the Sky was created by adoptive parents of orphaned Chinese children in order to enrich the lives and enhance the prospects for the children in

China who still wait to be adopted and for those who will spend their childhoods in orphanages. [They] establish early childhood education, personalized learning and infant nurture programs in state-run Chinese welfare institutions to provide the children stimulation, individual attention, and an active learning environment. [Half the Sky]

With the 2005 publication of *Cultures of Transnational Adoption*, an important discussion of adoptees returning to their “roots” in search of their “homeland,” birth culture and birth families began (e.g., Kim 2005; Volkman 2005b; Yngvesson 2005). While Chinese adoptees are only now of an age to begin return trips to China in earnest, clearly their experiences will inform ideas about diaspora and third-space cultures. For the moment, other participants in organizing return trips, notably both the Chinese and U.S. governments, adoption agencies, and parents in the United States and caretakers in China, reveal much about the constructed nature of these returns.

The notion of “giving back” to the SWI and China is linked to a construction of adoptees as a gift, one that sometimes implies exchange (Dorow 2006). For example, one key challenge faced by parents when travelling to adopt is that they typically need to make a payment to the director of the SWI, often in cash, for US\$3,000 to US\$5,000.¹³ Although this is payment for services rendered and sometimes articulated as reimbursement for the preliminary medical and social costs of raising the adoptee, parents and adoption groups see it as a donation and the first step to “giving back” and helping children who remain in China. By framing it as a donation, they are resisting any accusations of commodifying children. Here, a notion of service, linked to an ideology of home and homeland through the SWI, is intimately connected to the experience of the family as they participate in adoption tourism. This is an important consideration for families who are able to return to China, who often use missionary or volunteer opportunities as the basis for their trip. I had the opportunity to accompany a mother and her seven-year-old adopted daughter, Katie, on a return visit organized by Half the Sky to Katie’s first home. Katie and her mother, along with a group of adoptive girls and their mothers, had returned to China to help build play space at a large SWI on the outskirts of Guangzhou. This idea of return is beginning to have real resonance with families who have adopted from China, as many girls are now old enough to be interested in China, their early caretakers and the children currently in residence. One afternoon, the group had time to travel freely around Guangzhou and pursue their individual interests, be it shopping, family reunions

or Katie’s return visit to the SWI from which she was adopted. Katie and her mom, Ellie, and their friend, Diane, were committed to the visit but were facing some logistical obstacles, so they approached me as a translator and travel aide. One key problem was that they wanted to phone the SWI to arrange a visit. However, this was not possible because it was Sunday and the office was not staffed. Ultimately, we got the address from the hotel, and a very friendly and helpful cab driver worked hard to locate the SWI. This is often very difficult, since SWIs are typically designed to be private and may not be particularly well known.

First, when we arrived at the SWI with no appointment, I expected we would have problems getting past the guard at the door. His reaction could not have been more surprising. An older man, he was initially surprised but relatively uninterested in our visit, until he realized that Katie had come from this SWI and was returning “home.” He knew this was the only place she had lived before her adoption, and he became very excited and called, “She’s back!” to other staff walking by. They too became very receptive to our visit. After apologizing and explaining the problems that led to our unannounced arrival, we were introduced to the resident manager, who greeted us warmly. She was not concerned or suspicious, as might have been the case years earlier, but rather was comfortable with arranging a brief visit to the infant area in which Katie had lived for roughly her first year. Katie was treated as a long-lost relative, and although she was seven, there was one caretaker in particular who clearly remembered her and her adoptive parents. Katie’s mother was revisiting memories and a place she had left seven years earlier as a very new and excited parent. Katie, frankly, seemed bewildered; only time will tell what this return meant to her. Nevertheless, the staff was eager for her to join them, for her to try speaking Chinese and to see her “roots.” It became clear from photo projects displayed on the walls that the SWI had been working with volunteers to create memory books for the children, and they had countless letters and photos from adoptive parents who had kept in touch with them. These relationships and mementos highlighted the ways in which the SWI staff had expanded their notion of family across two continents and had brought the SWI into the global economy and network of NGOs in ways that had been impossible as recently as the late 1980s. Katie’s return was an important example of how attitudes in large SWIs, which had gradually grown accustomed to dealing with western parents, agencies and NGOs, had changed since the late 1990s, when the experience of transna-

tional adoption was new and many SWIs were closed as a response to harsh criticisms of neglect and abuse.

While Kim (2005) and others have begun to look at ways in which adoptees and the state often clash with regard to discourses on “roots” and “return” in Korea, Katie’s experience illustrates a return of a very different sort. Her return to Guangzhou highlights the ways in which her Chinese caretakers certainly include her in their vision of a global Chinese community and a daughter returned to China. Under a banner of service, Katie’s and Ellie’s trip was constructed as a way to “give back to China and the welfare institutes” (in lieu of biological parents). Scholars have noted that Chinese–U.S. adoption has often been discussed as a form of gift-giving by parents, adoption agencies and government officials (Cohen 2007; Dorow 2006). As a result, parents who are planning to return to China often participate in trips that offer some venue for “giving back” to other children living in SWIs or to China more generally. In the case of Ellie and Katie, tourism provided the framework for this experience, which, over the course of a week, also afforded opportunities to return to Katie’s first home in the SWI, visit important landmarks and purchase souvenirs. In this way, an adoptive tourist experience draws on the kinship labour associated with returning home and helping family. Furthermore, like medical and environmental tourism, it constructs an experience in which the lines between leisure and work are blurred because participants’ travel is organized around a service project.

Kinship tourism can also inspire relationships that are more long-term than Katie’s. In 2002, a very successful western hospital in Beijing, based on their good relationship with their Chinese partner hospital¹⁴ and the experience of one U.S. member of their staff who had adopted from Henan Province, created a non-profit foundation that would provide medical services to the Henan SWI. Working with a small medical team from a western hospital in Beijing, I regularly travelled to this SWI in Henan Province to help document medical issues that would warrant bringing a child to Beijing for treatment. At the time of my first visit, the SWI was located in a large traditional courtyard-style brick building. The architecture was much like that in other rural areas, except that the buildings were larger and housed over 70 children. It was also next door to a senior citizens’ home. The Henan SWI was in a rural area with a large yard dividing the children’s and seniors’ residences; older children, neighbours and other children were all able to visit. On the day we were there, volunteers from a local middle school had come by to do yard work and meet with the older children in residence.

Despite a fairly strong sense of community that served older children well, resources were limited. The building was old. There were only outdoor bathrooms and no play rooms. Several children shared a crib. The bedding was worn, and there were no strollers, high chairs or toys. However, as a result of the director’s work with the central government’s Center for Adoption Affairs, he placed several children through transnational adoption and established contacts with the hospital and other NGOs to provide funding and support. Director Hou proudly showed us the new facility, which looked much like a small hospital. The SWI did relocate a few months later, and this resulted in some important improvements for residents. For example, the rooms were all within one structure, and there was no longer any need to go outside to use the bathrooms. In addition, there were improved laundry and cooking facilities, more beds and cribs, and new bedding. The grounds were well kept and had a playground. However, the effect of the new building was also problematic because the children were now residents in an institutional setting and no longer in a building that was integrated into the community. Other children could no longer drift in and out to play and visit. The senior citizens’ building was no longer readily accessible. The SWI had gained much but had lost a sense of intimacy and community in the process.

Despite some problems, Director Hou and the staff were pleased with the move. In addition to some material improvements, from their perspective, the building was impressive and created an aura of prestige and professionalism; it looked like a successful SWI *should* look. From this vantage point, it becomes clear that the building represented a relocation, not just of place, but also of identity, in this case, one of professionalism that met global standards of modern care. In discussing the importance of this building with the director and staff, I came to understand that they felt their ability to care for the children was legitimized by the construction of this type of building. Although the larger resident population in the Henan SWI certainly warranted larger spending, they had not prioritized a U.S. “homelike” environment. Instead, they felt that an institutional “home” provided better resources for their children and would better meet western expectations of care, hygiene and development and thus exemplify the multiple meanings of “home.”¹⁵ The staff and director were now proud to show visitors around, expecting (often accurately) that the new building would meet the standards of western visitors. In this way, this setting had been reconstructed, at least in part, for a particular kind of “tourist gaze” whereby the director and staff sought to show adoption

travellers a “world that everywhere shows us our own image” (Urry 2002:9).

Conclusion

Adoption NGO workers, adoptive parents and facilitators do not readily fit into conventional categories of tourists, given the underlying themes of abandonment and loss (Yngvesson 2005); nonetheless, they do reflect emerging forms of global tourism that occur in unlikely, dangerous and often “dark” destinations, such as Auschwitz-Birkenau, extinct coal mines, Northern Ireland and Pearl Harbor (Urry 2002:142).

While adoption tourists are not seeking either the leisure or recreation associated with more conventional forms of tourism, their needs for tourist items and services do constitute a kind of “‘tourism reflexivity,’ [in which] the set of disciplines, procedures and criteria enable these kinds of places to monitor, evaluate and develop its tourism potential within the emerging patterns of global tourism” (Urry 2002:142). This, in part, accounts for the choices made by Director Hou, who worked to improve the SWI in ways that he read as consistent with emerging global patterns and resources expected by adoptive tourists.

In the case of Chinese–U.S. transnational adoption, the adoptee is at once a local at “home” in China and also a tourist whose privileged immigration status and newfound prosperity highlight her position at the nexus of disparate interests and experiences of both tourism and kinship. In this way, she literally embodies the ways in which these interests may be bridged, a possibility embraced by state authorities, adoption agencies, shop owners and others who benefit from this connection. However, for Katie and other young adoptees, the opportunity to travel home can be bewildering, since they travel as tourists but are treated like family in a home they cannot remember.

In conclusion, one interpretation of kinship travel has been that these types of journeys leave traces and legacies of “home” around the world. This research looks at the ways in which Chinese children adopted in the United States experience this differently from other waves of adoptees because the notion of China as homeland is often incorporated into their family life. Moreover, many families move beyond simply discussing China and instead work to “return home” and “give back.” Not all adoptive families employ the strategies discussed here, but they are all encouraged to do so as part of their counselling from agencies and adoption groups. As we look at the example of U.S.–Chinese adoption, it becomes clear that kinship tourism is a pro-

cess through which parents travel to build their family by utilizing transnational networks, agencies and the state, all of which employ an understanding of kinship to forge familiar and similar legacies of “home.”

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Notes

- 1 The increasing acceptance of transnational and transracial families is due to many sociocultural changes in the United States: notably, the end of miscegenation laws, an increase in ideologies of equality, large numbers of Korean adoptees, and organization and advocacy on their behalf.
- 2 According to the U.S. Department of Homeland Security, 7,044 children were adopted from the Chinese Mainland by U.S. citizens, the most from any single nation. Of the

- 22,884 children adopted worldwide by U.S. parents, the second highest number, 5,865, were from Russia (U.S. Department of Homeland Security, n.d.).
- 3 The Chinese government instituted its birth planning policy (popularly termed the One Child Policy), the “one pregnancy whether boy or girl” policy (*du sheng zi nu*), in tandem with the 1978 economic policies and the drive for “modernization.” As a result of this policy in tandem with other factors, there is a significant gender imbalance in the national population (estimates vary, but it may be as high as 120 males to every 100 females). This has impacted the experience of adoption and tourism at every level because the vast majority of adoptees are female and the experience of adoption tourism is linked to books, toys, and clothes aimed specifically at girls.
 - 4 While gender is a significant factor in studies of population, kinship and adoption in China and is a subject I explore at great length elsewhere (Cohen 2007), a detailed exploration of the complex gender dynamics of Chinese–U.S. adoptions is beyond the scope of this project on kinship tourism.
 - 5 At the beginning of all interviews, I introduced myself, including my local and U.S. affiliations, and explained the nature of my research and expectations for publications.
 - 6 I spoke with representatives of five different adoption agencies, and all asked this of their clients.
 - 7 As Dorow (2004) and Volkman (2005a) have already described at length, the White Swan hotel in Guangzhou is renowned for its adoption clientele and provides an important space within which transnational adoption can be considered. However, with the move of the U.S. consulate to another neighbourhood in Guangzhou in 2013, the hotel has become less popular.
 - 8 On October 30, 2000, President Clinton signed into law H.R. 2883, the Child Citizenship Act of 2000, which mandates that, beginning February 27, 2001, adopted children will acquire citizenship automatically. In short, Chinese children can now meet their parents, board a plane, travel perhaps 15 hours and, immediately upon landing on U.S. soil, “become” Americans. The lengthy process of acquiring citizenship, much to the relief of adoptive parents, has been largely eliminated for adopted children, in marked contrast to those who fall into other categories of immigrants.
 - 9 The parents typically spend an average of US\$20,000 to complete the adoption. See Appendix A for a detailed breakdown of costs. Although expenses can be quite high, they are somewhat offset by the Internal Revenue Service adoption tax credit, which allows for an income tax credit of \$10,000 per child.
 - 10 See Rainbow Kids n.d.
 - 11 Adoptees, especially adolescents, give many reasons for being reluctant to return to China. Notably, China is linked to their feelings of abandonment and also marks them as different from their peers.
 - 12 As of June 1, 2014, International Children’s Day, the Chinese government opened up “baby hatches” so that parents could legally, and anonymously, abandon their children. This is a “radical rescue attempt to save nearly” 10,000 children abandoned annually. Importantly, as Nicholas Kristof (2014) noted in an appearance on the Ronan Farrow MSNBC show, this number has stabilized.
 - 13 This donation is a source of great frustration for parents, who need to carry large sums of cash. In addition, it has been a focal point of criticism of the process owing to allegations of corruption and trafficking. See China.org.cn 2011.
 - 14 Joint ventures are mandatory for foreign corporations. Consequently, the hospital had a Chinese partner in order to be considered private.
 - 15 I should qualify here that broader development plans may largely account for the privileging of these kinds of institutions.

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Blood, Sweat and Dummy Tummies: Kin Labour and Transnational Surrogacy in India

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Abstract: How do the actors involved in transnational surrogacy negotiate anxieties about global inequities that underpin these services? In this ethnography of transnational surrogacy in India, I analyze what I call the “kin labour” done by the Indian surrogates and the (often international) intended mother to downplay these anxieties. Kin labour includes the labour of forging ties with the baby as well as forming ties of sisterhood, sending gifts, and writing letters to intended mothers. I argue that while at one level this kin labour sustains relationships beyond contracts and across borders of race, class and nationality, at another level it ultimately reifies structural inequalities within transnational contractual surrogacy.

Keywords: surrogacy, India, kin labour, motherhood, transnational, kinship tourism

Résumé : Comment les acteurs engagés dans la maternité de substitution transnationale négocient-ils les angoisses d'inéquités mondiales sous-jacentes à ces services ? Dans cette ethnographie de l'activité des mères porteuses en Inde, j'analyse ce que j'appelle le « travail de parenté » produit par les mères porteuses indiennes et celui des mères d'intention (souvent internationales) pour minimiser ces angoisses. Le « travail de parenté » comprend non seulement les efforts pour tisser des liens avec le bébé, mais aussi d'autres formes d'entreprises (tisser des liens de sororité, envoyer des cadeaux, écrire des lettres) de la part des mères porteuses et des mères d'intention pour établir et maintenir des liens entre elles. J'avance l'argument qu'à un niveau, ce travail de parenté soutient les relations au-delà des contrats et au travers des frontières de races, de classes et de nationalités ; mais, à un autre niveau, au bout du compte, il réifie les inégalités structurelles au sein des contrats transnationaux de maternité de substitution.

Mots-clés : maternité de substitution, Inde, travail de parenté,

Introduction

Cross-border travel for accessing assisted reproductive services such as transnational contractual surrogacy remains a fraught topic (Culley and Hudson 2009; Inhorn and Gürtin 2011). It conjures up images of extremes of consumerism and commodification of relationships conventionally based on maternal love and altruism. When intended parents travel from countries in the global north to access services in the global south, there is an additional anxiety that such travel reifies global inequalities by making the bodies—and cells, organs and tissues—of people in resource-poor countries more “bioavailable” than others (Cohen 2005; Pande 2011; Whittaker and Speier 2010).¹ How do the actors involved in transnational contractual surrogacy—especially the surrogate/birth mothers and genetic/intended mothers—negotiate these anxieties?

In this ethnography of transnational contractual surrogacy in a small clinic in India, I analyze what I call the “kin labour” of Indian surrogates and intended mothers to downplay these anxieties, during and after the contract period. For surrogacy in India, kin labour includes not just the labour of forging ties with the baby but also other kinds of work—forming ties of sisterhood, sending gifts, writing letters, keeping in touch after termination of the contract—undertaken by surrogate mothers and intended mothers. In her pioneering work, cultural anthropologist Micaela di Leonardo (1987) introduced the concept of “kin work” to refer to the

conception, maintenance and ritual celebration of cross-household kin ties, including visits, letters, telephone calls, presents and cards to kin; the organization of holiday gatherings; the creation and maintenance of quasi-kin relations; decisions to neglect or to intensify particular ties; the mental work of reflection about all these activities. [442]

Di Leonardo's concept of kin work made visible an array of tasks culturally assigned to women. Maintain-

ing contacts and a sense of family, di Leonardo argued, takes “time, intention and skill” (443) and should be recognized as work. Revealing the actual labour embodied in what we culturally conceive as love and considering the political uses of this labour helps to denaturalize kinship ties and highlight the gendered forms of labour inherent in forming and maintaining kinship ties.

Building on di Leonardo’s concept of kin work, I use the term *kin labour* to capture the whole range of labour performed by the surrogates and intended mothers to establish and maintain ties not just with the baby but also with each other. In the narratives of surrogates, the kin labour manifests both as *khoon paseena* (the metaphor “blood-sweat,” often used for hard labour) of maintaining kin ties with the baby and, more specifically, *khoon aur paseena* (“blood and sweat of giving birth”). Intended mothers, in turn, mirror these narratives by emphasizing their genetic connection with the baby and the labour and pain involved in their journey of assisted reproduction. Much like the kin ties forged with the baby, surrogates cherish the ties of sisterhood forged with intended mothers, whether in the form of an exchange of letters, emails or material gifts. While some intended mothers maintain these ties, most prefer to terminate the relationship with the contract.

Travel across (literal and metaphoric) spaces and boundary-crossing are central to the kin labour performed by the two sets of women and key to the forging and maintenance of ties. The intended mothers travel across the globe and traverse real geographical borders to fulfil the desire for a genetic tie with their offspring. Surrogates may not cross any physical borders, but their kin labour requires the crossing of several other boundaries. Surrogates traverse boundaries of race, nationality, class, religion and caste to forge kin ties with the fetus they are gestating, as well as with the intended mothers. I argue that while at one level the kin labour of the surrogates and the intended mothers sustains relationships beyond contracts and across borders of race, class and nationality, at another level kin labour ultimately reifies structural inequalities within transnational contractual surrogacy.

India as the Destination for Commercial Surrogacy

The Indian case represents an especially interesting site because it is the first country in the global south with a flourishing industry in national and transnational commercial surrogacy.² India is not the only country to experience transnational surrogacy. Clients from countries where surrogacy is either illegal or restricted (such as Britain, Japan, Australia, Taiwan and Kuwait)

have hired surrogates in the United States to bear babies for them. But, while the total cost of such transnational packages is roughly US\$100,000, in India such packages cost less than one-third of that price.³ Although commercial surrogacy is not illegal in India, there are currently very few guidelines regulating the procedures, the contract or the surrogate–client relationship. As a consequence, intended parents are able to take advantage of the client-friendly policies of private clinics and hospitals where doctors are willing to offer options and services that are banned or heavily regulated in other parts of the world. Typically, countries treat commercial surrogacy with utmost caution. Some, like China, France, Germany, Italy, Saudi Arabia, Switzerland, Taiwan and Turkey, have taken the prohibitive approach and banned surrogacy in all its forms. Others, for instance, Australia (Victoria), Brazil, Canada, Hong Kong, Hungary, Mexico, South Africa and the United Kingdom, allow only altruistic surrogacy.⁴ In the United States, surrogacy is not regulated by the federal government but through a combination of legislative actions and court decisions. This legal inconsistency among states means that clients who are unable to access surrogacy services in their own state can travel to more surrogacy-friendly states, such as California.

The Indian structure is close to the free-market model of surrogacy in California. Fertility clinics like Armaan (a pseudonym for the clinic I studied) are free to take or reject the suggestions made by the Guidelines for Accreditation, Supervision and Regulation of Assisted Reproductive Technology (ART) issued by the Indian Council of Medical Research in 2005. In November 2010, the council submitted a final set of guidelines for the ART Act to the law ministry.⁵ But, until now, clinics have continued to work informally and can, in effect, make or break their own rules. Thus, Armaan clinic has its own informal set of rules for recruiting surrogates: the woman should not be older than 40 years, should be medically fit and should have a healthy uterus; she should be married with at least one healthy child; and, finally, she should have her husband’s consent.

Economics and the absence of regulations, however, are not the only forces motivating clients from countries like the United States, Canada, Spain, Germany, Sweden, South Africa, Britain and Japan to come to Armaan—the hub for transnational surrogacy in India. An additional factor is that the clinic runs several surrogacy hostels. Here the surrogates are under constant surveillance during their pregnancy—nurses and hostel matrons monitor their food, medicines and daily activities. Elsewhere I have discussed the disciplinary tactics used within these hostels to produce what I have labelled the

“perfect mother worker” (Pande 2010a, 2010b). By 2014, the clinic claimed that it had delivered around a thousand babies through surrogacy.

Researching the Field

This article is part of a larger research project on commercial surrogacy in India, for which I conducted fieldwork between 2006 and 2013 (Pande 2014). My research has included in-depth, open-format interviews with 52 surrogates, their husbands and in-laws, 12 intending parents, three doctors, three surrogacy brokers, three hostel matrons and several nurses. In addition, I conducted participant observation for ten months at surrogacy clinics and two surrogacy hostels. The interviews were in Hindi and in the local language of the region and were conducted either in the clinic, in the surrogacy hostels where most surrogates live or at their homes. I have used pseudonyms for all places and people.

The doctor and the nurses introduced me to my first round of respondents—surrogates in the clinic. Thereafter, the surrogates referred me to their friends, family, brokers and women who had already delivered. To maintain the surrogates’ privacy, I refrained from taking photographs (unless the surrogates wanted me to take photographs with them), and I obtained their consent before starting any recorded conversation. Some surrogates refused to give me their real names, while some did not want me to tape record them. Then there were others who insisted on being recorded and even got offended if I recorded their friends’ narratives and took only handwritten notes on their comments. In cases where respondents felt uncomfortable having their narratives recorded, I took extensive handwritten notes, which I typed immediately afterward. Over the course of time, most surrogates not only talked to me willingly but often asked me to sit by their bedside during their rest-hour and started telling me their life experiences without any prompting.

All the surrogates in this study were married, with at least one child. The ages of the surrogates ranged from 20 to 45 years. Except for two surrogates, all the women were from neighbouring villages. Fourteen of the women said that they were “housewives,” two said they “worked at home,” and the others worked in schools, clinics, farms and stores. Their education ranged from none (illiterate) to high school level, with the average surrogate having approximately an early middle school level of education. The median family income of the surrogates was about Rs2,500 (US\$50) per month. For most of the surrogates’ families, the money earned through surrogacy was equivalent to almost five years

of total family income, especially since many of the surrogates had husbands who were either in informal contract work or unemployed. Transnational clients had hired 30 of the surrogates in this study.

During my fieldwork, I engaged in formal research activities conducting interviews with the doctors and surrogacy brokers, preparing questionnaires for nurses and brokers, and collecting demographic information on the area from local libraries. But I also had lunches and teas with the surrogates and their families, smuggled in teatime snacks for surrogates, prayed with them and cooked lunches for them in the surrogacy hostel. After months of constant interactions with the surrogates, I found myself immersed in the intricacies of their lives. This immersion got even deeper when I got an unexpected opportunity to revisit the surrogacy hostels, yet again, in 2011. My new status as a married and pregnant woman generated lively discussions on motherhood, bodily changes, emotional upheavals, labour pains and marital relationships—topics the women were reluctant to discuss with me when I was unmarried, hence, in their words, naive and inexperienced. My pregnancy was celebrated enthusiastically by the women but, inadvertently, highlighted the poignancy of their “surrogate” pregnancy. This prompted a heated discussion on “wasted” kin labour, that is, labour that goes unreciprocated, a concept I discuss in a later section in this article.

“It May Be Her Eggs but It’s My Sweat and Blood”: Gestational Mother–Child Tie

In classic kinship studies, nature and biology were often assumed to be the foundational bases for kin relations (Strathern 1992). While other “kin-like” relationships (e.g., kin relations formed through adoptions and common residence) were discussed in different contexts, links established through reproduction were assumed to be special and distinct from these other relationships. In the last few decades, many scholars have destabilized the essentialist and naturalized assumptions of kinship studies by emphasizing the *context* of these relations (Levine 2003; Peletz 1995; Strathern 1992). Surrogacy, especially gestational surrogacy where the surrogate is implanted with someone else’s fertilized eggs, provides a perfect opportunity to destabilize any assumptions around kinship ties and to pay attention, instead, to the “paradox and ambivalence in kin ties” (Peletz 1995:360). This reproductive option, for instance, creates three possible categories of mothers: the biological mother (the woman who contributes the ovum), the gestational or womb mother (the surrogate) and the social or adoptive mother (the woman who raises the child). In princi-

ple, as separate elements, none of the three—being an egg donor, a provider of gestational facilities or a post-natal nurturer—is sufficient ground for acknowledging the connection as a relationship (Pande 2009; Ragone 1994; Roberts 1998; Strathern 1992). How do the surrogates negotiate these ambivalent relationships on an everyday basis?

The doctors and nurses constantly highlight the contractual nature of the surrogate's mothering role and her transience and dispensability as a mother. The surrogates are periodically told that their role is only as a vessel, they have no genetic connections with the baby, and it will be taken away from them immediately after delivery. To reduce maternal attachment, the surrogates are discouraged from breastfeeding the baby. These discourses, however, do not go unchallenged. The surrogates resist these discourses of disposability by forging kin ties with the baby.

Parvati, hired by a couple from Mumbai, is 36 and one of the oldest surrogates at the clinic. I met Parvati in 2006, immediately after a fetal reduction surgery (a common procedure recommended by the clinic for surrogate mothers pregnant with twins and triplets). Parvati tells me that she was against the fetal reduction surgery:

Doctor Madam told us that the babies wouldn't get enough space to move around and grow, so we should get the surgery. But both Nandini *didi* [the genetic mother] and I wanted to keep all three. We had informally decided on that. I told Doctor Madam that I'll keep one and *didi* can keep two. *After all it's my blood even if it's their genes.* And who knows whether at my age, I'll be able to have more babies. [Emphasis added]

Parvati believes that, despite having no genetic connections with the baby, it is her "blood," and she uses this connection to make claims on the unborn baby. Divya makes a similar claim. But in addition to the substantial ties of blood, Divya also emphasizes the *labour* of gestation and giving birth—her "sweat" ties with the baby—as another basis for making claims on the baby. I bump into Divya right after her second ultrasound:

Anne, the woman from California who is hiring me [the genetic mother], wanted a girl but I told her even before the ultrasound, coming from me it will be a boy. My first two children were also boys. This one will be too. And see I was right, it is a boy! *After all they just gave the eggs, but the blood, all the sweat, all the effort is mine. Of course, it's going after me.* [Emphasis added]

For Divya, it is not just the substance tie of blood—one emphasized by Parvati—but the sweat ties or kin labour

done by her that become a basis for making claims on the baby. This sweat (*paseena*) and blood (*khoon*) tie between surrogate and fetus is often advocated by the surrogates as stronger than a connection based solely on genes. Sharda is one of the few surrogates who also breastfed the baby that she delivered, which she feels intensifies her ties with the baby.

I am not sure how I feel about giving the baby away to her [the genetic mother]. I know it's not her fault that she could not raise her own baby [in her womb] or breastfeed him. She has kidney problems. But she does not seem to have any emotional ties or affection for him either. Did you see when the baby started crying, she kept talking to you without paying him any attention? She keeps forgetting to change his nappies. Would you ever do that if you were a real mother? When he cries, I want to start crying as well. It's hard for me not to be attached. I have felt him growing and moving inside me. I have gone through stomach-aches, back aches and over five months of loss of appetite! I have taken nearly 200 injections in my first month here. All this has not been easy.

According to Sharda, her substantial ties with the baby (blood and breast milk), as well as the labour and effort she has put into gestation, make her more attached to the baby than the genetic mother is. She criticizes the genetic mother's lack of concern for the newborn baby. Sharda believes that since the genetic mother has not put in the labour of gestation and giving birth she is incapable of feeling the emotions of a "real" mother. Deepa, like Sharda, was "permitted" to breastfeed the baby. Deepa's story is unusual. Her Japanese clients had trouble arranging the legal papers required to take the baby back home and requested Deepa to take care of the baby in the interim period. For two months, Deepa looked after the baby under the doctor's supervision. Deepa talks of her "daughter" with a smile on her face:

She is my first baby girl. I have two sons and I always craved for a girl. *I know she looks Japanese but I think of her as my own daughter.* Well, it was different for me. I had her with me for not just the nine months [of pregnancy] but even after that. The two months we had her with us, I pampered her, you don't know how much! I splurged on pink clothes, matching mittens and shoes. All out of my money, not money sent by them! She was on my breast for two whole months. Jessy and I did not want her to take the bottle ... I miss my daughter, you don't know how much. [Emphasis added]

Deepa is one of the few to mention the racial difference between surrogates and the babies they bear. But this difference does not erode her kin claims, and even though the baby “looks Japanese,” Deepa thinks of her as her own daughter. Deepa’s kin ties are forged by the labour of gestation and breastfeeding, as well as taking care of her as if her own, even after the contract period.

The kin ties forged with the baby cannot be dismissed as illiterate women’s ignorance of modern technology. The surrogates understand and recognize that they have no genetic connection with the baby but, nonetheless, emphasize the ties they have with the baby because of shared substances, blood and sometimes breast milk. In addition, for Deepa, Divya and Sharda, the basis for making claims on the baby is not just shared substance but the labour of bearing and breastfeeding the child.

“It Is My Creation, She Is Just Keeping It Warm”: Intended Mother and Child Tie

Previous scholarship on surrogacy has described the “kin-claiming or maternal claiming practices and rituals” of intended mothers’ attempts to construct and embody the pregnancy through a whole range of practices, like reading pregnancy guides, managing all the medical appointments related to pregnancy and even dreaming “pregnancy dreams” (Teman 2010:120). These practical strategies were supplemented by a vigorous assertion of their genetic connections to the unborn child. Vanya, an intended and genetic mother from Dubai, is Indian by origin but was born and raised in Dubai. She confesses that she was looking for a Hindu surrogate mother to carry her baby but simultaneously asserts that religion is irrelevant for her since the baby is “her [the genetic mother’s] creation”:

I was looking for someone who is a Hindu, from a good culture. But then I said, why worry? Her [the surrogate mother’s] caste or religion does not matter because it is actually just our child. She is just keeping it warm, in a way. I might not be creating it inside my womb, but it is my creation—my eggs and my husband’s sperms.

Vanya has a conflicting interpretation of the role of her surrogate mother. She confesses that she wanted the surrogate to be from her religion (Hinduism) but in the same breath emphasizes that the surrogate’s role was merely to keep the child “warm”—much like an egg in an incubator. Intended mother Karen, from Canada, has a more fluid interpretation of the genetic connection than the “old-fashioned” emphasis on genes and acknowledges that with new technologies claims of kinship have shifted:

See, with these new technologies you never know how the genes are being mixed and what is ... umm ... happening, you know, to the child. I am not so old fashioned that I’ll keep talking about how the child is my genes. But it’s not just about genes, it’s much more; the child is my dream and it’s my intention, my determination that is pushing this through. Think of it this way: I have risked millions of injections [for egg retrieval] to get this started. I came all the way here. Look outside, who in their right minds would come to a place like this! I did and all alone. I am sitting in this godforsaken clinic, in a strange land, away from my family. I am thinking of this day and night, working on it day and night. Sure, I can’t feel it move inside me, but does that matter?

For Karen, the kin labour involves not just the bodily pain of medical interventions but also the dangers of crossing into unknown territories just to get one’s own child. Anne, an intended mother from California, legitimizes her kin claims in a similar tone:

People travel to the U.S. to get a surrogate and here I am travelling out of it into some place as far as India. My friends think I am very brave to be travelling to this country. I mean if you take one look at the streets outside, you would know why ... And isn’t that why you [academics] call us intending mothers—because it is the intention that makes one a mother!

Much like the surrogates’ narratives, the narratives of intended mothers emphasized the kin labour—the intention and determined pursuit of surrogacy, across borders and against all odds. The clinic, in turn, facilitated the kin claims of the intended mothers by offering a range of products appropriate for intended mother–child bonding at different stages of the pregnancy. In my last visit to the field in 2013, the doctor introduced me to two surrogacy-related products—the dummy tummy and the sound belt. The dummy tummy is a fake tummy manufactured in India by a soft-toy manufacturer and is allegedly supplied by the clinic staff to intended mothers who want to keep the surrogacy a secret from their families and want their families to believe they are the ones carrying the baby.⁶ But it has other purposes. Lara, an intended mother from the United States, enthusiastically relates another use of this product:

This is what I used to feel a connection to the baby and the pregnancy. As she grew, I grew. It is such a fantastic invention. I would run my hands around my swollen belly and I almost felt like he [the unborn child in the surrogate’s womb] could feel me. This is a way for me to bond with the baby even when I am sitting so far away.

While the dummy tummy helps Lara feel connected to the unborn child growing in the gestational mother's womb, the sound belt is expected to let the unborn baby bond with his/her intended mother. The sound belt is a prenatal music belt that the surrogate can wear around her belly through which the intended parents can "share" their choice of music as well as make the unborn child familiar with the voices of the intended parents. Lara recalls the many evenings she spent just recording lullabies and dialogues for her surrogate to wear in the belt:

I know it sounds silly to some but I want him to hear my voice. I have recorded all the lullabies that my mother used to sing for me. All she has to do is just wear it around her waist and sit. I have recorded stories, our stories, how much we love and want him as well. Once he comes out, he will know who his real mom is!

Much like the surrogates, who cannot depend on their gestational role to automatically determine kin ties with the baby, intended genetic mothers do not assume that their genetic connection automatically gives them the status of "real" mothers. In fact, kinship ties are ritualized through a whole range of kin labour, whether through discursively reiterating their own contribution to the creation of the baby or by using a variety of products to establish attachment during the gestational phase. But as important as the kin claims on the baby are the ties forged by the women with each other.

"It's a Relationship Made in Heaven": Laboured Ties across Borders

In the early literature on kin relations in North India, kinship often appeared as a bounded sphere closely structured not just by patrilineality (lineage organized around descent in the male line) and patrilocality (residence with husband's kin group), but also caste endogamy (Madan 1981). North Indian kinship was often portrayed as immutable connections and caste-based exclusion (Carsten 2000). Other scholars, especially anthropologists and ethnographers, have provided powerful criticisms of such a linear, textual and formal discussion of culture (Dube 1986; Jeffery et al. 1989; Vatuk 1975). The limitation of such rigid models is that they can only characterize "a very confined sphere of social relations while excluding most of everyday life and everyday interactions that occur beyond these groups" (Lambert 2000:89). Kinship bonds are not simply an enactment of unambiguous cultural codes but are experienced as ambiguous and fluid, and hence need to be reconstructed, renewed and "kept viable through a myriad of reciprocities: nurturance, labour, ceremonial participa-

tion, shared locality and simply company" (Bodenhorn 2000:143). It is the *labour* of being related rather than biology that "marks out the kinship sphere from the potentially infinite universe of relatives who may or may not belong" (143).

Scholars have previously discussed the many ways by which surrogate mothers negotiate their ties with the intended mother (e.g., Ragone 1994; Teman 2010). But for the surrogates living in isolation in surrogacy hostels, with little interaction with their family, the kinship ties forged take on a whole new meaning. Much like the kin ties forged with the baby, the ties with the intended mother become central to their thinking about surrogacy. These ties allow the surrogate not just to cope with the emotional isolation but also to challenge the medical construction of their relationships as merely contractual and easily disposable. Parvati highlights the labour of maintaining kinship ties within surrogacy and talks wistfully about her relationship with the intended mother. Parvati seems to be confusing what she hopes will happen in the future with reality. Although she has not delivered the baby yet, she speaks about the important role she plays in the baby's life, as if it has already happened.

My couple [intended parents] keep such good relations with me. After delivery, Nandini didi [the genetic mother] brought him [the baby] over to me and let me breast-feed him. She sends me invitations for his birthdays. She called me when he got married. When he gets fever she calls and says "Don't worry just pray to god. If you want to see him we'll come and show him to you." I am so lucky to have a sister like her taking care of me. I see how the rest of the surrogates in the clinic get treated.

Curiously, although Parvati calls her relationship with the intended mother "just like between sisters," she recognizes the status difference. Most surrogates echo Parvati's claim that the relationship was like that between sisters but simultaneously recognized the power difference. The inevitable narrative is "She calls me *didi* (sister) and I call her *barhi didi* (elder sister)," where the hiring sister is referred to as the "elder" and the hired sister is the "younger." Parvati explains,

I know Nandini didi is younger than I am but I prefer calling her didi [elder sister]. She used to call me didi as well. But it felt strange because she is from a foreign land, so educated, so well dressed.

In Parvati's case the kin labour performed by her didi, which includes allowing her to breastfeed the baby and sending her letters and invitations to the baby's birth-

days, verges from merely fictive to fantasy. But some of these ties are actually sustained, sometimes even across borders of religion and nationality. This is the case for three surrogates, Salma, Divya and Deepa.

In my first meeting with Salma, one of the few Muslim surrogates at the clinic, I confess I was surprised by her intimate relationship with the intended mother, Preeti, a Hindu non-resident Indian from South Africa. Salma responds by giving me a lecture on politics and religion in India.

Why are you surprised? There is no Hindu–Muslim disharmony amongst the common people. This has been created by the politicians. All their brain is in their *kursi* [throne]. They are making profits and giving us a bad name. Look at Preetididi. She is not a Muslim; yet, she wanted to keep *roza* [a fast that Muslims observe during their festive season] on my behalf because I can't keep it when I am pregnant. Our relationship is not dependent on our beliefs. We feel a much stronger bond. Sisters don't need to be from the same mother, right? We are like sisters, just one Muslim and one Christian. I think she is Christian. I haven't asked. But I know she is not from India.

Salma gives more sanctity to her kin ties with the genetic mother than to the bounded sphere prescribed by caste and religious endogamy. The ties of sisterhood between the two women seem to be based on the labour and effort made by the women to maintain these ties; for instance, the Hindu genetic mother follows a Muslim ritual to bond with her sister. While Salma's sisterhood ties traverse religious boundaries, some ties are maintained across borders of race and nationality. Divya, a former surrogate, emphasizes the continued effort made by Anne, the intended mother from the United States, to maintain a relationship even after delivery. Divya shows me the diamond earrings and the toys Anne has sent from the United States for Divya's infant son, Shalin.

We are very lucky. No one has got a couple as nice as ours. It's not just because she is a white lady that I say that. She has become such a close friend that if she calls us, we'll even go visit her in Los Angeles and now we won't have to worry about staying in a hotel. I am sure they will take care of Shalin's health, education; everything.

While Divya hopes that her kinship ties with the intended mother in California will change the life of her family, Deepa believes her relationship with her clients from Japan is based on mutual respect and reciprocity. Deepa reminisces about the intended mother, Jessy:

Jessy came to visit me during the *godh bharai* ritual [a baby shower organized by the hostel matron for all surrogates], showered me with gifts and gifted Rs1500 (US\$30) for my children. It's been three years and today she [the baby born out of surrogacy] would have been three years old. I wished Jessy in the morning on computer and they sent me pictures. You know, they paid me Rs1.5 laks (US\$3000) extra out of happiness and gifted me a laptop when they came to take the baby. Now I can email them using that laptop and they send me pictures by email.

In Deepa's case, the kin labour is not just based on material gifts. She recalls the day the clients came to fetch the baby:

When Jessy came and took the baby in her arms, she started crying out of happiness. And you won't believe it, but she kept pointing me to the baby and saying, "See, this is your mom." I know the baby did not understand what she was saying to her but it meant a lot to me. So many clients say "This is your aunty." But Jessy said "This is your mom."

Jessy's symbolic gesture of calling Deepa the "mom" and Preeti's efforts in keeping a religious fast in solidarity with Salma, her surrogate mother, are powerful, albeit rare, instances of kin labour of intended mothers that did not involve material gifts. While almost all intended mothers mirrored the surrogates' narratives and downplayed the monetary and contractual nature of the relationship, material gifts continued to play a key role in their interpretation of kin labour. Intended mothers often emphasized their generosity and all the payments made in cash and kind, payments that are not required by either the clinic or the contract. Preeti talks about her decision to gift a piece of land to the surrogate:

I am a doctor myself and I have really been busy the last few months. I did call my surrogate everyday in the beginning and then it became a weekly or fortnightly call. But I won't forget her after the delivery. We plan to send her gifts every year on my child's birthday ... I want to buy her a piece of land on top of all the cash. I know my husband thinks I am being silly but I want to do it for her. I won't call it charity. She has given me a lot. But we have given her a lot as well. This should get her life all set.

Preeti accepts that she is unable to reciprocate her surrogate's kin labour on a regular basis but believes that she overcompensates for it through monetary gifts. While Preeti states that her gifts are not "charity," many others deployed explicit narratives of charity and mission whereby intended mothers framed their deci-

sion to choose a surrogate in India primarily as a desire to contribute toward a worthy cause.⁷ Scholarship on transnational adoption has indicated that adopting parents often evoke similar narratives where the desire to adopt children is constructed as a form of international aid (Briggs 2003; Cartwright 2005; Volkman 2005). Ideologies of rescue, care and compassion are rampant in accounts given by people involved in transnational adoptions. Curiously, even in the absence of the “abandoned child in need of being rescued,” transnational clients of reproductive services seem to give similar accounts of “moral adoption,” whereby adopting children from the so-called Third World was perceived as a responsibility of socially conscious citizens (Briggs 2003; Volkman 2005). These narratives of charity, in some sense, are in stark contrast to the instances of kin labour that are based on mutuality or reciprocity in the surrogate-intended mother relationship. But an even starker challenge to these laboured ties sustained across metaphoric borders is what the surrogates label relationships gone to “waste.”

Many intended parents, apprehensive that the surrogate would change her mind about giving the baby away, prefer to sever all ties with the surrogate. These are the cases the surrogates label a “waste,” kin labour that has gone unrecognized and unreciprocated. Tejal was hired as a surrogate by a non-resident Indian couple settled in the United States. When I meet Tejal in 2011, she recalls the delivery day rather bitterly.

There was a lot of problem with the delivery and I had to have 15–20 bottles of IV in just two days. Ultimately, I got a scissor [Caesarian section]. I was unconscious when the couple came and took away the baby. They didn’t even show it to my husband. The baby would have been three years today. But I don’t even know what he looks like. I used to think they would invite us to America. I used to think of her as a sister—all of it went to waste. Forget an invitation, they did not even call to see if we are dead or alive. They just finished their business, picked up the baby and left.

Tejal is not the only one to claim that her kin labour has been wasted. Sudha delivered a baby to a couple from Mumbai, India. She recalls the day of the delivery:

The couple and the family had become like a family to me. They treated me very well throughout the pregnancy. But on the day of the delivery, their *tevar* [“behaviour”] started changing. First, they were reluctant to let me see the baby. When the nurses brought her over to me, she [the intended mother] started instructing the nurse to give me pills, to stop

my breast milk! I had just delivered her baby and all she could think of is that I should not be allowed to feed the baby!

Munni, who delivered a baby for an Indian couple settled in the United States in 2007, has a similar tale. Like Sudha, Munni is bewildered by the change in her client’s behaviour immediately after the delivery,

My party was from America but they used to come here [to the city] to visit their parents. They would call me every day from America and come visit me almost every month. They even allowed me to breast-feed the baby. They always said that, when the baby grows up they would tell her about me, about her second mother in India. It’s been over a year now; she would have been one year old last week. There have been no phone calls, nothing. I don’t know what has gone wrong.

Munni seems surprised by the sudden severing of ties. Her relationship with her clients was unusually friendly while she was carrying their baby. But once she completed her contract, her reproduction became a classic example of alienated labour. Her clients honoured the capitalist contract; they paid her and appropriated the surplus value of her labour—the baby.

Conclusions

Globalization, new technologies and increased mobility of people have expanded and altered mainstream assumptions and conceptions of family, kinship and motherhood. Undeniably, commercial surrogacy poses many challenges. Giving birth to a child in exchange for money and giving it up right after birth defies the hegemonic model of motherhood, whereby the birth or gestational mother is assumed to be the permanent social mother. When surrogacy takes on transnational dimensions, new complexities emerge with ties between the gestational and genetic/social mother crossing boundaries of class and even race and nation. In this article, I analyzed how real actors negotiate these new challenges to kinship and motherhood. The surrogates negotiate these challenges by constructing new bases of kinship. For surrogates, the labour of gestation and giving birth, as well as the continuous labour required to maintain kin relationships with the baby, replaces genes as the primary determinant of kinship ties. Intended mothers have a different, yet equally powerful, narrative for making kin claims on the baby. Here again, kinship ties are ritualized through a whole range of kin labour—the continuous emphasis on the importance of genes and intention in the creation of the baby, as well as the use of a variety of products, like fake tummies and prenatal

music belts, to establish attachment during the gestational phase.

In addition to the laboured ties (based on sweat and blood) with the baby, surrogates work hard to establish kin ties with the intended mothers. Although most surrogates recognize the immense class difference between the intending couple and themselves, they often construct relations in their narrative or fantasy that transcend transnational and class differences. This was reflected in Parvati's fantasy that the couple would continue to treat her like someone special and that she would participate in all the important ceremonies, the child's birthdays and marriage, like any other family member. Divya believes that she has built a long-lasting friendship with the couple. Whether real or imaginary, the surrogates are able to construct kinship ties with women from outside their class and, sometimes, national boundaries. Some intended mothers reciprocate this kin labour, but most prefer to monetize it. Unlike the surrogates' emphasis on labour, intended mothers emphasize their missionary motive or their excessive generosity toward the surrogate mother. Such narratives accentuate and reify the structural differences between the buyer and the seller of surrogacy services.

While seemingly powerful challenges to a naturalized conceptualization of kin ties, even the laboured forms of kinship have their own irony. As indicated in the narratives of the surrogates, not all kin labour is reciprocated. In fact, very often, the labour put in by surrogates in maintaining kin ties with the intended mothers goes to waste. Many intended parents decide not to correspond with their surrogates after delivery. In fact, in some extreme cases surrogates wake up after their Caesarean deliveries only to discover the babies have been taken away. Very often, at the end, the surrogates' kin claims on the baby do not prevent it from being taken away from them.

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Notes

- 1 Anthropologist Lawrence Cohen (2005) used the phrase "selective bioavailability" to describe how certain people's bodies are mobilized for the purpose of disaggregation into cells, tissues and organs to be used by science and medicine. Cohen used the term in the context of transplant tourism, where *bioavailability* becomes just another phrase for poverty and discrimination.
- 2 In the absence of a national registry, there is no reliable information on the number of assisted reproduction clinics offering surrogacy in India. Some recent studies have estimated the industry to be worth as much as US\$400 million

(Kohli 2011). Many Indian clinics report that surrogacy arrangements have doubled in the past decade, with most of the demand coming from international clients and non-resident Indians. According to the National Commission for Women, there are about three thousand clinics across India currently offering surrogacy services (Kannan 2009).

- 3 In the United States, clients of commercial surrogacy can expect to pay a total amount between \$60,000 and \$100,000. The gestational surrogate gets between \$20,000 and \$25,000, donor eggs cost \$4,500 on average, and donor sperm typically costs \$300 on average (Twine 2011). In India, the breakdown is estimated to be \$2,500 to \$7,000 in surrogacy fees and \$100 to \$150 for donor eggs; the total costs reportedly range between \$20,000 and \$35,000.
- 4 See Susan Markens (2007:24) for a tabular summary of comparative international laws on surrogacy.
- 5 In January 2013, the home ministry laid out another list of guidelines or "clauses" that need to be followed if foreign nationals are to be issued a visa for surrogacy (Rajadhyaksha 2013). A clause that is likely to have a serious impact on the transnational market, especially the growing clientele of gay foreigners, is that only couples married for two years and those whose countries recognize surrogacy can apply for a medical visa for surrogacy. It is still too early to speculate on the effects.
- 6 One can get dummy tummies in several sizes in order to simulate different months of pregnancy. One set costs around US\$20 (Rs1,000).
- 7 I have discussed this in more detail in my previous works (e.g., Pande 2011).

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“Souvenir Babies” and Abandoned Homes: Tracking the Reproductive Forces of Tourism

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Abstract: Reproduction occurs through processes of tourism and travel and across borders. This article explores the phenomenon of Euro-American women as mobile social actors bearing children out of relations with local men in Costa Rica and the various material-relational effects of their reproductive decisions. By looking at the pregnancies and bicultural children born out of transnational relations from various actors' perspectives—foreign mothers, Costa Rican fathers and townspeople—contestations over the social and cultural meanings and motivations for cross-border reproduction become apparent. “Reproductive mobility” depends on how places are imagined and can lead to new opportunities for, as well as new inequities and rifts over, kinship formation.

Keywords: global tourism, mobilities, reproduction, reproductive tourism, transnational motherhood

Résumé : Les voyages transfrontaliers peuvent constituer des facteurs de reproduction. Cet article explore le phénomène des femmes Euro-Américaines en tant qu'acteurs sociaux mobiles portant des enfants suite à des relations avec des hommes locaux au Costa-Rica, ainsi que les divers affects matériels-relationnels de leurs décisions liées à la reproduction. En observant les grossesses et les enfants biculturels nés de relations transnationales, à partir des perspectives de divers acteurs — mères étrangères, pères costaricains, et citoyens — les contestations relatives aux significations et motivations sociales et culturelles de la reproduction transfrontalière deviennent apparentes. « La mobilité reproductive » dépend de ce que l'on imagine des lieux, et peut mener à de nouvelles opportunités, aussi bien qu'à de nouvelles inéquités et dérives à l'égard de la formation des liens de parenté.

Mots-clés : Tourisme mondial, mobilités, reproduction de tourisme, maternité transnationale

Introduction

Tourism has a reproductive force. Like many single women in the 21st century setting out on long-haul travel abroad while in their “reproductive years,” 25-year-old Adele left Canada to backpack through Latin America for several months. Four years later, over the course of several visits to Costa Rica, Adele had experienced multiple, shifting relationships to the community, townspeople and nation—as a tourist, foreign resident, business owner, landholder, undocumented worker and transnational mother—before returning permanently to Canada. In the process, she abandoned the cement foundations of a home she had started to build in Costa Rica. As I would observe when I conducted fieldwork in a small village on the Caribbean coast, by 2011 hers was among several partially built homes of foreigners now grown over with weeds that left a visible testament to the presence and reproductive agency of the many Euro-American women *extranjeros* (“foreigners”) who had formed connections of relatedness, or tried to, with local people (see Figure 1).¹ Bicultural babies with kin ties to Costa Rican fathers and local families, along with the dwellings that were intended to house them, were a tangible corporeal-material outcome of women's embodied travels and their participation in sex, intimacy and motherhood away from home.

Adele first travelled to Costa Rica on an organized tour. She returned for a second visit a few months later to visit a Canadian friend who was living with her Afro-Costa Rican boyfriend.² During that second visit, when Adele's interest in “the local boys” (her term) was piqued, she hatched the idea that she too might live and work there. As a single, heterosexual, young, white foreign woman she began to regard the local men as exotic and sexually attractive and also as gatekeepers to the local Caribbean culture she longed to know intimately. Returning to Canada to quit her job and tie up other loose ends before she returned once more to Costa Rica on the standard three-month tourist visa, this time Adele



Figure 1: One of many unfinished house foundations to be seen in the area—serving here as a visible trace of women's reproductive mobility. Author's photo. By permission from owner to use the photo.

aspired to remain in the country beyond that legal proviso.

It was during that third visit, in 2007, that I first interviewed her. Adele was "obsessed" (her own term) with an evasive young man, a local surfer popular with foreign women. Describing her torment in being stymied in her romantic interest in him, she expressed a pervasive feeling among Euro-American tourist women. Many women tourists I interviewed were fascinated by the young male townspeople and, in staying beyond the duration of a holiday, would discover that local men were interested in foreign women for reasons that, initially at least, conflicted with their own interest in holiday romance. As Adele put it, "They want to have sex with you or they want to have babies with you." When I asked if she could imagine herself as one of the many foreign women, visible in the public spaces of the village and on the nearby beaches, who have had children with local men, Adele had resisted the suggestion: "No, I don't think so!"

But at that time the reason she rejected the idea of having a child with a local boyfriend was because of what she perceived as *machismo*. She did not believe that notions of Caribbean and Latino masculinity could allow a local man ever to be faithful in a relationship. Over time, while living in the community, however, her views on sex, marriage and family changed (also see Frohlick 2013b). She began to view the town as "a perfect place" to raise a child, whether alone or in a partnership. The reproductive potentiality of sexual relations was such that she found herself thinking, "If I want to have a baby, well, I'm just going to have one!"

I draw out how Adele's transformation—from not being interested in local men, to having a piqued interest in them that was a prime motivation for returning, to eventually having a child with one of the town's "players"—can be seen as a trajectory where travel and reproductive aspirations closely intersect. In 2009 Adele had given birth to a daughter. During my second interview with her then, she recounted her experiences as a white, middle-class Canadian mother raising a biracial child whose black Afro-Caribbean father and family members were involved, especially the grandmother and aunties. However, the transnational family that she had envisaged aloud in that interview did not pan out. When the baby was a year old, Adele left Costa Rica with her boyfriend for Canada to try and build a life with him there. But her boyfriend had soon returned to his family in Costa Rica. By 2011 Adele was raising their child on her own, choosing Canada over Costa Rica for her principal domicile and therein severing everyday ties with her daughter's Costa Rican kin. She sold her land and the weed-infested house foundation to another foreign woman, who was hoping to finish the construction and share the home with her Afro-Caribbean boyfriend.

Adele's story—and the abandoned dwelling and local kin left behind—illuminates especially clearly what I am calling in this article the "reproductive forces" of tourism. The main point I explore is how global tourism and transnational/lifestyle migration are processes that profoundly impact human reproductive activities (Browner and Sargent 2011:1), which, in turn, affect entire communities. That women's travel practices have an impact on procreation and wider reproductive patterns is not something we commonly think about, but it is the case that pregnancies, abortions, child-bearing and child-rearing are all outcomes of the intimate and sexual relations that ensue within contexts of international travel and being away from home. Yet these experiences have not received much attention by anthropologists, where debates over sex tourism have tended to be concerned with a much narrower concept of sex than that which allows reproduction issues to surface (Frohlick 2010). Following anthropologists Browner and Sargent, who argue that it is by examining "local, regional, state and global structures as they shape and in turn are shaped by reproductive behaviour, [that] we gain new insights into the means through which men and women exercise initiative and intent" (2011:2), I focus on the particularities of how Euro-American women have generated reproductive desires and realized those desires by using their agency (bound with race, class, gender, sexuality and nationality) in the Caribbean region of Costa Rica, a middle-income Latin American country. I

situate these occurrences in the wider context of globalization, the politics of reproduction and the ways in which international leisure travel as population movement gives rise to new forms of “stratified reproduction” (Colen 1995).

Gender, Travel and Reproduction

To put the situation in Costa Rica exemplified by Adele’s story in perspective concerning interlinkages between gender, international travel and reproduction, looking briefly at other scenarios is helpful. During the colonial era, European women were routinely sent to colonies as brides for colonial men to reproduce the nation (McClintock 1995; Stoler 2002). Since the 20th century, “mail-order brides” and Internet-mediated international marriages have resulted in east–west and south–north flows of women from the Philippines, South Korea and Russia to form marriage ties with men in Australia, Canada, Germany and the United States, many of whom wish to have children with women who enact “traditional” femininity (Constable 2003). More recently, relatively elite women in the market for fertility treatments and new reproductive technologies buy travel packages to sun and holiday destinations like Barbados, India or the Czech Republic to combine vacationing with in vitro fertilization (IVF) treatments (Speier 2015; Whittaker and Speier 2010) or go to other select countries where travel is affordable and the laws governing medically assisted pregnancies and surrogacies are more advantageous than the laws in their home countries (Melhuus 2003; Pande 2015; Spar 2005).

These various cross-border practices of procreation, changing across time and place, each involve the movement of women across international borders in their realization: colonial brides, mail-order brides, reproductive tourists. Gendered mobilities, where women are agentive travel subjects, have been at the centre of global reproduction historically, and the articles in this themed issue so powerfully demonstrate the contemporaneous phenomenon. Yet offspring born out of Euro-American tourist women’s participation in transnational sex and intimate unions are distinct from colonial forms of bride migration and Internet-mediated international marriages, and they are also distinct from late-capitalist forms of reproductive tourism, the focus of my article.

Recent debates about reproductive tourism (also referred to as fertility tourism and procreative tourism) have drawn attention to the ways in which “new forms of patient mobility” are manoeuvred within contemporary ever-changing travel routes that create distances for some and shrink distances for others (Bergmann 2011:282). Reproductive tourism is “a practice in which

people travel significant distances, often across national borders, in order to access such reproductive technologies and services as in vitro fertilization (IVF), gamete (sperm and egg) donation, sex selection, surrogacy and embryonic diagnosis” (Martin 2009:250). Although the literature to date focuses on assisted pregnancies or surrogacy for infertile couples or fertile single women and lesbians in need of sperm donations, reproductive tourism is a category that Martin believes “may even, arguably, include transnational adoption, abortion and conception” (2009:250), which I agree with to some degree. Facilitated by globalization, citizenship-based travel mobilities and consumer capitalism, reproductive tourism exists because some women (and men) are privileged in their capacities as reproductive tourists. That is, they are empowered as passport holders and by their relative wealth to embark on “fertility journeys” (Hudson and Culley 2011) and “global quests for conception” in search of reproductive technologies, knowledges and substances that are unavailable, unaffordable or too restrictive in their home countries. These journeys can nevertheless be difficult and even disempowering experiences of “exile” (Inhorn and Patrizio 2009:904). My interlocutors were seeking neither medically assisted conception nor access to international adoption and, as such, were not patients or clients purchasing a legal service. Nevertheless, as I suggest, they were entangled in globalization processes allowing them “more ways to conceive and bear children that go beyond the limits of national and cultural boundaries” (Martin 2009:262). However, there are also important limitations to seeing them as reproductive tourists, which I return to in the conclusion.

This article sorts through some complexities of cross-border procreation and pregnancies made possible by global tourism and raises new anthropological questions: Is this an example of tourists extracting resources from the native people in sun-sea-sand-sex destination countries (Cabezas 2009) but, instead of transactional sexual exchanges, which predominantly but not exclusively involve tourist men as sexual consumers (Frohlick 2013a), we see reproduction as a form of extraction by foreign women? Or, because tourism, as “asymmetrical movement between different “locals” (Amit 2007:2), is a process that is thoroughly permeated with supply-and-demand for touristic intimacies (Harrison 2003), should we be surprised that global tourism shapes new kinship formulations and the creation of reproductive possibilities, especially when relatively elite women in their “reproductive years” are mobile social actors as international travellers? How are “souvenir babies,” a term that I will explain, related to other forms of reproductive

tourism where women acting as “reproductive opportunists” (Whittaker 2011) cross national borders for the purpose of accessing reproductive technologies and bio-substances?³

As I begin to document and analyze the nuances of reproductive mobilities, I view Euro-American tourists, transnationals and expatriates as gendered reproductive social actors using travel and cross-border sexual and intimate sociality as a means to ameliorate personal concerns about involuntary childlessness and to realize reproductive dreams. More specifically, women from the global north can be seen as reproductive agents with aspirations for “natural” (not medically assisted) pregnancy, “mixed-race” bicultural children and transnational residency. In the rest of the article, I provide an ethnographic account and analysis of how global tourism and tourism-informed mobility—what sociologists call “lifestyle migration” (Benson and O’Reilly 2009)⁴—has impacted the human reproductive activities of Euro-American women and also how, in turn, local processes in the Caribbean region of Costa Rica have influenced these practices. In doing so, I offer some preliminary answers to these larger questions.

Ethnographic Context

This article builds on my ethnography about Euro-American women’s relationships with Costa Rican-born men and migrant men in Costa Rica and the ways heterosexualities and erotic desires are produced and transformed in touristic spaces and cross-border encounters (Frohlick 2013b). I have conducted fieldwork in Costa Rica since 2005 and continue to do so as my research has evolved to pursue different aspects of sexuality, intimacy and tourism over these past eight years. For the first four years, I focused on understanding the dynamics of these cross-border relations largely from the perspective of European and North American heterosexual white women (although several of my interlocutors were black women and bisexual women). I also conducted interviews with local men and got to know several local men fairly well, thus gaining knowledge of their lives. However, my emphasis has been on foreign women’s experiences, allowing me to maintain long-term ties and form enduring friendships with several interlocutors and to gain a longitudinal life course perspective as they have changed and gone through phases as girlfriends, spouses, mothers, daughters-in-law and ex-partners separated from their children’s fathers.

I have published several articles addressing different aspects of tourist women’s experiences of transnational sex and romance in Costa Rica (see Frohlick 2007, 2009,

2013a). This is the first article where I draw explicitly on knowledge gained over time about Euro-American women who became mothers in the course of their travel and relocation trajectories. These are post-holiday stories related to transnational sex. They recount a different set of experiences that are nevertheless related to those of the short-term-stay tourist women who hook up with local men and understand these sexual relations through the framework of spontaneity, much like other aspects of their holiday experience. The ethnographic details in this article are gleaned from interviews with women conducted between 2005 and 2010, some who were already mothers and some who were not yet mothers at the time of the interview but who would eventually have children out of unions with local men. I also use ethnographic material from interviews with local Afro-Costa Rican women conducted between 2008 and 2011 as well as from conversations in situ since 2005 about the topic of motherhood with Euro-American women whose children are Costa Rican and who have become my friends as well as research interlocutors.

I piece together these fragments of ethnographic details gained over time because I see this as an important topic worth thinking through and entering into the conversation about kinship travel with the caveat that further ethnographic research is under way to gain a fuller account. For instance, women who left Costa Rica permanently after becoming pregnant are missing from this picture yet are lodged in the memories of many local men whose stories call attention to the absence of their children begotten with foreign mothers.

Costa Rica Imagined as a Possibility for Procreation ... Naturally

Costa Rica is seen as a safe destination for solo women travellers, which, in combination with its trope of nature, is a powerful draw (Frohlick 2013b; Frohlick and Johnston 2011). Along with its reputation as an “exceptional” and peaceful Latin American country, Costa Rica is stitched closely to an “aesthetic of pristine unpeopled nature” (Ackerman 2010:412), thereby promising an array of embodied experiences within rejuvenating spaces that are represented as remote from civilization. Branding itself as an ecotourism destination with “no artificial ingredients” (Rivers-Moore 2007), which carries implications for the growing medical tourism industry, Costa Rica has become transformed into a “feminized healing landscape” of happy, caring nurses, massage therapists and altruistic doctors (Ackerman 2010:411). Although no women I knew travelled to Costa Rica for cosmetic surgery or other medical procedures, many were drawn



Figure 2: One example of how the trope of nature is deployed to create a “healing landscape” (Ackerman 2010:411) in Costa Rica. Author’s photo.

to the spiritual and health tourism found in an abundant cottage industry of yoga retreats and spas. “Pure nature” looms large in tourism media and in tourists’ imaginations of what Costa Rica provides, in contrast to the cement, technology and artificiality that constitute everyday life in cities back home in North America and Europe (see Figure 2). I suggest that this particular gloss of how the local community and spaces are understood through such a “tourist imagination” (Crouch et al. 2005:1) extends to how women eventually came to understand their reproductive subjectivity and agency in the national and local Caribbean context.⁵

Costa Rica is located on an isthmus with the Pacific Ocean to the west and the Atlantic Ocean to the east. The Atlantic-Caribbean side is imagined as a particularly fecund—and hedonistic—space, depicted as a “wild jungle” contrastive with other, “tamed” regions. Like many western backpackers since the 1980s, who actively produced the “Caribbean” as much as they “discovered it” (Anderson 2004), Euro-American women in the 2000s preferred the Caribbean because it promised closer

contact with local Afro-Caribbean culture than did the “over-developed” “Americanized Pacific” (words often used by the women to describe the Pacific region). The “laidback vibe” of the Caribbean culture offered apparent opportunities to transgress the conservatism of dominant Costa Rican society. Non-normative heterosexualities in the form of sexual and romantic encounters with black Afro-Caribbean and mixed-race (*mulato*) local and migrant men from backgrounds much different from their own—often much poorer, with fewer opportunities for formal education—yet with a shared cosmopolitanism and mutual attraction, could be realized in such spaces (Frohlick 2015). The cultural and economic underpinnings of these local–tourist relations, where some men aspired to have babies with foreign women as a means to secure economic ties, in addition to essentialized, primitivized masculinities both performed by local men and imagined by foreign women (Frohlick 2007), rendered the Costa Rican Caribbean a place of possibility for “natural” procreation.

Amid the diversity of the Afro-Caribbean, *Tico* (Spanish word for Costa Rican national), expatriate and Central American immigrant resident population in the southern Caribbean, white foreign mothers and their brown- and black-skinned children were visible around the town and nearby beaches. When I was there in 2010, one of my interlocutors, Cynthia, referred to a “baby boom” taking place. In her view, more foreign women than ever before were pregnant out of relations with local men, influencing one another to take advantage of the reproductive possibilities available to them because of how the men’s own interest in “sowing their seeds,” bound up with *machismo* notions of masculinity, aligned with the women’s wishes to have their children. Not all local men who go out with foreign women hold this interest, as I will show. Yet a salient procreative mythology that circulated widely among foreign women was that local men, especially but not exclusively Afro-Caribbean men, wanted babies with foreign women. With condom usage not widespread, the chances for a “natural” pregnancy were seen as much greater than in women’s home countries, where condom use was more prevalent.⁶

These trajectories of natural procreation, often couched as “an accident” or “surprise” but also in more agentive terms, were in some sense in alignment with the nation’s reproductive governance (Morgan and Roberts 2012). Strongly influenced by the Catholic Church and international pro-life organizations, the government takes a pronatalist, non-interventionist position on women’s reproductive rights, while at the same time promoting smaller nuclear families headed by married

heterosexual couples as an index of “greater national development” and “higher morality” (Goldade 2011:559). Although contraceptives and tubal ligations are available under the national health care system, abortions are not allowed. In 2000 IVF was banned, making the country one of the strictest with respect to the reproductive governance of its citizens and immigrants (Morgan and Roberts 2012).

Within a country that champions “natural” (medically unassisted) and “planned” rather than “uncontrolled” pregnancies (Jenkins 2002), foreign women both aligned with and contravened societal norms. Because foreign women were having babies without medical intervention (i.e., natural conception), they aligned with the state’s ideal reproductive narrative. But because they were forming families outside the ideal nuclear (and monoracial) family upheld by the Catholic vision, they also contravened these norms. In this way the notion of “circumventive routes” (Bergmann 2011) might apply to Euro-American women whose own championing of conception, pregnancy and childbirth “the natural way” circumvents less desirable options for child-bearing available for them as women who had rejected marriage or partnerships back home and who felt that age was diminishing their chance at conception. Morgan and Roberts cogently state in their article about reproductive governance in Latin America that “the activities of the biological body—especially the reproductive and sexual body—are at the centre of these regimes and are hence critical sites of contention” (2012:242).

I now turn to two examples of how touristic imaginations of a natural Costa Rica, as well as migration as an impossible quest for “the good life” (Berlant 2011), shaped the reproductive mobilities of Euro-American women.

“It Just Seemed Natural to Have a Brown Baby”

While Adele waited until she was in a union to plan a family, other tourist women fostered the possibility soon after, or even before, their arrival. Mattie was a white German woman who moved to Costa Rica after she had holidayed in the southern Caribbean. She articulated her decision to start a family with an Afro-Caribbean man through the cross-cutting discourses of a paradisaical Caribbean and transracial motherhood. Mattie travelled to Costa Rica for the nature. In hearing that, in her words, “25 per cent of the country is under conservation,” as a 25-year-old backpacker she found that nature conservation proved to be a powerful moti-

vator in her destination choice. Because she had always been enchanted with what she imagined as a Caribbean landscape—“the smells and the flowers and the fruits”—as well as Caribbean culture—“everywhere music and merengue and people really poor but they have such a lifestyle that the whole time they’re happy”—once she arrived in Costa Rica, she headed straight to the Caribbean coast. Early on in her travels she had envisioned starting a family, ideally with a black Caribbean man. In her words,

Well, first time when I came [to Puerto Viejo], I remember that I tell my Caribbean brother [friend], I tell him, you know when I’m going to be 25 [years old], I’m going to be living here and I’m going to give birth to a little boy and he is going to be mixed black and white. He’s going to grow up here on the beach.

When she did become pregnant, which Mattie regarded as an “accident”—the result of an “adventure”—after learning that the father was black, her white family in Germany urged her to have an abortion. Meanwhile, the father, a second-generation Afro-Costa Rican, distanced himself from Mattie because he doubted the baby’s paternity. Mattie’s parents, reeling from the news of a “half-black” grandson, refused to communicate with Mattie for some time. Eventually, Mattie and the child’s father formed a live-in, off-and-on union for several years, during which she had another baby with him. Once the union ended, Mattie was resolved to remain in Costa Rica. Buying land and building a house, she forged roots in the local community both to allow her children to grow up in close contact with their father’s kin—grandparents, aunts, uncles, cousins and half-siblings—and to fulfil her childhood dreams of living in the Caribbean.

When I interviewed Mattie in 2007, she explained to me how “natural it was to have brown babies” as a foreign woman in the Caribbean. The sense of “natural” with which she understood her reproductive choices (for instance, her choice to ignore her sister’s advice to abort the pregnancy) stemmed from her understanding of local reproductive practices. In this sense, Mattie’s interpretation of “natural” referred to reproductive choices deemed normal within the local context that contrasted with the stigma Mattie experienced back home for having a mixed-race child and an unplanned pregnancy as an unmarried mother. For a European woman in her reproductive years, the Caribbean Costa Rica promised her a better life than what she could expect back in Germany. This “better life” was defined partly

by her desire to integrate into the Caribbean community and her resistance to racism and to her parents' belief that "monoracial, monocultural and monoethnic families are assumed to be the norm" (Twine 1999:729). Yet, while engaged in "transracial mothering" (Twine 1999), when her son became seven years old, she had begun to question her earlier romanticized notions of a paradisiacal life in the Caribbean. Concerns around the influence of his half-brothers, who were involved in sex as adolescents and the youth scene of partying, drugs and alcohol, heavily influenced by tourism, had made her think about returning to Europe as a better environment for raising children.

I turn to one further example before providing a glimpse of how transracial pregnancies and foreign women's reproductive activities were received by the local townspeople. Cynthia's story is similar to those of many of my interlocutors who were in their 30s, single, financially independent, established in careers and single when they travelled to Costa Rica. They spoke of their disillusionment with the realities of heterosexual dating back home, where online dating proliferated and men were consumed by their digital electronics and other commodities, and of the ways decisions made in their 20s, not to have children, now negatively affected them. Motherhood seemed an uphill battle given the apparent futility of future marriage or relationship prospects. Some women were pondering international adoption as a viable route to single motherhood at the time of their travels to Costa Rica.⁷

When I interviewed Cynthia in 2005, she had first travelled to Costa Rica three years earlier. Now she was making plans to relocate from the United States to Costa Rica's Caribbean coast, to buy land and build a home. After travelling back and forth between her business and home in the United States to vacation in Costa Rica and continue a relationship she had started with a local man on her first trip, Cynthia was ready to make a more permanent move. As we spoke, I began to see how her reproductive activities and desire to become a mother were entwined in her assessment of Costa Rica for its potential for realizing a life for herself (a single, professional, white American woman) that could be much better than what she felt was dead-end dating and consumerism back in the United States. While she had broken up with her Costa Rican boyfriend before I met her, she was deeply invested in remaining in Costa Rica—in good measure because the area held potential as a place to have children and start a family. In her words:

I see myself doing my project here and, you know, having a child. Not that I really have to have it myself, maybe, maybe not, but that's something I would like to have, a family. You know, it's ... Although, I think I see myself more with a child than I do with a man right now. So we'll see. I think that one is probably going to land on my doorstep, some baby that needs a home, that's what I think. Or, you know, the idea of adopting, I'm open to that as well. I'm thirty-six. I figure in these next couple years I'm just going to see where life leads and then, who knows?

Years later, Cynthia found herself pregnant while in a casual relationship with a Costa Rican man. Her North American family, like Mattie's family in Germany, demonstrated racism and sexism in their reactions to her decision to continue with the pregnancy and to raise a mixed-race baby as a single parent, rather than in a marriage or relationship. The Costa Rican father and his kin remained in regular contact with Cynthia and made regular visits to see her and the child. In many subsequent conversations with Cynthia, I gained a sense of the ongoing negotiations that transracial parenting involved for her as she sought the lifestyle that appealed to her as an expatriate rejecting "the American dream," while under constant scrutiny by her child's Costa Rican family members for violating codes of respectability and cultural competency in mothering. Such violations included her lack of knowledge about how to properly dress the baby and avoid risks of colds or dengue fever. At the same time, Cynthia gained a sense of belonging to and admiration from Caribbean, Nicaraguan, Columbian and Panamanian women who were her neighbours. By becoming a mother through natural conception (where "accidental" pregnancies are a common, legitimate means of human reproduction), Cynthia was no longer alone, and therefore her neighbours were greatly relieved—for to be alone was seen as significantly more stigmatizing and pitiful than raising a mixed-race baby as a single mother.

As the stories of Adele, Mattie and Cynthia are meant to show, the desire for and manifestation of babies with black Afro-Caribbean men was one pathway to reproduction that was naturalized by my interlocutors. Getting pregnant "naturally" rather than through adoptions or donor insemination, a route that a few women mentioned and most were loath to embark on, meant a great deal to them. This naturalization, however, while expressive of anti-racist ideologies on the one hand, also, on the other hand, reveals racialized and exoticized undertones as well as white privilege. Euro-American

women made sense of their pregnancies through notions about destiny, inevitability and beneficence: men seemingly “gave” them the babies they always wanted and the opportunity to be mothers. The “Caribbean” was, to them, a naturally hospitable, unrestrictive and ultimately tractable place to become pregnant and have babies. These ideas contrasted with what they regarded as the limited or restrictive cultural practices back home, in the United States, Canada or Europe, where birth control and condom use was more socially entrenched and the role of men was tightly scripted into heteronormativity or the legal framework of shared parental custodian rights and therefore difficult to manoeuvre. Costa Rica, with a marketed global image as a haven for self-renewal and transformation, was recast in women’s minds as a society and place, in particular the Caribbean coastal towns and inhabitants, amenable to their maternal aspirations.

“Souvenir Babies”

As mentioned earlier, women’s reproductive bodies are “critical sites of contention” (Morgan and Roberts 2012:242), not only for the nation’s reproductive governance and bolstering of the monoracial family but also at the level of everyday life and sociality across ethnic-racial-national groups within communities affected by global tourism, such as Puerto Viejo. I explore here these cross-cultural contentions, where groups were at cross purposes regarding relatedness and social reproduction. When the privilege of international mobility, citizenship and relative wealth empowered Euro-American women to pursue reproductive quests, the meanings of their actions were not always well understood. Some townspeople interpreted Euro-American women’s transracial pregnancies as circumventive routes where the women seemingly evaded obligations to the babies’ fathers and the wider local social organization of kinship. Sometimes the mixed-race transnational babies seemed like an opportunistic transaction—almost a commodity, as I learned from a local woman who knew many townspeople whose sons had fathered children that were, in her words, “forever lost” to foreign women.

Ms Mary, a 50-year-old Afro-Caribbean mother, auntie and grandmother, whose roots to the community go back generations, illuminated a long-standing problem she had with foreign women’s reproductive practices. She used the label “souvenir babies” to describe what she considered a “style” of social reproduction that was deeply troubling to her:

Many womens [sic] come with that idea they never have a kid and they come with that idea to have a child in the Caribbean. And many of them, after they don’t have the father there for that baby but they have that baby some of them mostly they go back to their country, I say, like with a souvenir! A lot of strange womans [foreign women] have their little ‘brown babies’ by themselves, so it pass from, what do you say, a ‘little adventure’ to a serious problem ... womens very mature, but they just have the idea, too, maybe it’s a style, maybe they want to make a change, I don’t know.

Not a new term or a phenomenon limited to Costa Rica, *souvenir babies* has been used to describe different socio-historical contexts where babies are born out of cross-border, transient intimacies. Two well-documented cases of souvenir babies are the thousands of American-Asian children in the Philippines, seen to be, as one scholar puts it, “casually begotten and casually forgotten by their [American GI] fathers” (Lee 2010:167), and the children born after World War II in France out of liaisons between French women and American soldiers. In Canada, too, Ruth Roach Pierson has written about “the sexual exploitation suffered by Innu women [in Goose Bay during the 1980s], such as the increase of rape and ‘souvenir babies,’ fathered by British, American and German [NATO] military personnel” (1993:210).

In these instances, the term underscores a dominant western idea that the repository of genetic material from the father is patently recognized. As American and European military men left behind biogenetic traces of themselves, as well as bitter memories of sexual and emotional abuse, in countries such as the Philippines, babies of mixed parentage and their mothers bore “the social costs of imperialist sexual relations” (Capino 2010:57). The scenario in Costa Rica presented by Ms Mary disrupts the social history of souvenir babies as a story only about subjugated mothers in cross-border procreation. In contemporary gendered travel practices, Euro-American women are instead the itinerant subjects who now threaten the social order by “taking” genetic substance from local men and becoming mothers via the clout of mobility they exert as citizens from northern countries. Instead of being “left with,” they leave with (or are free to leave with) the souvenir babies they desire. Thus, the way that Afro-Costa Rican locals deploy the term *souvenir baby* picks up on what local people regard as the crass consumerism, self-interest and quickly formed tenuous relations tourists pursue in their intimate forays into Caribbean culture.

White women bearing mixed-race babies are sometimes regarded negatively, even slandered, for putatively “watering down” black Afro-Caribbean culture, marginalized within a country that sees itself as a “white nation” (Sandoval-García 2004). While it is also the case that foreign white women are often lauded for what they contribute to the economic well-being of local men, extended kin and the wider community (Frohlick 2013a), the problem, as Ms Mary explained, was their “style” of procreation: put simply, Euro-American women’s independence and autonomy disregard kin relations. Such seemingly hyper-mobile women who “take” the “seeds” sown by Caribbean Costa Rican men and set their sights on “brown babies” as a kind of memento of their Caribbean vacation thus serve as a volatile flashpoint that pits some women against other women (and men).

Yet these travel journeys that transform into reproduction opportunities, regarded with disdain by some of the town’s residents, could not be achieved without local men’s complicity. Accusations that tourist women are using men like “sperm donors” suggest that the men fall easy prey to the wiles of tricky foreigners, an idea that some Euro-American women contest but that others believe.

A 23-year-old Canadian and semi-permanent town resident, Isabel, enjoyed living in Puerto Viejo because she appreciated its multi-ethnic, international population. One of many young foreign residents aspiring to integration into the local culture, she shared her perceptions with me about how local men are put into positions of having to deal with foreign women who con them into impregnating them. For Isabel, a surfer who prided herself on the friendships she had formed with the local well-travelled male surfers, this happens all too often, according to the many stories she had heard over the years from her male Caribbean friends. I recount one such story, in Isabel’s words:

I have a friend, a local guy, when he was 18, he had a 29-year-old woman come for a week from Canada. Within the week, she bought him a plane ticket and he went to Canada. Spent a month there with her. She bought him new shoes, new clothes, gave him the Blockbuster card, going out for dinner every night. And it came to the end where she was like, ‘I want a baby.’ He was like, ‘Nope, I’m going back to Costa Rica.’ Jumped on the fucking plane. He was like, ‘That bitch wanted a baby.’ I was like, ‘Hell, no!’

For me, I was just like, okay, ‘you took, you know, you took ...’ (Whether I want to place judgment on the fact that he used a woman to go outside and experience, I cannot. Because he got to go outside, he got

to see the outside part of the world.) Yet, it came to a point where it was going to change his life, he said, ‘Uh uh, I’m going home.’ And, okay, I respect him for that. Whether I want to judge him for going away with a woman just because it was his opportunity, I can’t. Because in the end he made a choice; ‘No, I will not change my life, I will not do anything to do ... anything.’ The second the woman came and was like, ‘I want your baby because you’re a beautiful black man from Costa Rica and this is a good opportunity,’ you know? He was like, ‘There’s no love here. I don’t wanna have a baby with you.’

This story is fascinating to me because it contradicts the prevalent narrative about local men as *machistas*, sowing seeds with many women of different nations. Elements of Isabel’s friend’s experience, where a tourist woman attempts to bribe him to win over his biogenetic substance as a duplicitous progenitor of a souvenir baby, are also common, however. The claims about receiving a free trip abroad (“outside”), meals and all expenses paid, as a romantic ruse for a manipulative pregnancy, give credence to Ms Mary’s assertion that the affective and relational ties of local people are disregarded by childless, manipulative foreign women.

Isabel’s local male friend had managed to resist the opportunistic ploys of the cunning Canadian woman, while being opportunistic himself. Yet countless numbers of local men have negotiated, in the broadest sense of the term, monetary exchanges with Euro-American women who desire “brown babies,” want to be trans-racial mothers or merely want to get pregnant in the most non-interventionist or “natural” method available to them. Many more local men have fallen in love and then been hurt when relationships with their children’s foreign mothers did not work out as they had hoped. In short, these two groups of social actors (the foreign women, on the one hand, and the local men, on the other), involved in what amounts to highly complex human reproduction structured by economical asymmetry as well as asymmetry of mobility, are both mired in a reproductive politic that transcends their own decision-making.

In her analysis of the polemical narratives of “rescue and kidnap” that are trafficked in transnational adoption debates, Karen Dubinsky (2008) cautions against thinking about reproductive rights in terms of abstract binaries such that adoptive and birth parents are in a tug of war with one another and squeezed into reductionist oppositional categories. That circumspection is apt here: the story of souvenir babies should be interpreted neither as the agentive cold-hearted pursuit of an opportunistic reproductive strategy on the part of

Euro-American women to take Costa Rican offspring away from their Costa Rican blood kin and the victimized relinquishing of fatherhood rights by hyper-fertile Costa Rican men, nor as the savvy beguiling by desperate and cunning poor black and mixed-race Latino and Caribbean men who utilize their sexuality to get into the pocketbooks of innocent and easily duped white foreign women. Instead, the story speaks to the ever-widening means by which some men and women can initiate reproductive options as a result of globalization (in this case, global tourism) and to the resultant frictions and gaps that such global and transnational reproductive mobilities create within and across individual social actors and the local communities in which their reproductive actions are played out.

Conclusion

From a transnational feminist perspective, it becomes apparent that European and North American heterosexual women of relative privilege and wealth are in disputed relations with the local community as they are seen by some townspeople as “takers” of children who are potential kin (and national citizens of the host country). At the same time, local townspeople also admired many of these foreign women for being economically independent and enterprising and also as transracial mothers who positively challenged heteronormative monoracial reproduction, a point that I have only touched on in this article. The women I met did not travel to Costa Rica with the express intention of seeking out a Costa Rican progenitor, although I did hear rumours about many such women. For the women with whom I spoke, the possibility of getting pregnant with a local man became imaginable as they stayed on or returned, their eyes opening to a normalized feature of transnational social organization—the presence of foreign women and mixed-race children and their integration, however partial and contested, in the local community.

Whether my Euro-American interlocutors had made decisions jointly with their local boyfriend, unexpectedly became pregnant or tried to influence a local man into impregnating them, all of these actions hint at a privilege of mobility that I conceptualize as reproductive mobilities. If they had not travelled or did not have the means or the authorization to do so (e.g., the right passport), such options would not have befallen them to act upon. As women’s travel trajectories intersected with sexual and reproductive possibilities in contingent ways, such mobilities carried consequences for the other social actors implicated in reproduction. Kin relations formed through processes of international leisure travel and the geographical mobilities enjoyed by women tourists

and transnational residents moving between Costa Rica and countries in the global north were structured thoroughly by asymmetrical movement across national borders that reflects the governance of travel in late modernity. In other words, foreign mothers could travel practically at will back and forth with their children in tow, who became holders of multiple passports, while for the most part the fathers did not enjoy such privileges because of their Costa Rican passports and (often unemployed or impoverished) economic statuses that made obtaining travel visas into western countries very difficult.⁸ Moreover, the mobility of the bicultural, binational children hinged on the denial of the fathers’ paternity and paternal rights, such that some women circumvented the need for a father’s signature on a passport application for a child by not naming the father on the birth certification.⁹ It is therefore both the reproductive mobilities of the foreign mothers and their children’s mobilities that fostered ongoing incommensurabilities and disjunctures between local and translocal meanings and practices of kinship, as the trope of souvenir babies so strongly suggests. It was not that foreign women had domiciles elsewhere that was contentious to local Afro-Costa Ricans and migrant families residing in the southern Caribbean towns whom I interviewed, as they too had kin dispersed across a wide Caribbean diaspora. Rather, at the heart of the matter for local residents was the way in which the procreation took place within the context of travel mobility and, therefore, the way in which kin relatedness between the offspring and the local male progenitor and his family members was always already a mobile relationship in which they had little say to define and little power to control.

In addition, cross-border procreation (getting pregnant through relations with a local man) was a way in which “natural conception” was championed over adoption and medically assisted pregnancy. Therefore, access to travel as a regular tourist, versus travel as a reproductive tourist, provided Euro-American women in Costa Rica with opportunities to manoeuvre outside of the reproductive options within their home nation, which they felt were limited, and to explore other options as privileged mobile subjects. In doing so, they also negotiated heteronormativity because they were seen to be pursuing relations and forms of reproduction and family creation outside of the societal norms back home, as well as in Costa Rica, although in different ways. Entangled in these complex micro and macro politics of reproduction and “proper” procreation, women held up their pregnancies and child-bearing of bicultural, interracial babies on a kind of pedestal, claiming such pregnancies to be superior to the other options available to women

like themselves (in their 30s or 40s, childless and single). I felt at times it was as though the babies were a triumph of the women's canny and cosmopolitanism because they were willing to cross boundaries to acquire their brown-skinned offspring. One American expatriate woman described how, although it was difficult for her to admit, she felt superior to other foreign women without "brown babies" of their own because of what she felt was a tacit social currency—an insider status—that accrued to being a transracial mother.

The reproductive tourism advertised on websites for assisted reproductive technologies offered up as packaged tours, along with the enticing invitation to "lounge around a gorgeous tropic beach while completing your IVF cycle," is impossible in Costa Rica.¹⁰ The national socio-legal infrastructure, which limits the kinds of pregnancies that women in Costa Rica can imagine and access, places Euro-American women whose pregnancies are born out of liaisons and relationships with local men in positions of reproductive mobility vis-à-vis Costa Rican women who may have fertility quests that cannot be met within the nation. Those who wish to seek fertility treatments and reproductive technologies outside of Costa Rica may not have the resources. Other child-bearing women, such as unwed mothers, single mothers and teen mothers (Jenkins 2002), as well as undocumented Nicaraguan migrants living in Costa Rica who are subjected to tubal ligations, are held under scrutiny for their "perceived irrational reproduction" (Morgan and Roberts 2012:242).

Travel to Costa Rica may well have been an escape, a metanarrative of tourism, for women who were drawn to the safety and the promise of nature it held as a "woman's destination" (Frohlick 2013b). However, for many heterosexual women I interviewed, escape was initiated out of wanting to get away from relationships gone sour, boyfriends with work or substance addictions, and bad dating prospects and the like, by way of romantic and intimate relations. Therefore, Costa Rica represented a promise of new connections, a sense of belonging and a remaking of home. As I stated earlier, many of my interlocutors had bought land, once they had decided to make Costa Rica their primary residence, and were in the midst of construction projects to build small homes for themselves, local boyfriends and new families. Like the half-constructed foundation and its encroaching weeds depicted in Figure 1, many similar structures were visible along the roads in various neighbourhoods in Puerto Viejo and surrounding towns. Many women had held the notion that if they were going to live in Costa Rica, even temporarily, they would be having sexual relations with local men. Desires for local men, for land and housing

and for mixed-race babies were thus, in some sense, interlinked, and were also gendered and generative affective dimensions of tourism and its intimacies. I suggest that Adele's story is not unique, neither in Puerto Viejo nor in other towns and villages in Costa Rica or Latin America and the Caribbean. Countless numbers of foreign women over the past decade have had children with local men, "planned," "unplanned," and "sort of planned," according to women's interpretations of their cross-border pregnancies. In contrast to masculinist notions of touristic travel as a trope of escape from home and domestic responsibilities (Frohlick 2006; Kaplan 1996) and, by definition, of "touring," which involves by necessity a return home, Euro-American women viewed their travels to Costa Rica quite differently, as I have shown here. Rather, aspirations to become mothers and to create physical homes, as well as to imagine home as multiracial and international/transnational spaces of cross-cultural intimacy and legal and social kin ties, were inextricably linked to how they understood their travel experiences in Costa Rica as a particular place. Distinct from reproductive tourists who utilize tourism services and infrastructure in their quest for reproductive technologies and medical treatment located elsewhere, the mobility of my interlocutors as tourists enabled them to gain unforeseen ideas about the possibilities of conception and motherhood in another country. Hence, they can be seen as a prime example of how "contemporary mobilities have had a profound affect upon understandings of tourism," as Allison Hui (2009:307) has suggested in her critique of the binary between home and away that continues to be held up in tourism scholarship. As I have shown, such effects are also profoundly gendered and can and do include women's reproductive desires bound up with heterosexuality, sexual pleasure, sexual spontaneity and transnational erotics and procreative sex, as well as negotiations of condom use and "safer sex" and notions of "unplanned" pregnancies, all of which are shaped by local gender norms, social organization and formal and informal economies. Physical homes were also the after-effects of tourism and not the initial motivating reason to travel and were linked to women's reproductive aspirations and, paradoxically, to both deeply held western feelings about "home" as a particular place and site for nuclear family and also feminist resistance to those patriarchal ideas and, therefore, empowered economic independence from men as breadwinners. What remains to be examined through further ethnographic research are precisely the new forms of kinship they were creating while they resisted the heteronormative monoracial notions of family espoused back home in their European

and North American families and societies. For now, their stories reveal much about the gendered reproductive outcomes, potentialities and limitations fostered through processes of global tourism, which are, as with the consequences of globalization processes more broadly, entirely uneven and not without contestation.

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Notes

- 1 I use the term *Euro-American* to refer to predominantly white tourists, return visitors and expatriates from European and North American countries, Australia and New Zealand, a broad social category that in Costa Rica is referred to as *extranjero*, which translates to "stranger" or "foreigner." I also use *foreigner*, although in Costa Rica this term indexes any number of foreign groups, including immigrants and visitors from other Latin American and Caribbean countries. Pseudonyms of research participants are used throughout the article. Place names are not changed.
- 2 *Afro-Costa Rican* is one term among many marking the Caribbean heritage of an ethnic-racial minority population whose ancestors settled in the Atlantic region during the 19th century to work on railway construction and banana plantations. Other local terms include Afro-Caribbean, Caribbean, black, *negro*, *cholo*, *culi* and *mulatto*, each indexing relational categories of difference vis-à-vis white (also a relational category). See Vandegrift for a discussion of how the "racial/ethnic lexicon in Puerto Viejo draws from multiple referents and intertwines tightly with nation-based categories" (2008:782).
- 3 While the position of the men is not the focus of this article, it is worth raising a few questions for future research. For example, while my ethnographic research has shown that local men are also pursuing reproduction with foreign women, their reasons for doing so are not entirely clear to me although I suggest some provisional answers here. Also, local men are sometimes crossing borders, although for work and travel, and not for reproductive technologies or bio-substances. Yet some have accessed medical and cosmetic procedures, such as dental work in Germany, with assistance from their foreign girlfriends. Thanks to Frayda Cohen for pointing out these gendered dimensions to travel and reproduction that remain to be studied further.
- 4 Lifestyle migration refers to the contemporary phenomenon of relative elites relocating to idyllic places in search of a better way of life (Benson and O'Reilly 2009:609). What is important in this article is how this search for an idyllic place by my interlocutors was realized in Costa Rica by virtue of ideals of nature, health and lifestyle intersecting so well with ideals of maternity and motherhood. Babies were imagined as part of the "idyll" that shaped foreign women's decisions to live there. The conceptualization of lifestyle migration as a "project" and "search" (Benson and O'Reilly 2009:610) aligns with women's understandings of their reproductive dreams to be fulfilled in Costa Rica.
- 5 I use the concept "tourist imagination" here, following Crouch, Jackson and Thompson, to capture the loose relationship between media, the imagination and tourism practices; more specifically, the ways in which "the activity of tourism itself makes sense only as an imaginative process which involves a certain comprehension of the world and enthuses a distinctive emotional engagement with it" (2005:1). How tourists "build dreams" and "arrange practicalities," "in making journeys and in being there," is negotiated individually but also in relation to public discourses/media that construct places, as well as the boundaries between tourism (as escape, play, etc.) and the everyday (Crouch et al. 2005:12).
- 6 In 2012 I conducted fieldwork with Dr Lopez-Ruiz and research assistant Carolina Meneses (University of Costa Rica) on local sexual health practices. In interviews with 25 local people, we found that condom use was not prevalent. The reasons for this are complex and include both the prohibitive cost of condoms locally, as well as discrepant meanings for why they should be used in the first place (i.e., only for sex with prostitutes).
- 7 Costa Rica does not permit international adoptions; therefore, Euro-American women were not travelling to Costa

Rica to adopt but, rather, were thinking of travel more generally in terms of reproductive options. On the other hand, several women had become involved in informal forms of fostering local children.

- 8 It is also the case that some Euro-American women experienced tremendous difficulties in trying to leave Costa Rica with their transnational children, for instance, because obtaining the required signatures of fathers on the children's passport applications was impossible.
- 9 Thanks to Sam Wild-Chick for pointing this out to me.
- 10 Words like these appear in advertisements abounding on the Internet, such as for the Barbados Fertility Clinic, featured in the in-flight magazine for Caribbean Airlines. For example, Jacob (2011).

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Concluding Remarks: Kinship between Choice and Contestation

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Abstract: The contributors to this thematic section show women and men negotiating reproduction and family relations in contexts marked by globalization, expanding commodification, assisted reproductive technologies (ARTs) and the assertion of women's right to determine their child-bearing. These factors operate synchronically to produce new markets. New forms of "kin work" emerge as familial bonds are imaginatively established and sundered. Commodification and connection are uneasily balanced when globalization simultaneously fosters new modes of kin-making and facilitates their rupture.

Keywords: reproductive tourism, adoption, surrogacy, kin work, assisted reproductive technologies (ARTs), international commercial surrogacy, medical tourism, commodification, globalization

Résumé : Les contributeurs à cette section thématique montrent comment des femmes et des hommes négocient la reproduction et les relations de parenté dans des contextes marqués par la mondialisation, l'expansion de la marchandisation, les technologies de reproduction assistée (TRA) et l'affirmation du droit des femmes à décider de leur vie reproductive. Ces facteurs opèrent simultanément pour produire de nouveaux marchés. De nouvelles formes de « travail de parenté » voient le jour à mesure que les liens familiaux se forment et se brisent. Un équilibre précaire s'établit entre marchandisation et connexion dès lors que la mondialisation favorise à la fois l'émergence de nouveaux modes de production de parenté et leur rupture.

Mots-clés : tourisme procréatif, adoption, maternité de substitution, travail de parenté, adoption, technologies de reproduction assistée (TRA), maternité de substitution commerciale internationale, tourisme médical, marchandisation, mondialisation

The contributors to this thematic section show women and men negotiating reproduction and family relations in contexts marked by globalization, expanding commodification, assisted reproductive technologies (ARTs) and the assertion, in some contexts, of women's right to determine their child-bearing. These factors operate synchronically to produce new markets, for adoption, reproductive surrogacy, in vitro fertilization (IVF) treatment, impregnation or family bonding; to galvanize cross-national entrepreneurs; and to engender state action. At the same time, they generate new sites of kin-making: homes and clinics in which pregnant women wait to give up the children they will bear to commissioning parents, hotels in which hopeful IVF clients stay as they go through treatment cycles, tourism destinations to which women travel more or less consciously seeking sexual partners with whom they may reproduce, tours intended to foster the identification of a quasi-diaspora constituted by adopted children and their families with the children's country of origin. New forms of "kin work" emerge as familial bonds are imaginatively (and institutionally) established or sundered. Conflicts over old kin-related identities, "motherhood" in particular, take on new meanings. Emerging market relations and forms of kin-making uneasily coexist. Affective or "intimate" labour¹ may sometimes soothe the tensions among them; at other times, it seems to heighten the disjunction between the logic of family-based bonds and that of commercial and individualistically oriented instrumental exchanges.

These are issues that engage states as well as civil society. States participate in crafting kinship by regulating reproductive markets—such as those entailed in adoption, ARTs or surrogacy—defining the terms of parentage and familial status that determine, for example, who is entitled to recognition in law and policy as a "mother" or as a particular parent's "child" and establishing the legal framework for reproduction. And states erect barriers or reach across borders to promote broader

identifications linking kinship and nation (see Cohen, this issue). Thus, these essays describe contexts in which markets for baby-making are globalized; reproduction is a site for re-envisioning and reconstituting community and, sometimes, nation; and the definition and implications of motherhood emerge as a primary site of contestation. The following remarks briefly illustrate these general themes.

In her essay in this issue, Amrita Pande tracks Indian gestational carriers' kin work as they craft relations with their clients and navigate the difficult waters of bearing children they know they will have to provide to others. Parvati and Salma, for example, describe themselves as sisters of the women who have commissioned their babies. Indeed, Parvati terms herself a "younger sister," deploying a demographic fiction to describe the relationship, as, in fact, the commissioning mother is the younger of the two. Yet the reference to "younger sister" is remarkably effective, operating simultaneously on three planes. As a metaphor for social status, it acknowledges and incorporates the hierarchical relationship between the gestator and the commissioning mother. As a descriptor of biological connection, it evokes the blood nexus between the child and the gestator, which, Pande shows us, the gestators use to counterbalance and, indeed, undermine the commissioning parents' claim that their proprietary "genetic material" is the sole physiologic determinant of motherhood. And, as a statement of family connection, it removes feelings associated with respect, solidarity and love from the realm of the purely incidental or gratuitous—emotions that may or may not evolve out of a contractual exchange—and embeds them in a precise system of obligations. The violation of those feelings is, in the perspective that these surrogates describe, an insult to the deep structure of familial bonds they have worked so hard to imaginatively create.

Clients seek to situate themselves *within* the gestational process. Commissioning mothers describe, as forms of maternal labour, their attempts at physical reproduction, their travel to remote locations, their persistence at seeking to have a child. Enterprising business people have found a niche: "dummy tummies" now enable commissioning mothers to be seen by others as their future children's gestators and to imaginatively experience at least one aspect of the physical facticity of pregnancy. And "sound belts"—if actually worn by the surrogates requested to do so—will transmit to the fetus the sounds of children's commissioning mothers' voices as they sing lullabies. But even while the commissioning mothers' narratives are replete with attempts to displace the surrogates' monopoly over gestation, they,

too, seem ambivalent about interpreting the relationship in purely contractual terms. Deepa recalls her client, Jessy, saying to the baby she had delivered and nursed, "See, this is your mom." Three years later, on the child's birthday, Deepa expressed her birthday wishes to Jessy, who reciprocated by sending pictures. But, Pande tells us, in most cases the clients ultimately prefer to monetize the relationship with the gestational carriers: they read the surrogate's willingness to bear a child for them through the lens of her financial need. Talking about her decision to buy a piece of land for the surrogate who bore her child, Preeti says, "I want to buy her a piece of land on top of all the cash ... I won't call it charity. She has given me a lot. But we have given her a lot as well. This should get her life all set." This, in Preeti's view, is not charity, but it is, undoubtedly, monetization. The question is, for what?

Like the sibling metaphor that the surrogates adopt, Preeti's description of her desire to "get her [the surrogate's] life all set" (which Preeti's husband finds "silly") conveys multiple meanings. The idea that the surrogate "should" be all set in life suggests an imperative addressed to the surrogate that she really *be* "all set." In the language of contract, the purchased land constitutes a final settlement; it extinguishes a debt and allows for no further recourse. But why is such a discharge necessary? Are the payments originally stipulated by contract not sufficient? Or is the problem that they are not sufficient to achieve Preeti's objective, which, one might speculatively infer from this brief exchange, is to ensure that the surrogate not (need to) work as a surrogate again? Being "all set" with a piece of land has a specifically economic connotation. Land may serve as dowry or as a source of livelihood. As dowry, it establishes marriageability, presumably inscribing the bearer of the dowry in the moral structure of matrimonial sexual (and, hence, reproductive) relations. As a source of livelihood, the sustenance to which it gives rise is grounded in agricultural, hence *not* gestational, labour. So Preeti's phrase may be read as suggesting that Preeti hopes to extricate the surrogate from surrogacy. Of course, these reflections are purely speculative. But could the gift of land, and the closure it seems intended to effect, simultaneously signify Preeti's recognition that gestational work is not really work like any other and mark her own engagement in a particular kind of "de-kinning," to borrow the powerful phrase suggested by Pien Bos and Fenneke Reysoo (2011)? On this reading, Preeti is translating an inchoate perception of an obligation that implicates familial bonds into the clear *do ut des* of an extinguishable contract.

Preeti's discomfort is the other side of the surrogates' disappointment when the children they have borne are transported to distant homes and communications are severed. Indeed, neither clients nor surrogates quite know how to categorize the relationship that binds one to the other. Is it a market transaction? Does it establish a kinship bond? Can the aspirations—to identity, continuity, commonality/ exchange, finality and autonomy—inscribed in each framework be reconciled? And would the terms of this dilemma be different if they were not being negotiated over long distances?

Case after case involving domestic surrogacy transactions in the United States and elsewhere has pitted not only opposing legal claimants but also conflicting understandings of reproduction and the bonds to which it gives rise.² As individual actors draw on their own symbolic repertoires to redescribe child-bearing, sexuality, paternity and maternity, as well as client-worker relations, the tropes they mobilize often conflict: *transcultural* reproductive markets, whether domestic or international, generate precarious understandings of key terms, works in progress rather than definitions that can serve to obviate further conflicts. But, in *transnational* exchanges, when conflict occurs, exit may sometimes provide a more readily available solution than is practicable in domestic contexts. As Susan Frohlick's essay suggests (and other essays here substantiate), when the ground kinship rests on is marked by mobility, the threat of exit introduces a permanent note of seismic instability.

In Frohlick's analysis, Euro-American women journeying to Costa Rica invert the canonical account of sedentary women of one race being impregnated and then abandoned by transient males of another race (occupying troops, for example) and then having to grapple with the consequences of having borne children whose biracial features denote the particular circumstances of their births. Here, inspired by what might be termed a "romantic" vision of child-bearing and an eroticized view of Costa Rica, and empowered by a strong sense of their own autonomy, German, British and American women eschew ARTs and adoption and travel to Costa Rica to become pregnant "naturally" by Afro-Caribbean men, whom they see as reproductively powerful.³ Then, having established the requisite relations and borne their babies, they may decide to leave and take the children with them. The sometimes consciously sought biracialism of the babies is a value, not a stigma.

Such behaviour appears opportunistic to at least some members of the local communities with whom these women engage. In the words of Ms Mary, a "mother, auntie and grandmother": "Many womens [sic]

come with that idea they never have a kid and they come with that idea to have a child in the Caribbean. And many of them, after they don't have the father there for that baby but they have that baby some of them mostly they go back to their country, I say, like with a souvenir!" In fact, however, Frohlick describes several women who initially intend to stay in Costa Rica precisely to ensconce their child (and themselves) within local networks of kith and kin. But when unspecified factors lead them to re-evaluate the decision to remain in Costa Rica, the value of these bonds seems less salient. Just as their families of origin, against whose desires some chose to have biracial babies, could not constrain their earlier choices, so their local kin cannot compel them to remain. Frohlick notes that "both the reproductive mobilities of the foreign mothers and their children's mobilities ... fostered ongoing incommensurabilities and disjunctures between local and translocal meanings and practices of kinship." As with the gestational carriers and their clients whom Pande describes, the incommensurability that Frohlick highlights revolves in significant part around the understanding of motherhood. At issue is the independence of the woman who has the ultimate legal claim to be a child's "mother" from the community within which her motherhood has been constituted.

But as Amy Speier's analysis of reproductive tourism to the Czech Republic shows, travel does not necessarily entail crossing cultural boundaries and does not always unleash conflicts over meanings. Maureen chooses the clinic in Zlín, which Speier focuses on, because of its popularity with North Americans. "The comfort of having more people who come here and knowing that there will probably be other Americans here that I can talk to ... was a very big part of us choosing to come here." Maureen, like many of the clients of Zlín's ART services whom Speier describes, craves and finds a community made of others who not only are undergoing the same physiologic experiences but also share the same interpretive framework. The protagonists of Speier's paper are in Zlín only temporarily. They nurture no fantasies of relocation; although they may return, if their treatment is unsuccessful, to undergo further cycles of IVF or to have another child, their stays are time-bound and circumscribed by medical needs. They stay in a *penzion* whose business has been galvanized by an early U.S. client. The innkeepers successfully create an atmosphere in which Americans feel cared for, by tending to their clients with a hospitality that, Speier suggests, is not characteristic of Czech hoteliers.

This American community is grounded in the basic commonality that binds the *penzion's* guests, that is, the

experience of infertility. Infertility frames the friendships that clients establish during the weeks of their stay in Zlín and, coupled with the comfort of a shared national culture, provides a basis for seemingly immediate solidarity. That solidarity appears to rest on a shared understanding of the pain of infertility but also of the nature of the ART process itself. In the Zlín penzion, identities are clearly defined: the women undergoing treatment will be “mothers”; their male partners will be “fathers.” No fear that these identities may be contested, either by gamete providers or by the future children themselves, seems to surface in the prospective parents’ conversations, despite the growing impact of movements tending to restrict or eliminate donor anonymity.⁴ Indeed, one may speculate that the aura of safety that the Zlín penzion so adeptly creates stems, at least in part, from the fact that the Czech Republic ensures gamete donor anonymity through binding guidelines. In this context, as Speier notes, the Zlín innkeepers and their guests engage in intimate labour that introduces affective elements into the underlying commercial relationships involved in reproductive travel. That such an insertion proves effective is a testament to the already uncontested nature of both the commercial and tourist relationships involved. The tourists are prospective “parents,” the future children “theirs.” The penzion provides a supportive and temporary haven for its foreign guests, who seem to experience it more as an outpost of their own society than as an expression of Czech culture. As for the Czech Republic itself, it blends into the background, a functional site for the acquisition of particular services. In this context characterized by clear demarcations, neither national nor familial identities appear to be *en jeu*.

Not all states blur into the background of the markets they institute. China, in Frayda Cohen’s analysis, engages directly in the promotion of a quasi-diasporic identity among the families of children, primarily girls, adopted from its Social Welfare Institutes. Rewinding the “red thread” that signifies connectivity, state institutions work with the adoption community to promote “heritage tours.” Designed to foster a view of China as the children’s “motherland” and to promote knowledge of their “hometown,” heritage tours are also intended to develop “a correct perspective” on intercountry adoption, while allowing Chinese governmental institutions to gain insight into the children’s integration into their adoptive families.

These tours are not simply articulations of a top-down state policy designed to promote national identifications among child emigrants and their families. Cohen describes a transnational adoption community eager to

re-establish affective bonds. Thus, visiting the institute from which she had been adopted, seven-year-old Katie is encouraged to try to speak Chinese and to rediscover her “roots.” Along with letters and photos from parents who have stayed in touch, the institute displays the “memory books” its volunteers have created for the children who once lived there. While Katie seems perplexed, her mother, Ellie, has prompted the connection that the institute is attempting to promote. For her and others in similar situations, the visit to the institute may be intended to establish Katie’s “roots.”⁵ But, as Cohen points out, the visit (and the connections it occasions) is also understood as a way of “giving back” to China, “giving back” for the “gift” of the child who has been adopted. Unsurprisingly, when the American adoptees are asked how much their adoptions cost, they recoil. Their resistance does not indicate a reluctance to bear a financial burden (which they have already done). It centres instead on the question’s implicit characterization of the form of kin-making through which they have constituted their families. The notion of cost evokes that of a sale and, in turn, of a financial transaction whose object, the child, is an exchangeable good.

Who, then, is a buyer and who a parent, who a visitor and who a member of a community, who an obligor and who an obligee? Who decides which identity and correlative moral, social and legal rights will prevail when? Raising these questions, these essays highlight the uncertain balancing of commodification and connection when globalization simultaneously fosters new modes of kin-making and facilitates their rupture.

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Notes

- 1 Intimate labour can be understood as “work that involves embodied and affective interactions in the service of social reproduction.” See Boris and Parreñas 2010:7.
- 2 As I discuss in my essay on “Babies without Borders: Human Rights, Human Dignity and the Regulation of International Commercial Surrogacy,” numerous legal cases have highlighted the conflicting understandings regarding reproduction, and, in particular, maternity and paternity, embedded in different legal orders.
- 3 Although, in these accounts, pregnancy is sometimes described as “accidental,” it is difficult to imagine that young Euro-American women who travel to a destination more or less consciously seeking to reproduce would not have the means to either prevent or interrupt unwanted pregnancies. Indeed, Frohlick describes at least two instances in which

the pregnancies were carried forward despite pressures from the women's families of origin to end them. In this perspective, the pregnancies may be accidental, but the births are desired.

- 4 Reflecting the intensity of the current debate, the Ethics Committee of the American Society of Reproductive Medicine recently advised readers that "because the law in this area is rapidly evolving, and because it is becoming increasingly easy to conduct searches for individuals on the internet, [gamete donation] programs should make it clear to donors that they cannot give guarantees regarding immunity from future contact with offspring." See Ethics Committee of the American Society for Reproductive Medicine 2014.
- 5 As Cohen notes, both the notion of "roots" and that of "Chineseness" have been contested in the current debate regarding intercountry adoption. Nonetheless, she also suggests that adoptive families often integrate the notion of a Chinese homeland into their domestic narratives.

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Ethnographies of the Political: Honouring Malcolm Blincow

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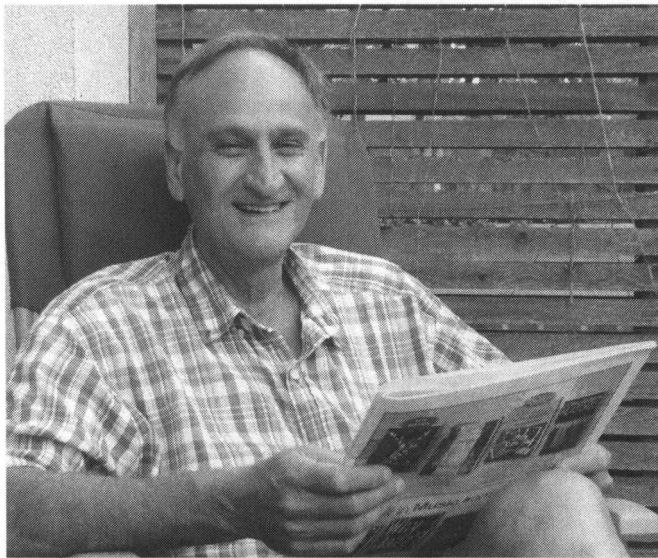


Photo by Veronica Schild.

After working for almost 40 years in the Department of Anthropology at York University, Professor Malcolm Blincow retired in 2012. To mark the moment and to honour his enduring contribution to critical pedagogy and scholarship and, most significantly, for inspiring a new generation of Canadian anthropologists, we bring together articles by Malcolm's former students that capture his keen interest and intervention in the anthropological studies of power and politics. Motivated by Malcolm and drawing from ethnographic research in Asia, Africa and Latin America, the articles individually and collectively represent a serious engagement with the question of politics at different locales and scales and showcase, as one contributor notes, the analytical and methodological salience of "rich ethnography and political economy to elucidate how broad social forces play out at the level of everyday practice" (Eramian, this volume).

Malcolm was actively involved with the intricate workings of the department, the university and, most passionately, the York University Faculty Association. Above all else he was a teacher par excellence. Teaching and research for him were not two disconnected aspects of scholarship, a wedge that our neoliberal universities wish to inscribe in their constant thirst for grant monies and cutting-edge and star-studded research and productivity. Instead, for Malcolm, teaching was a form of engaged scholarship, a long-term engagement, a commitment, an enduring relationship of learning, which stretched far beyond the walls of classroom or the university. An important element of teaching for him was patient and careful listening, an intellectual dialogue—which he had with each and every student and their work—and an ongoing quest to identify strengths in each and strive to help them do better. He was a legendary teacher, and many considered him to be a fantastic mentor, although Malcolm did not see himself as a mentor. This might seem somewhat ironic, because others

believed outstanding mentorship to be his major contribution, but, for Malcolm, mentoring implied a kind of directed learning from which he distanced himself. His pedagogical approach, regardless of his own preoccupations, was to allow students the freedom to go in their own direction. He critically read the work of both graduate and undergraduate students with utmost care, and his trademark review of your work—often returned overdue but never done without due consideration—consisted of a hard copy replete with comments and edited, typically in red, throughout. The attention to detail was frequently astounding, and receiving it was often a unique moment in learning and scholarship. He engaged with nearly every paragraph or sentence, as well as the whole; you could be sure that he was closely reading it, just as he would closely and patiently listen to you. Perhaps that is why Malcolm could never embrace the mentor-protégé model; it was far too limiting to his desire to engage, even with your footnotes, on a multiplicity of scales, contexts, historical levels, theoretical tangents and so on. His pedagogical approach was not so much that he knowingly provided *the* magic bullet to you, but rather it was through careful engagement that opened the space for the student to identify the missing piece in their own work.

Clearly, teaching was not about imparting instructions or providing templates of research but was a sustained process of learning and, importantly, inculcating a desire to learn from texts, from teachers, from peers and, significantly, from the political and historical events around us. Not only were critical engagement, listening and reflection crucial to Malcolm's teaching, but these were also the attributes that characterized him as an anthropologist. With one ear always to the ground, Malcolm paid attention to every fine detail, in fact thrived on it, embracing and encouraging a mode of fieldwork and ethnographic research that simultaneously tracked the micro- and macro-practices of everyday life. For him, a finely grained ethnography necessitated contextualization and a historically embedded sense of place. A love of history and context was nearly contagious in his presence. He would often provide a student or colleague a glimpse of his knowledge of some subject or period through a few comments or an aside, an experience much like stealing a peek into a previously unknown but vibrant cavern of events and interpretations.

Contextualization, as we know, is an important aspect of writing history, and the meaning of context resonates with its etymological roots in making something new, or a weaving together. For anthropologists, contextualization is even more vividly illustrated in their

research methods of participant observation, fieldwork and reflexivity. Participant observation as the discipline's trademark method is descriptive, but participant contextualization might have been a better, if less elegant, name. The most important aspect of participant observation is to be immersed in context, to act and feel a little like a participant so as to gain greater insights into the context of whatever is being studied. Therefore, our disciplinary practice plunges us awkwardly into new contexts, where we can attempt to grasp some of the strands of any moment woven together. With such an emphasis on context and contextualization, for Malcolm, anthropology is a fertile space for the cultivation of contextualizations, from the immediate ethnographic present to the vast sedimented landscapes of history.

In bringing students to reflect on and engage with embedded histories and contextualizations of space and time, Malcolm was frequently able to remind students not only that anthropology drew inspiration from the events around us but also that anthropological concepts, categories and theories must emerge from and respond to the changing political and economic milieu. Here, he insisted on capturing the multiple encounters that traverse different scales and locales, be they encounters in the field, encounters with our "subjects" of research, encounters between competing registers of knowledge such as between the particular and the universal or, in our institutional spaces of work, between research and teaching. For him, anthropological thinking and practice, in one way or another, were always born out of encounters in context. In attending to the encounters, anthropology was thus accountable to the *politics* of relations and interactions, describing how encounters often bring discordant epistemologies, practices, agents or ideologies to chafe each other, producing, in all instances, tensions, conflict, negotiation, accommodation, incorporation. It is this foundational attunement to the charged politics of encounters and how they constitute and reconstitute social relations, make knowledge, reproduce inequality and secure domination at multiple levels that Malcolm calls the "politics of power," which makes anthropology well positioned to grapple with the nitty-gritty, down-to-earth matters of politics.

While engaged with the politics of power operating at multiple scales (as he discusses in his interview with Daniel Yon later in this issue), Malcolm was weary of considering power as omnipresent. At a moment when anthropologists were attending to the politics of virtually anything—of place, nature, identity, sexuality and so on—Malcolm was critical of a loose and pervasive sense of power, which risked overlooking the very structural and deeply historical relations of power that shape, often

violently, the complex terrain of contemporary modernity. Instead of a casual and superficial nod to politics of power, he insisted on tracking different modes of power, paying special attention to the dense networks of political actors, noting the roles of various intermediaries and middlemen who, embedded in the formal and informal context of social organization, negotiated the charged cultural interstices of material and symbolic power. It was this keen interest in the grey zones of power that attracted Malcolm's attention the most and led him to investigate the politics of factions, political parties, nation-states and, ultimately, the formation of the imperium.

Malcolm's undergraduate course—Violence and the Making of Modernity (as Yon reveals in his interview)—is a pedagogical example of weaving together history and context and identifying the encounters that track the project of modernity. It teaches how the making of modernity “needed constantly to extend itself and universalize itself through violence.” The goal is to know “how violence gets organized” in the context of institutions, and one of the prime institutions is the military and its technologies of violence. In this light, Salman Hussain's article in this volume explores aspects of this institution through an analysis of the 2006 *U.S. Army and Marine Corps Counterinsurgency Field Manual*. The manual is part of a framework to “legally justify the use of force.” Hussain found that the instrumental use of categories of combatants and non-combatants works to “enable and justify violence on those who are ‘outside’ the appropriate categories.” He expands his historical analysis to the Palestinian–Israeli conflict and the use of drone warfare and, most importantly, how this is operationalized on the ground in Afghanistan with the cultural engineering of the Human Terrain System program. Hussain demonstrates that this categorization was put into practice, balancing authority and violence with a flow of funds directed through carefully mapped kinship and political networks. Such rewards, in the words of one U.S. military strategist, “gave us the means and political capital to motivate otherwise wary residents to help. Authority without money would have reduced us to pleading with citizens to cooperate”; counterinsurgency strategy in Afghanistan “still revolves around imposing our will on the adversary” (Crider 2009:15, 19–20).

The three articles by M. Gabriella Torres, Laura Eramian and Kathleen E. Gordon share a commonality in the sense that they are ethnographic explorations of the fallout of political events that shaped the contexts and sites in which they do their fieldwork. Thus, there

is a contextualization of the past and the present and careful analyses of the encounters that resulted in genocide or in class-based exclusionary territorial practices. Torres' work in Guatemala City after decades of dictatorship and civil war situates us in a central neighbourhood of the city, where the violence and ethnic tensions of the past continue, albeit in new domestic forms. Eramian provides an ethnography of everyday identity in Rwanda about a decade after the Rwandan genocide, while Gordon's article explores the dramatic period of tension between vendors and controlling shopkeepers in Challapata, Bolivia, which resulted in a new marketplace in another plaza and the formation of vendors' associations but, over time, was replaced by complacency to inequalities. All three articles are situated years after these very dynamic events occurred, yet the often subtle expressions of the present reveal more than just what has changed and what has not. For Gordon, while a disadvantaged group has obtained better access to the market, and vendors no longer engage as they did in local and national politics, “what may begin as a struggle to assert the rights and livelihood practices of a disadvantaged group can be transformed to reproduce the conditions they once fought against.” Yet Gordon reveals that “inequalities among vendors have re-emerged,” not articulated in the sense of being between the powerful and the powerless, but among and between vendors, with market competition factors like stall size, location and access to wholesale business more important than class or ethnicity, which are much less relevant in relation to market competition in Challapata.

Torres uses the post-civil war moment to contextualize the particularities of neoliberalism, inter-ethnic inequality and segregation in Guatemala City, a city that continues to experience very high levels of homicides and political violence. Living in a neighbourhood near *el Centro*, Torres and her family found themselves immersed in a neoliberal conception of the self and family, where political involvement gave way to “individual preparedness” (Goldstein 2012:14). Through conversations about and analyses of residential practices, Torres reveals how establishing a sense of control and safety through intelligence systems, security guards and barbed wire nevertheless left other concerns about insecurity, extending to suspicions directed at workers or security guards who must be given access to the home. Torres was regularly counselled how to safeguard herself and her children. She learned the sentiments of those who take insecurity into their own hands, even as they begin to wonder whether they have “consumed” security to the point of building their own jail. Through

her work, we can begin to appreciate the context of ethnicity, conflict and violence that is projected into the notion of the insecure street, resulting in a neoliberal domestication of national conflicts into the realm of embodiment and consumption.

Eramian's foray into Rwandan ethnography and the fraught ethnic boundaries that emerged after the genocide examines how "difference is produced, evaluated and interpreted in everyday social relationships." We may not be surprised to find that this identity is situational, but her choice of a context in which to examine this is remarkable. Through two thoughtful ethnographic accounts, we see situational identity play out for Charles, a professor at the National University of Rwanda. Despite the outlawing of labels, Eramian establishes that Charles is of Hutu background, but because of his education, position and relative wealth, he is marked by "stereotypes of Tutsiness in spite of his Hutu ethnic descent category." His willing participation in the obligatory *umuganda*, or "community work," solidifies his good reputation in the community in terms of reflecting the current ethos of non-elite work. But Charles' role of patron—he is a "generous donor to several young people whom he helps with school fees"—simultaneously reveals his generosity and also emphasizes the negative qualities associated with Tutsiness. Eramian teases out many of the nuances of the situation in a vivid portrayal of what it means to live identities in the context of changing national politics and sensibilities.

Finally, Karl Schmid's article combines history and ethnography to provide a broad contextualization of tourism. In the process he asks whether there is a theoretical frame that can encompass this practice when, at times, it falls outside the boundaries of neoliberalism and governmentality and speaks to relations that encapsulate capitalist but also non-capitalist processes. David Harvey's concept of accumulation by dispossession seems to accommodate the very disparate processes of loss and accumulation, including of land, belonging, reputations and representations. In so doing, Schmid's use of the long history of Luxor allows him to cover not only the present but also the formative period of tourism and the beginnings of mass tourism. His approach is to paint in the nature of these new encounters, both the everyday and the extraordinary. This puts us with the embedded scholar Vivant Denon as he buys

souvenirs in a still-smoking Napoleonic battle scene, with the Egyptian dragoman tour guides as they air their grievances against the Victorian Thomas Cook corporation in the London *Times*, and with under-employed Egyptian informal guides in Luxor, watching from across the boulevard as transnational tourism corporations choreograph the movements of package tourists, a "plastic tourism" that leaves little for the guides' own livelihoods. With historical context and ethnography it is possible to understand this loss and accumulation, through themes of land, livelihood, consent, control, heritage and belonging.

At the 2014 Canadian Anthropology Society (CASCAS) conference, several contributors had the opportunity to present these papers to Malcolm and to hear his reaction as a discussant. As usual, he provided thoughtful insights and connected the dots that link the papers and urged us all, yet again, to go after the nitty-gritty and messy aspects of the politics of power in a way that only ethnographers can do. He made a point of emphasizing his gratitude for the opportunity he had to learn from others, his colleagues and his students, many of whom went on to become new colleagues. At the same time, this was a very heartfelt acknowledgment of his passion for dialogue and discussion. Assembled here are some of the results of this cherished dialogue with Malcolm, in honour of his contribution to so many people over his long career in Canadian anthropology.

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Les ethnographies du politique : en l'honneur de Malcolm Blincow

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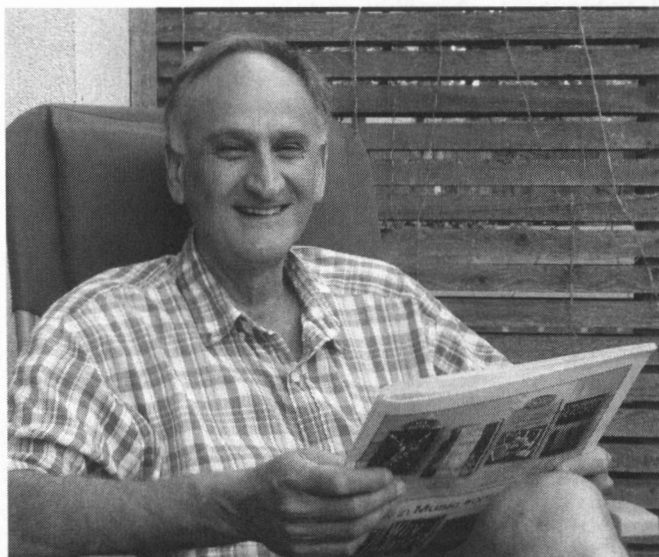


Photo par Veronica Schild.

Après avoir travaillé durant près de 40 ans au département d'anthropologie de l'Université York, le professeur Malcolm Blincow a pris sa retraite en 2012. Afin de souligner cette occasion, d'honorer sa contribution durable à la pédagogie critique, à la connaissance de haut niveau et, surtout, en raison de l'inspiration qu'il a procurée à une nouvelle génération d'anthropologues, nous avons réuni des textes de certains de ses anciens étudiants qui traduisent son intérêt prononcé, ainsi que son intervention dans le champ des études anthropologiques du pouvoir et de la politique. Stimulés par Malcolm et s'appuyant sur des recherches ethnographiques effectuées en Asie, en Afrique et en Amérique latine, ces articles représentent – singulièrement et collectivement – un engagement envers la question du politique, en divers lieux et à des échelles différentes. Cela illustre bien, ainsi qu'un collaborateur l'a souligné, la prédominance analytique et méthodologique de « l'ethnographie en profondeur et de l'économie politique pour découvrir comment de larges forces sociales se manifestent sur le plan de la pratique de tous les jours » (Eramian, ce numéro).

Malcolm était activement impliqué dans les processus complexes du département, de l'université et, de façon plus passionnée encore, au sein de l'association des professeurs de l'Université York. Par-dessus tout, il était un professeur exceptionnel. Enseigner et effectuer de la recherche, selon lui, n'étaient pas deux aspects dissociés de la connaissance – clivage que nos universités néolibérales souhaitent renforcer dans leur soif constante de subventions de recherche et de productivité reconnue. Au contraire, pour Malcolm, enseigner constituait une forme de savoir engagé, un pacte à long terme, une profession de foi, une relation durable d'apprentissage qui s'étendait bien au-delà des murs de la classe, voire de l'université. Un élément important de l'enseignement, à ses yeux, était l'écoute attentive et patiente, le dialogue intellectuel – qu'il avait avec chaque étudiant au sujet de son travail – et une quête continue pour

identifier les forces de chacun pour le pousser à faire mieux. Malcolm était un professeur légendaire et d'aucuns le considéraient comme un mentor fantastique même s'il ne se percevait pas lui-même de cette façon. Cela peut paraître ironique, parce que certaines personnes considéraient que son remarquable mentorat était sa principale contribution, mais pour Malcolm le fait d'être mentor impliquait une sorte d'enseignement dirigé par rapport auquel il prenait ses distances. Son approche pédagogique, nonobstant ses propres préoccupations, permettait à ses étudiants de bénéficier de la liberté de suivre leur propre voie. Il lisait de manière critique les écrits des étudiants de premier et de deuxième cycles. Il le faisait avec beaucoup de soin et sa marque de commerce, pour la révision de votre travail – souvent remis en retard, mais jamais sans une considération appropriée – était une copie pleinement, solidement commentée, typiquement en lettres rouges, touchant à chaque facette du texte. L'attention que Malcolm portait aux détails des textes se révélait souvent stupéfiante et le fait de recevoir ses corrections représentait un moment unique en termes d'apprentissage et de connaissance de haut niveau. Il décortiquait presque chaque paragraphe et chaque phrase d'un texte, comme la signification de son ensemble. Vous pouviez être sûr qu'il avait lu votre article consciencieusement, tout comme il vous écoutait attentivement, patiemment. Cela explique peut-être pourquoi Malcolm n'a jamais adhéré au modèle du « mentor-disciple » : ce type d'enseignement limitait beaucoup trop son désir de s'engager (même avec vos notes en bas de pages !) dans de multiples échelles, contextes, niveaux, tangentes historiques, etc. Sa démarche pédagogique ne procurait pas « d'outil magique » ; il cherchait plutôt – via son engagement soutenu – à créer un espace de manœuvre permettant aux étudiants de découvrir les lacunes que comportait leur travail.

Selon Malcolm, l'enseignement ne consiste pas à communiquer des connaissances ou à fournir des matrices de recherches. Il s'agit essentiellement d'un processus soutenu d'apprentissage et d'inculcation d'une volonté d'apprendre des textes, des professeurs, des pairs et, de manière significative, des événements historiques et politiques qui nous entourent. Non seulement l'engagement critique, l'écoute et la réflexion ont-ils été cruciaux dans l'enseignement de Malcolm, mais ces traits l'ont aussi caractérisé comme anthropologue. Toujours aux aguets, Malcolm s'intéressait aux moindres détails ; en fait, il s'y plaisait. De cette façon, il embrassait et encourageait un mode de travail de terrain et de recherche ethnographique qui examinait simultanément les micro-pratiques et les macro-pratiques de la vie quotidienne. Pour lui, une ethnographie de bon aloi nécessitait une

contextualisation et un sens de l'espace bien ancrés sur le plan historique. L'amour du contexte et de l'histoire était d'ailleurs presque contagieux en sa présence. Il offrait souvent à un étudiant ou à un collègue un aperçu de sa connaissance d'un sujet ou d'une période à travers quelques commentaires ou remarques en marge. C'était pour ses interlocuteurs une expérience comparable à celle de jeter un regard furtif dans une caverne jusqu'alors inconnue, mais vibrante d'événements et d'interprétations.

La contextualisation – comme nous le savons – est un aspect important de l'écriture de l'histoire. Ici, le sens du contexte entre en résonance avec ses racines étymologiques en créant quelque chose de nouveau ou en tissant des composantes ensemble. Les anthropologues illustrent de façon encore plus vivante la contextualisation dans leurs méthodes de recherches – comme l'observation-participante, le travail de terrain et la réflexivité. L'observation-participante est la marque de commerce de notre discipline ; or l'expression contextualisation-participante aurait été sans doute plus juste – quoique moins élégante. Le propre de l'observation-participante consiste à être immergé dans un contexte, d'agir ou de se sentir un peu comme un intervenant, de façon à mieux appréhender l'objet qu'on étudie. Dès lors, notre pratique disciplinaire nous transpose maladroitement dans de nouveaux contextes, à partir desquels nous tentons de saisir certains des fils qui tissent un moment déterminé. Parce que Malcolm y insistait tant, l'anthropologie demeurait un espace fertile pour cultiver la contextualisation, et ce, à partir de l'ethnographie immédiate jusqu'aux vastes paysages sédimentés de l'histoire.

En poussant les étudiants à s'engager et à réfléchir sur les histoires enchâssées, la contextualisation de l'espace et du temps, Malcolm leur rappelait que l'anthropologie ne tirait pas seulement son inspiration des événements qui nous entourent, mais que les concepts anthropologiques, les catégories et les théories émergent aussi des changements économique-politiques du milieu et y répondent. Ici, Malcolm insistait pour appréhender les multiples rencontres qui traversent différentes échelles et lieux de rencontres sur le terrain – à savoir des interactions concrètes, des relations avec nos « sujets » de recherche ; et ce, qu'il s'agisse de rencontres entre différents registres de connaissance en concurrence l'un avec l'autre – comme le sont le particulier et l'universel – ou de rencontres ayant lieu dans nos espaces institutionnels de travail, de recherche et d'enseignement. Pour lui, la pensée et la pratique anthropologiques étaient nées, d'une façon ou d'une autre, de rencontres effectuées dans un contexte donné. Parce

qu'elle porte son attention aux rencontres, l'anthropologie s'avérait responsable de la *politique* des relations et des interactions, en décrivant comment ces rapports donnaient lieu à des épistémologies, des pratiques, des agents ou des idéologies discordants, qui, se frottant l'un à l'autre, généraient, dans tous les cas, des tensions, des conflits, des négociations, des accommodements et de l'incorporation. C'est cette harmonisation fondamentale avec la politique imposée des rencontres – avec la manière dont elles constituent et reconstituent des rapports sociaux, produisent le savoir, reproduisent l'inégalité et assurent la domination –, que Malcolm appelle « la politique du pouvoir ». Elle place l'anthropologie dans une position avantageuse pour saisir les choses concrètes, les questions terre à terre de la politique.

Tandis qu'il s'engageait dans cette politique du pouvoir qui opère à différents degrés (comme il le déclare dans son entrevue avec Daniel Yon dans ce numéro), Malcolm ne considérait pas le pouvoir comme étant omniprésent. À un moment où les anthropologues s'intéressaient à la politique de presque n'importe quoi – en termes de lieux, de nature, d'identité, de sexualité, etc. – Malcolm se montrait très critique envers cette signification vague et envahissante du pouvoir. Elle risquait d'ignorer les rapports de pouvoir structurels et profondément historiques qui forment, souvent violemment, le terrain complexe de la modernité contemporaine. Plutôt que de faire une référence banale et superficielle aux politiques du pouvoir, Malcolm insistait sur l'identification des différents modes de pouvoir, attachant une attention particulière aux denses réseaux des acteurs politiques. En outre, il notait le rôle que jouaient différents intermédiaires et entremetteurs lesquels, étant insérés dans le contexte formel et informel de l'organisation sociale, négociaient les interstices culturels du pouvoir matériel et symbolique. C'était cet intérêt aigu pour les zones grises du pouvoir qui attirait le plus l'attention de Malcolm, le poussant à enquêter sur la politique des factions, des partis politiques, des États-nations et, finalement, sur la formation d'empire.

Le cours de premier cycle de Malcolm, « Violence et la création de la Modernité » (comme Yon le révèle dans son entrevue), est un exemple pédagogique de l'imbrication du contexte et de l'histoire : il permet d'identifier les rencontres qui définissent le projet de la Modernité. En outre, il enseigne comment la création de la Modernité « avait besoin de s'étendre constamment et de s'universaliser à travers la violence ». L'objectif consiste à savoir « comment la violence s'organise » dans un contexte institutionnel, où les principales institutions sont l'armée et ses technologies de violence. Dans cette perspective, l'article de Salman Hussain qui apparaît

dans ce numéro explore différents aspects de cette institution : l'analyse de l'auteur porte spécifiquement sur le *Manuel de terrain de la contre-insurrection de l'armée et de la marine américaines* (datant de 2006). Ce manuel s'inscrit dans un cadre de travail visant à « légaliser l'usage de la force ». Hussain montre comment l'instrumentalisation des catégories de combattants et de non-combattants « permet et justifie le recours à la violence contre ceux qui n'appartiennent pas à la catégorie appropriée ». Hussain étend son analyse historique au conflit israélo-palestinien et se penche sur l'utilisation des drones en temps de guerre. De façon plus importante, il révèle comment on procède sur le terrain, en Afghanistan – à partir de l'ingénierie culturelle du programme *Human Terrain Systems*. L'auteur démontre comment cette catégorisation a été mise en pratique, équilibrant l'autorité et la violence au moyen d'importantes sommes d'argent envoyées à des réseaux de parenté et de clientèles politiques cartographiés avec soin. Selon les dires d'un stratège militaire américain, cette récompense « nous a donné les moyens et le capital politique suffisants pour motiver des citoyens par ailleurs peu soucieux d'apporter leur aide. L'autorité sans argent nous aurait réduits à supplier ces gens de bien vouloir coopérer avec nous ». La stratégie de la contre-insurrection en Afghanistan « s'appuie encore sur l'imposition de notre volonté sur l'adversaire » (Crider 2009:15, 19-20).

Les trois articles de M. Gabriella Torres, Laura Eramian et Kathleen E. Gordon ont en commun le fait d'être des explorations ethnographiques des retombées d'événements politiques ayant façonné le contexte dans lesquels elles ont fait leur travail de terrain. Ainsi, il y a une contextualisation du passé et du présent, de même que des analyses attentives aux rencontres, souvent violentes, qui ont engendré le génocide ou les pratiques d'exclusion territoriale basées sur des actions discriminatoires fondées sur la classe sociale. Torres a travaillé dans la capitale du Guatemala après des décennies de dictature et de guerre civile. La chercheuse nous situe dans un quartier du centre de la ville, où la violence et les tensions interethniques du passé se manifestent encore – bien que sous des formes domestiques nouvelles. Eramian propose une ethnographie de l'identité quotidienne au Rwanda, dix ans après le génocide, tandis que l'article de Gordon explore les accommodements qui se sont établis entre des vendeurs ambulants et des commerçants intransigeants suite à une période de tensions à Challapata, en Bolivie. Il en a résulté l'implantation d'une nouvelle place du marché et la formation d'un syndicat des vendeurs. Les trois articles en question se situent à une période postérieure aux bouleversements auxquels ils se réfèrent. Assurément, les expressions

contemporaines en disent plus long que le seul constat de ce qui a changé ou pas. Selon Gordon, quand un groupe défavorisé a obtenu un meilleur accès au marché, les vendeurs ne s'engagent plus comme ils le faisaient dans la politique locale ou nationale. Cependant, « ce qui peut commencer comme une lutte pour revendiquer ses droits et son mode d'existence peut se transformer de manière à reproduire les conditions contre lesquelles un groupe défavorisé se battait auparavant ». De plus, Gordon révèle que « les inégalités parmi les vendeurs ont resurgi sous des formes nouvelles », non plus articulées autour de l'opposition entre les gens qui ont du pouvoir et ceux qui n'en ont pas, mais au sein même du groupe des vendeurs ambulants, qui sont aux prises avec la concurrence, la taille de leur éventaire, sa localisation et l'accès au commerce de gros. Ces facteurs s'avèrent désormais plus importants que la classe sociale ou l'ethnicité, lesquelles sont beaucoup moins pertinentes aujourd'hui, par rapport à la concurrence sur le marché à Challapata.

Torres se sert de la période de l'après-guerre civile pour contextualiser les particularités du néolibéralisme, des inégalités interethniques et de la ségrégation dans la ville de Guatemala, qui connaît encore de très hauts taux d'homicides et de violence politique. Habitant dans un quartier situé près du centre-ville, Torres et ses proches ont été immergés dans une conception néolibérale du soi et de la famille, où l'implication politique pavait la voie à « l'état de préparation individuel » (Goldstein 2012:14). À travers des conversations et des analyses de pratiques résidentielles, Torres révèle comment en établissant un sens du contrôle et de la sécurité par le biais de systèmes de surveillance, de gardiens de sécurité et de fils barbelés, ces pratiques créaient d'autres problèmes d'insécurité –, notamment des soupçons que l'on pouvait avoir concernant les travailleurs ou les gardiens de sécurité qui devaient avoir accès au chez-soi. Cela dit, on conseillait souvent à Torres de s'occuper de sa protection personnelle et de celle de ses enfants. Elle a pris conscience des sentiments de ceux qui combattaient eux-mêmes l'insécurité, notamment lorsqu'ils commençaient à se demander s'ils n'avaient pas « consommé la sécurité » au point de construire leur propre prison. À travers le travail de Torres, on apprécie comment le contexte de l'ethnicité, du conflit et de la violence est projeté dans la notion de « dangers de la rue » –, ce qui a pour effet de produire une domestication néolibérale des conflits nationaux dans le domaine de l'incorporation et de la consommation.

Eramian procède à une incursion dans l'ethnographie rwandaise et la lourdeur des frontières interethniques qui ont émergé après le génocide. La chercheuse

examine comment « la distinction se produit et de quelle façon on l'évalue et l'interprète à travers des relations sociales quotidiennes ». Nous ne serons pas surpris d'apprendre que cette identité est d'ordre situationnel, même si Eramian choisit un contexte remarquable pour l'examiner. À travers deux comptes rendus ethnographiques approfondis, nous voyons comment l'identité situationnelle se dessine en considérant le cas de Charles, un professeur à l'Université nationale du Rwanda. Bien que les identités ethniques soient désormais hors-la-loi, Eramian établit que Charles est d'origine hutue, mais qu'en raison de son éducation, de sa position sociale et de son aisance matérielle relative, on le considère comme un « stéréotype de Tutsi malgré le fait qu'il est descendant de l'ethnie hutue ». Sa participation volontaire à l'obligatoire *umuganda*, ou « travail communautaire », renforce sa réputation au sein de la communauté en des termes qui reflètent l'actuel ethos du travail non élitiste. Toutefois, lorsque l'on considère son rôle de patron – puisque Charles est « un généreux donateur qui aide de jeunes gens à s'acquitter de leurs droits de scolarité » –, il met simultanément en lumière sa générosité et des défauts associés à l'ethnie tutsie. En somme, Eramian traduit bien de nombreuses nuances se rattachant à la situation lorsqu'elle trace un portrait vivant de la manifestation des identités, dans un contexte de politiques nationales en mutations et de sensibilités versatiles.

Finalement, l'article de Karl Schmid combine l'ethnographie et l'histoire afin d'apporter une vaste contextualisation du tourisme. À travers ce processus, il se demande s'il y a un cadre théorique qui peut englober cette pratique lorsque, par moments, elle se glisse à l'extérieur des frontières du néolibéralisme, de la gouvernance, et implique des relations qui se rapportent à des processus capitalistes ainsi qu'à des mécanismes non capitalistes. Le concept de David Harvey, « l'accumulation par dépossession », semble convenir aux processus disparates de perte et d'accumulation, qu'il s'agisse de la terre, de l'appartenance, des réputations et des représentations. L'utilisation que fait Schmid de la longue histoire de Luxor ne lui permet pas seulement de traiter du présent, mais aussi de se pencher sur la période formative du tourisme et sur les débuts du tourisme de masse. Sa démarche consiste à dépeindre la nature de ces nouvelles rencontres, qu'elles soient ordinaires ou extraordinaires. Cela nous amène à considérer le cas du savant Vivant Denon, alors qu'il achète des souvenirs à un interlocuteur sur une scène de bataille napoléonienne encore fumante, en participant aux visites guidées de l'interprète égyptien. Ultérieurement, les interprètes d'Égypte feront connaître leurs doléances envers la corporation

victorienne Thomas Cook dans le *London Times*. Cette entreprise engage des guides égyptiens informels et sous-employés, lesquels observent de l'autre côté du boulevard tandis que les corporations du tourisme transnational chorégraphient les mouvements des groupes de touristes –, « un tourisme de plastique » qui laisse peu de choses aux travailleurs pour leur permettre d'en vivre. En tenant compte du contexte historique et de l'ethnographie, il est possible de comprendre le sens de la perte et de l'accumulation, à travers les thèmes de la terre, du gagne-pain, du consentement, du contrôle, du patrimoine et de l'appartenance.

À la conférence organisée par CASCA en 2014, différents participants ont eu l'occasion de présenter ces textes à Malcolm et de connaître sa réaction à titre de commentateur. Comme d'habitude, il a fait des suggestions pénétrantes et a mis en relation les dénominateurs communs des textes précités. En outre, il nous a tous pressés, derechef, de considérer les choses concrètes et chaotiques de la politique du pouvoir, d'une façon dont seuls les ethnologues ont le secret. Le professeur s'est fait un point d'honneur de souligner la gratitude qu'il éprouvait en vertu de la chance qu'il avait eue d'apprendre des choses que ses collègues et ses étudiants lui avaient révélées. Nombre d'entre eux sont d'ailleurs devenus de nouveaux collègues. Cette occasion exceptionnelle a permis à Malcolm d'exprimer sa sincère

reconnaissance à ces personnes pour le dialogue et la discussion qu'il a pu établir avec elles. Ce numéro présente certains résultats concrets de notre conversation fort appréciée avec Malcolm, ainsi qu'un hommage pour l'aide exceptionnelle qu'il a apportée à tant de gens, durant sa longue carrière au sein de l'anthropologie canadienne.

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Ethnic Boundaries in Contemporary Rwanda: Fixity, Flexibility and Their Limits

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Abstract: This article investigates how ethnic boundaries operate at the level of everyday practice in post-genocide Rwanda. Using situational analysis of two ethnographic accounts, I argue that Rwandans experience ethnicity as both descent-based (fixed) and social-relational (flexible), the convergence of which finds expression in everyday forms of moral agency. An account of the historical emergence of Tutsi and Hutu ethnic stereotypes develops the idea that, in everyday life, there is no single criterion that Rwandans can use to conclusively resolve how they belong ethnically. Thus, the question of how and when ethnicity matters in the post-genocide period remains uncomfortably open.

Keywords: Rwanda, ethnicity, genocide, state formation, moral agency, urban Africans

Résumé : Cet article examine la façon dont les frontières ethniques opèrent au niveau de la pratique quotidienne dans le Rwanda de l'après-génocide. En utilisant l'analyse situationnelle de deux enquêtes ethnographiques, je soutiens que les Rwandais vivent l'expérience ethnique à la fois comme étant fixée par la descendance et comme s'appuyant sur une relation sociale souple. Cette convergence s'exprime dans les formes quotidiennes de l'action morale. Une étude au sujet de l'émergence historique des stéréotypes ethniques des Hutus et des Tutsis révèle que, dans la vie quotidienne, il n'y a pas de critère unique que les Rwandais peuvent utiliser, de manière concluante, pour savoir quelle est leur appartenance respective. À l'heure actuelle, la question consistant à savoir comment et quand l'ethnicité importe, durant la période de l'après-génocide, demeure malheureusement irrésolue.

Mots-clés : Rwanda, ethnicité, génocide, formation de l'État, action morale, citoyens africains

Introduction

In conceptualizing my contribution to this collection in honour of Malcolm Blincoe, I aim to capture his commitment to both political economy and rich ethnography to elucidate how broad social forces play out at the level of everyday practice. Such an approach is especially germane for grasping how ethnic difference is produced, evaluated and interpreted in everyday social relationships in contemporary Rwanda. There, the politics of ethnicity have given rise not only to the devastating 1994 genocide but also to the Rwandan Patriotic Front (RPF)-led government project of forging a “New Rwanda”, which aims to overcome ethnic difference and reduce it to a divisive relic of the colonial past.

Although ethnic politics took on an extraordinary tenor in the 1994 genocide, debates on Rwandan ethnicity parallel those in the wider Africanist literature and beyond. First, in Rwanda and elsewhere, scholars have focused on the conditions under which ethnic differences come to matter politically, particularly the coincidence of ethnic boundary production with decolonization (A. Cohen 1974; Lemarchand 1970; C. Newbury 1988; Williams 1989; Wilmsen and McAllister 1996). Second, two main configurations of ethnic boundaries populate the ethnographic record on Rwanda and constitute an opposition that mirrors larger debates on the nature of ethnic difference (Barth 1969; R. Cohen 1978; Nagata 1974). On the one hand, there is an absolute, “either-or” perspective and, on the other, a fluid, situational approach. In the case of Rwanda, the rigid, caste-like understanding of ethnicity based on patrilineal descent found its classic expression in Jacques Maquet's (1961) “premise of inequality” between Hutu and Tutsi. Against this reductive, descent-based view of ethnicity grew a set of counterperspectives that saw Tutsi and Hutu as social-relational, flexible categories that overlap with differences like region, class, clan and gender (e.g., de Lame 1996; Gravel 1968; Lemarchand 1970; C. Newbury 1988; D. Newbury 1980). However, immediately after

the genocide, the either-or view of ethnicity was again central because of the impulse to account for the role of the ethnic binary in the violence. Scholars traced the historical production of the Tutsi–Hutu opposition and emphasized the relatively recent crystallization of political factions around an either-or view of ethnicity (e.g., Chrétien 2003; des Forges 1995; Mamdani 2001; Prunier 1995) to counter the “ancient tribal hatreds” narrative promoted by the international media during the genocide. However, Lee Ann Fujii (2009:104) argues that ethnicity was more than a rigid binary, even in 1994, as the killing of Hutu as well as Tutsi meant it was not always clear who the main targets were.

As the initial imperative to explain the genocide receded, scholars, especially ethnographers, began to recover the situational view of Rwandese ethnicity. Many emphasize how ethnic boundaries overlap with north–south regional divides, status and class distinctions, and citizenship categories to destabilize RPF claims to having excised ethnicity from the social order by outlawing the labels Tutsi and Hutu (Buckley-Zistel 2006; Burnet 2012; Doughty 2011; Fujii 2009; Jefremovas 1997; McLean Hilker 2009; Thomson 2013). Still, scholars do not deny the ongoing significance of “inherited” ethnicity, as they also highlight the constraints posed by one’s ethnic heritage in the post-genocide moment. Inherited ethnicity governs who can openly mourn their dead at genocide commemorations and how one stands in relation to categories like victim, survivor and perpetrator (Burnet 2012; Doughty 2011; Vidal 2004), which profoundly shape how people participate and belong in their social worlds. Thus, even at historical junctures where either rigid or mutable perspectives on ethnicity dominate the literature or Rwandan politics, the other is never ruled out completely.

In this article I do not ask whether a rigid or situational view of ethnicity has greater explanatory power in the Rwandan context. Both configurations exist and matter; anthropologically speaking, the question is how they intersect in the everyday lives of Rwandans. This article contributes a perspective on the practical tensions raised by this convergence of absolute and situational ethnicity. I show how their confluence finds expression in everyday practices of moral agency in the “post-conflict” moment. By *moral* agency, I mean deliberate acts based on strong evaluations of the worth of one’s desires and possible actions (Taylor 1985), evaluations that are made against standards of moral regulation—that is, “proper forms of expression,” both linguistic and non-linguistic, that constitute “moral repertoires” out of which social identities are produced (Corrigan 1981:319). Those social identities, however, are never unproblematic,

since competing standards of moral regulation in Rwanda shape everyday practices of self-presentation as people grapple with the question: “What kind of person should I be?” I argue that it is not just rigid, either-or ethnicity that limits the identities people can felicitously perform. Since moral qualities, personal capacities and behavioural traits are ethnically marked, they can also cast doubt on “inherited” Hutu or Tutsi ethnicity. But, simultaneously, the relationship between rigid descent categories and victim–perpetrator categories continues to place profound constraints on how people know themselves and others.

This article is based on one year of ethnographic fieldwork from 2008 to 2009 in the Rwandan university town of Butare. The findings are part of my larger doctoral project on personhood, ethnicity and everyday social relationships in post-genocide Rwanda. I worked with educated (but not necessarily high-income) town residents, including university professors and students, small business owners, NGO workers, clergy members and workers in low-skill jobs (who are not necessarily uneducated)—like wait staff, groundskeepers and motel cleaners—as well as the unemployed. All conversations and interviews were conducted in French. Since these Butare residents are not representative of the rural majority of Rwandans, the question is, why investigate the routine operations of ethnicity among privileged, urban people? The exceptional position of the educated urban dweller renders the tensions between the absolute and situational dimensions of ethnicity especially discernible. Since ethnic categories are marked by status and wealth differentials (des Forges 1995; Fujii 2009; Lemarchand 1970; C. Newbury 1988) and vice versa, the mapping of stereotypes onto social organization places the educated urban dweller in a position marked by stereotypical forms of “Tutsi” privilege, which relatively few Rwandans can claim. However, in light of the history of violence, wealth and education carry social dangers, ones that urban dwellers aim to mitigate through situational performances that may or may not correspond to their “inherited” ethnicity. Therefore, I suggest that this atypical case study provides particular analytical clarity for grasping how both rigid and mutable ethnic boundaries operate in small-town Rwanda at the level of everyday practice.

The argument unfolds in four parts. First, I discuss how the current political context in Rwanda shapes and constrains the methods choices of the ethnographer interested in ethnicity. Second, I provide ethnographic accounts of two social situations from my fieldwork. Following the Manchester School tradition of the extended case method (Burawoy 2009; Evens and Handelman

2006; Werbner 1984), both situations focus on a university professor whom I call Charles. The third section describes the historical political-economic production of stereotypical qualities and capacities of “Hutuness” and “Tutsiness,”¹ which provide the interpretive lenses for the final section, which analyzes the two situations in light of those long-standing stereotypes and their vicissitudes. It draws out the limits that mutable and immutable ethnic boundaries impose on each other and the moments in which the social actor cannot easily escape the salience of either inherited or situational ethnicity.

Researching Ethnicity in Rwanda

Contemporary politics raise several perils for those investigating the practical workings of ethnicity in Rwanda. The most obvious challenge is the state moratorium on using ethnic labels in public, a post-genocide move that is directed to producing a de-ethnicized, pan-Rwandan form of national belonging. Violation of this can result in accusations of “divisionism” or “genocide ideology” (Pottier 2002). Even as rigid, descent-based ethnic boundaries underpin the RPF-led government’s highly political account of the “genocide of the Tutsi,” RPF state formation strategies paradoxically rest squarely on the claim that ethnicity is an illusory boundary that the former colonizer used to divide Rwandans. In this narrative—one now heavily critiqued by scholars (e.g., Pottier 2002)—Tutsi and Hutu were relatively innocuous status or occupational distinctions, ones that were changeable and lacked political salience. Indeed, to suggest, as I do in this article, that one’s ethnicity can shift depending on social-relational and situational factors could be read as treading dangerously close to the government’s idyllic vision of pre-colonial history and ethnicity or attesting to the truth of its model-making or “magical thinking” (Ingelaere 2012). My aim here is not to reproduce a politically convenient account of the pre-colonial past but, rather, to draw out the complexities of how broad social forces of political economy play out in the routine workings of ethnic boundary production. Indeed, as I discuss below, drawing from my fieldwork, Rwandans experience ethnicity both as a rigid boundary *and* as a relation entangled with other social distinctions in popular stereotypes. Hence, the absolute and changeable dimensions of ethnicity are produced and negotiated in everyday social interaction (see Barth 1969).

The fraught political context of today’s Rwanda, in which ethnic labels can only be spoken to denounce them, produces strict constraints on the methods that an ethnographer can use to “get at” the practical workings of ethnicity. No one can ask Rwandans whether

someone was “acting like a Hutu” and expect a serious answer (the only politically expedient response is to claim that one no longer thinks that way). As a result, when investigating the practical operations of Tutsi and Hutu categories, the ethnographer is primarily limited to participant observation and interpretive approaches, ones that pay attention to people’s use of social categories, the limits to what can be performed and the uncertainties of how those performances can and should be interpreted. The central difficulty in researching the politics of ethnicity in post-genocide Rwanda is that one can never be certain whether Rwandans intend or interpret any given interaction, depiction or expression to have an “ethnic” meaning. And yet there are compelling reasons for pursuing this line of investigation, since researchers have shown that Rwandese ethnicity has not simply disappeared with the outlawing of Tutsi and Hutu labels by the government (e.g., Buckley-Zistel 2006; Burnet 2009; McLean Hilker 2009; Straus and Waldorf 2011; Thomson 2013).

Social Situation I: Those Who Work Hard at *Umuganda*

Umuganda (“contribution” in Kinyarwanda) is community work that takes place nationwide in Rwanda on the last Saturday of each month. It was first introduced under President Juvénal Habyarimana’s populist rural development campaign of the 1970s but was quickly co-opted by the elite for personal gain. Wealthier people stopped participating and corruption in high government ranks meant that work groups were ordered to till the personal fields of state officials (Longman 2010:123). After the 1994 genocide, *umuganda* was revived as a strategy of unity and reconciliation: working together to rebuild the country. It is, in principle, compulsory for all adult citizens and each person has a card that must be signed by the neighbourhood head (*chef du quartier*) to mark her or his attendance. However, many, if not most, affluent town residents choose to pay a fine instead of participating; so, depending on the neighbourhood, numbers can be quite thin. *Umuganda* usually consists of cultivating fields, maintaining public property, planting trees, picking up litter or building houses for genocide survivors. Fortunately, on the occasions when I attended, the activity was tree planting, a form of work for which even I had the necessary skills.

I attended *umuganda* with Charles (a pseudonym),² a professor at the National University of Rwanda (NUR) in Butare. According to patrilineal descent rules, Charles is Hutu, a fact he never revealed to me directly. I gleaned it from a February 2009 conversation in which Charles complained that people think he and a friend (someone

who had previously divulged his Hutu ethnicity to me) do favours for each other because of shared ethnicity. Charles regularly attended umuganda, but he sometimes stated somewhat sheepishly that when the assigned work was to build houses, he would end up just standing around because of his lack of experience with construction. Charles grew up on a rural hill in neighbouring Gikongoro province, but he is a long-time resident of the town. He first arrived there as a secondary school student to attend the prestigious *Groupe Scolaire* established during the colonial period. He later attended the NUR as an undergraduate student; many of the professors he remembers from that time eventually became propagandists for the genocide or, sadly, its victims. During the civil war (1990–94), Charles married a Butare woman whom he met while studying at the university. Like most Hutu men, he says little about where he was and what he was doing during the civil war and genocide. During the eleven years I have known Charles, he has spoken only in passing of where he was during the war, and when he did so, he spoke only vaguely about how that was a time when he had “real problems.” Shortly after I first met him, in 2004, he told me that his (Hutu) father was killed in the genocide, but he has not spoken of it to me since. To my knowledge, Charles was never imprisoned or indicted as a genocide suspect, so he was spared the ordeal of standing trial at *gacaca* (local-level genocide courts). Unlike many NUR professors who reside in the capital, Kigali, and commute to the campus, Charles and his family reside in Butare. On this basis, Charles often staked a claim to being a “simple” person who is not seduced by the lure of the capital. However, his frequent trips to Kigali for meetings and conferences were the subject of scrutiny and speculation among the neighbours: Who invited him to the capital so often, and what did he do there that let him buy a house and a car and fund both his own children’s and other children’s education?

During umuganda we worked in Charles’ neighbourhood of Ngoma, a mixed-income residential area. There, it is not unusual for houses like Charles’, ones with indoor plumbing and electricity, to be built in close proximity to others’ simple, sometimes even makeshift homes. On the morning of umuganda, the *chef du quartier*, a young, energetic acquaintance of Charles’ with a light-hearted demeanour, was waiting on the street to organize participants. The street, the main artery through Ngoma, was rather quiet compared to its usual bustle. Since businesses are required to close on the mornings of umuganda, there were not many people on the road making their way into town. Surveying our calm surroundings, the chef expressed concern that few people would come

to help. He wondered how, with so few hands, we would be able to plant all of the saplings that were to be dropped off. He then proceeded to make a joke about my small frame, which suggested that he was not particularly confident that I would be much help in this regard.

We conversed casually for about 30 minutes while waiting for the trees to be delivered, during which time a handful more people arrived. Some were wealthier residents dressed like Charles in the Adidas or Reebok tracksuits often worn on weekends by the affluent, but they paired them with the heavy rubber boots favoured by rural agriculturalists. Others were low-income neighbours dressed in eclectic combinations of second-hand clothing, who could be counted on to bring the wheelbarrows, shovels and other tools required for umuganda.

Once the trees were delivered, we set out in a group of only eight to begin. At the start, all participants were men, all of whom appeared between 40 and 65 years of age. One woman, wearing jeans and a polo-style shirt, joined us about a half hour later. She greeted me with a joking “Bonjour, monsieur!” to signal the oddity of a young white woman attending umuganda. Only one man, a low-income neighbour, had brought his wheelbarrow along to cart trees around. Since we could not all follow him around if we wanted to distribute the trees evenly and efficiently throughout the neighbourhood, Charles volunteered to go back to his house to retrieve the wheelbarrow that normally is used only by his gardener and by his domestic worker for hauling firewood. He appeared pleased to be contributing agricultural tools not usually supplied by those who do not make their living using them. With his wheelbarrow, we were able to split into two groups and make our way around the neighbourhood. As we moved along our way, good-natured banter characterized exchanges between participants. They teased each other about their planting techniques and their level of know-how when it came to agricultural tasks. Other residents would occasionally arrive to join the work, but most passers-by, upon seeing the work group, quickened their pace. The workers shouted to those who passed and asked them where they were going and why they had not come to share in umuganda. To some extent, their shouts were in jest, but they also demonstrate real resentment and criticism of those who buy their way out of shared work—agricultural work that has the markings of the rural peasant majority of the country. Charles has a good reputation in the neighbourhood in large part because of his willingness to join in shared work with his lower-income neighbours instead of paying the fine. The *chef du quartier* appreciates that someone of his status works

hard at umuganda, and he is quick to do Charles small favours, like witnessing his passport application, a request that could easily be put off for weeks by a chef who is unhappy with the applicant. While the moral agency of participating in shared physical work is a crucial way for wealthy town residents to maintain good reputations and relationships with neighbours, I could not help but notice that the work group nonetheless split up along lines of those who work in modern, urban sectors and the urban poor who make their living in ways not unlike the work of umuganda.

Social Situation II: Being a Good Patron, Being a Good Client

Charles is known in Butare as a discriminating but generous donor to several young people whom he helps with school fees. As a Hutu male, he is careful to cultivate a reputation for giving to both *rescapés* (a term that, in state usage, controversially excludes Hutu and denotes only Tutsi survivors) and (primarily Hutu) youth subject to the economic hardships of having their fathers imprisoned for genocide crimes. He explained that he does so in part because he has genuine sympathy for youth in both situations, but he also acknowledges that he must take care not to be perceived to favour fellow Hutu. Patron–client exchange—a relationship whose rigidity and ubiquity in Rwanda colonial anthropologists arguably exaggerated (C. Newbury 1988; Vidal 1969)—is nonetheless still thriving today in Butare. However, unlike the relatively stable relations of exchange that scholars say characterized patron–client bonds in southern Rwanda in pre-colonial and colonial times (Maquet 1961), today they are less enduring relationships than they once might have been. I say “might” because clientship in Rwanda has varied substantially by region and historical period (de Lame 1996; C. Newbury 1988). Thus, even as anthropologists have mistakenly fetishized cattle clientship (Vidal 1969), patron–client exchange, in its diverse incarnations, has a long history as a crucial institution in Rwanda. In Butare today, clientship usually operates around requests for school fees or for personal connections to be activated to secure employment. It typically ends when a patron has decided that she or he has given enough for the client to *se débrouiller*, or to get by on his or her own. Butare residents both celebrate today’s short-term nature of patronage as the end of “premodern” relations of dependency and lament it for the decline in durable networks that people can depend on in times of need. In the following situation, a neighbourhood woman came to receive money from Charles to help pay her children’s school fees.

Charles had told me about this woman, who lives up the road from him, a mother of seven who is now head of her household because her husband is in prison for alleged genocide crimes. He had explained to me that, even as he knows it is important to have a reputation for generosity, he has grown reluctant to pay students’ tuition directly because of the growing financial burden each time his clients return for another instalment. Charles had thus agreed to loan his neighbour money to purchase a sewing machine so that she could generate income by making and altering clothing and pay her children’s tuition fees herself.

I happened to be in Charles’ living room when the woman arrived to collect her promised loan. As was his evening habit, Charles was sitting on his sofa, drinking Mützig, the more expensive of the two local commercial beers, and watching the news on television. The woman was received at the front door, through which honoured guests arrive, not the rear kitchen door, where only family members, the hired help or familiar guests enter. Charles’ wife, who normally comes out to greet guests, even if she is assisting the domestic worker with food preparation, was nowhere to be found on the occasion of this visit, which indicates that she knew it was not primarily a social call. Nonetheless, Charles offered the neighbour some banana wine. To offer an alcoholic drink is a show of equality between guest and host, because non-alcoholic drinks are offered only to those of lower status, usually women and children. Since this woman was the head of her household, it was appropriate for Charles to offer her an alcoholic drink and acknowledge that dimension of equality between them.

They watched television and chatted about her sewing business for a while, joking about how many pairs of pants a person actually needs versus how many he would like to have. For the duration of the conversation, however, Charles set the parameters. He posed the questions while she, in her subordinate client status, spoke when he addressed her. Still, Charles tempered the hierarchy of their relationship with shows of equality, like the friendly chatter and sharing of drinks, so that the recipient did not feel unduly subordinated. Even though both parties knew the reason for the visit, each of them acted as though it was a friendly invitation to drink until Charles decided it was time for the woman to depart. He went into his bedroom and returned with an envelope of money. Upon receiving it, she left abruptly because she knew that this was her cue. Both donor and recipient in this patron–client exchange made use of the ambiguous boundaries between friendship and clientship (Pitt-Rivers 1961) to foreground the friendly qualities of the encounter: the donor to reduce

the subordination felt by the recipient and the recipient to limit the extent to which the donor perceived the relationship as purely instrumental. It is important in Butare that a patron not feel like “a cow that just keeps on giving [milk],” as Charles put it several times.

Moral Regulation and Competing Values: Hutuness and Tutsiness

To understand how these two social situations illustrate how mutable and rigid ethnicity come up against each other, it is necessary to understand how and why competing values structured around ethnic stereotypes emerged. A brief foray into the politics of post-colonial state formation and cultural revolution (Corrigan and Sayer 1985) in Rwanda provides the basis for these insights. While the politicization of ethnicity and its manifestations were by no means uniform throughout Rwanda during the late colonial period, it was in the late 1950s that claims to legitimate rule by the traditional Tutsi elite and the Hutu counter-elite of Butare and the nearby colonial strongholds of Kivu and Nyanza came to be articulated explicitly in terms of ethnic difference (Lemarchand 1970:146). At this time, political parties for the pre-independence elections crystallized along lines of inherited ethnicity. At the heart of these state formation struggles were two competing visions of what modernity and equality mean and how they should be enacted in the post-colonial period. One vision was promoted by the conservative, pro-Tutsi monarchist party, the Union Nationale Rwandaise (UNAR), which was supported by the United Nations and the old guard of the Catholic Church, who believed in Tutsi superiority. The second was put forth by the principal Hutu party, the Parti du Mouvement de l'Émancipation Hutu (PARMEHUTU), supported by the Belgian colonial administration and the more progressive wing of the Catholic missionary presence in Rwanda, concerned with inequality and social justice (Linden 1977).

UNAR and PARMEHUTU appealed to the population using parallel, but diametrically opposed, visions of what a modern, independent Rwanda should look like. The key questions behind this struggle were: Who is modern, what does equality mean, and how should it be enacted? The UNAR vision of independent nationhood preserved the status quo of the colonial ethnic hierarchy, but it was couched in terms of equality. It was based on the notion that decolonization requires an educated elite to identify and seek solutions to emergent political, economic and administrative challenges. In this vision of post-colonial nationhood, to be modern was to earn status through achieved rather than ascribed attributes, the latter being pejoratively associated with pre-colonial

and colonial social hierarchies. Equality was based not on shared rights, opportunities or material conditions but, rather, on a shared Banyarwanda (pan-Rwandan) identity (Lemarchand 1970:161). The Tutsi elite of the UNAR claimed the personal attributes and cultural capital required to instill national identity and a sense of unity in the population. UNAR ideology was thus a claim to the legitimacy of established instruments of Tutsi rule—education and ascribed superior status—thinly veiled by an ideology of nationalism (Linden 1977:260).

By contrast, the Hutu counter-elite's vision of modernity and equality aimed to redress the colonial oppression of the Hutu majority. In PARMEHUTU ideology, an equation quickly emerged in which Hutu = people = poor = majority, in which the “feudals” (Tutsi) were not fit to govern an independent Rwanda because they were colonial collaborators “detached from the people” (Ntakirutimana and Semujanga 2010:49). Modern nationhood, in the PARMEHUTU vision, meant righting the wrongs of the history of oppression wrought by the long-standing colonial presumption of Tutsi supremacy (Linden 1977:235). Equality consisted in transforming the material conditions of the Hutu population by providing equal access to the benefits of modernity, including education, from which they had long been all but excluded (250).

The state formation struggles of the mid- to late 1950s remained largely confined to the Tutsi and Hutu elite of southern and central Rwanda. However, when PARMEHUTU consolidated its support base and won the first national elections by a landslide in 1959, their victory signalled a cultural revolution (Corrigan and Sayer 1985) in both official and popular valuations and interpretations of ethnic difference. Independence brought about a radical transformation in meanings of equality, from the long taken-for-granted status quo of “Tutsi” rule to a “Hutu” vision of equality as social justice, shared material conditions and a voice for the general population (C. Newbury 1988:188). Ethnic difference was now the premise on which the new Hutu leadership proclaimed Tutsi illegitimacy and, by extension, Hutu legitimacy. Hutuness, long the mark of the subjugated, became valorized through PARMEHUTU claims to legitimate rule as the rightful inhabitants of Rwanda long exploited by a Tutsi elite (195–196).³

It bears emphasizing that this cultural revolution did not seek to make Hutuness connote the same wealth, status, educational attainment or moral qualities associated with Tutsiness. Rather, it aimed for a revaluation of the stereotypical qualities of Hutuness in which they took on new esteem in light of the PARMEHUTU vision

of modern nationhood (Linden 1977:254). Indeed, PARMEHUTU's claim to political legitimacy rested on valorizing the "humble folk" (Chrétien 2003:302) and making Hutuness stand for qualities worth upholding to counter decades of disparagement by both colonial and Rwandan elites (although they did not end it completely since, as Thomson [2010:22–23] shows, today's RPF-dominated government is known to similarly denigrate "peasants"). Hence, the PARMEHUTU revaluation of Hutu qualities shifted the norms governing moral regulation and the question of what kind of agent one should aim to be. Nonetheless, the new celebration of Hutuness by no means erased the value of "Tutsi" qualities. For example, in 1957 Grégoire Kayibanda, the future leader of PARMEHUTU, formed the Hutu Social Movement, through which he aimed to improve Hutu access to formal education (C. Newbury 1988:192) and, by extension, historically Tutsi forms of privilege. Hence, each set of stereotypes took on new ambiguities with the emergent positive connotations of Hutuness and the denouncement of stereotypical Tutsiness, which produced competing standards for desirable conduct and social identities. Thus, even though the current "Government of National Unity" has outlawed ethnic labels in public discourse, class, occupational, educational and political distinctions are nonetheless still entangled with the ethnic stereotypes and their competing values because of the political work that went into forging these linkages during the period of independence-era state formation.

The question, then, is what those stereotypes look like, where their ambiguities lie and how they matter in everyday life. Hutuness, associated with the peasantry and the subordinate position in patron–client exchange, has certain positive moral qualities and capacities, especially stamina for the hard work and physical labour of agriculture with which the Hutu have long been stereotypically associated. Likewise, humility, honesty and good-naturedness are points of pride (Semujanga 2003:114–117; des Forges 1995:44). But also embedded in Hutuness are less praiseworthy traits that arise from the stereotypically subordinate position of the Hutu in the old system of *ubuhake*⁴ cattle clientship. These qualities include poverty, a desire for positions of servitude and childlike dependency (Lemarchand 1970:43). In other words, there are two main "Hutu" capacities or ways of getting things done: either through hard work and physical labour (an admirable trait) or by appealing to a potential patron for assistance and entering into a relationship of dependency (a less respected trait). Today the valorization of physical labour helps to explain the moral importance that Charles attributes to attendance at umuganda.

Tutsiness connotes a contrasting locus of traits because of the colonial stereotyping of the Tutsi as superior political leaders and patrons to dependent clients. Catharine Newbury (1988:12) notes that *Tutsi*, as used in everyday talk, often referred not to descent but to a social condition of wealth. Especially in the pre-colonial and colonial seats of power, like Nyanza and Butare, the term *Tutsi* was used by the powerful in a self-definition of their own eliteness (12), a distinction that encompassed not only class but also power and cultural features (D. Newbury 1998:85). The largely positive characteristics associated with Tutsiness are independence of thought and action and the ability to look after oneself, instead of seeking the assistance or protection of a patron.⁵ A person who demonstrates self-sufficiency is appreciated in Butare because, it goes without saying, everyone has had problems since 1994, and so residents speak highly of those who get by without burdening others. However, these same traits can be turned on their heads: the self-sufficient person is also thought to be un-neighbourly and to lack a sense of sociality when it comes to assisting others. Furthermore, it is said that a stereotypical Tutsi is lazy and cannot work hard but instead gains wealth on the backs of the Hutu. Cleverness, trickery and wiliness are also stereotypical Tutsi qualities (Lemarchand 1995:9; C. Newbury 1998:9) because it is said that the Tutsi tricked the Hutu into exploitative relations of servitude. "Tutsi" capacities or ways of getting things done are either getting by on one's own (an admirable trait) or tricking others and putting them in positions of servitude and dependency (contemptible traits). Hence, there are moral tensions that emerge when one takes on a patron role as Charles did in the second social situation above. What is important about these popular stereotypes is that, in practice, one's ethnic descent category can have little or nothing to do with the ethnic identification one might situationally be interpreted to have. Indeed, region of origin, occupation, wealth, marriage ties, stereotypical physical attributes and moral qualities are all criteria that Rwandans know how to use to evaluate ethnic affiliations (C. Newbury 1988).

What was clear during my fieldwork—and in the findings of numerous other scholars working in Rwanda today—is that these Tutsi and Hutu stereotypes are alive and well. Even though the RPF has outlawed ethnic labels, people continue to use ethnic categories as interpretive frameworks. Rwandans are well versed in the cultural stereotypes of Tutsi having a fondness for wealth and cattle, and they categorize people who are high status as Tutsi (Fujii 2009:114). Susanne Buckley-Zistel (2006:141) similarly reports that wealthy people

are still occasionally referred to as Tutsi regardless of their ethnic descent categories and that the expression, “I am not your Hutu,” is deployed if the speaker perceives that someone is trying to exploit her. Further, Lyndsay McLean Hilker (2009:89) found that urban youth in Kigali use Tutsi and Hutu stereotypes as reference points for describing or explaining others’ behaviour. I occasionally heard Butare residents express concern that contemporary post-genocide politics reinforce old ethnic stereotypes. An elderly Tutsi survivor, who was critical of the gacaca courts, once remarked to me that the trouble with them is not only that the civilian judges are poorly trained but also that their conduct reinforces the stereotype of the “tricky Tutsi,” even as not all judges are Tutsi by heritage. “It’s cruel, truly,” he said. “These poor peasants are invited to come testify to what they know and they end up getting sentenced even when they aren’t the ones on trial. This does nothing to solve our problems” (June 2008, Butare). Finally, as a Hutu Catholic priest explained about the politics of his work, “You must be careful about people thinking you favour your own ethnicity. Sometimes it’s hard for people to know what you are, though! For example, if you’re Hutu but you show cleverness or become powerful, people will say you must have been influenced by Tutsi because you are more Tutsi than Hutu” (February 2009, Butare).

In other words, the overlap between ethnicity and other forms of difference is part of existing socio-cultural frameworks in Rwanda such that when Charles and others make choices like participating in physical labour or performing the role of a good patron or good client, ethnic stereotypes, positive or negative, are always already implicated. Everyday social relationships put people in positions that are marked by ethnic stereotypes whether the social actor openly expresses such an interpretation or not. But in light of the sensitive political moment in Rwanda, what remains beyond the grasp of the researcher (and Butare residents) is absolute certainty about when a particular social actor is “thinking ethnically” about an interaction or viewing it in terms of the class-, education-, region- or wealth-based categories from which ethnicity is inseparable. Hence, I return now to the preceding two social situations to consider how rigid and mutable ethnic boundaries collide in Charles’ acts of moral agency, that is, in his deliberate actions based on “strong evaluations” of the worth of his choices—evaluations made at least partially against the constellations of positive and negative qualities that comprise ethnic stereotypes.

Fixity, Flexibility and Their Limits

In light of this brief historical and conceptual examination of ethnic stereotypes and their relation to local forms of moral regulation, the two social situations at the centre of this article speak to the everyday convergence of inherited and situational ethnicity. I use *Hutu* and *Tutsi* in this analysis not to imply that, if asked, Charles (or others) would have said they were actively performing “Tutsi” or “Hutu” qualities but, rather, as a useful shorthand to point out how the qualities and conduct performed in these two situations are marked by popular ethnic stereotypes. In Charles’ case, he is often situationally marked by the stereotypes of Tutsiness in spite of his Hutu ethnic descent category. His doctorate from a Belgian university, coupled with his work as an NUR professor, marks him as a member of a “traditional” elite set apart by wealth and education. The sources of Charles’ privilege share the pattern established by the colonial education system in Rwanda that produced “Tutsi” privilege by virtue of ties to the world of the modern West.

What is compelling about these social situations is that in neither case was Charles’ Hutu heritage enough to definitively offset the social dangers of “Tutsi” wealth and education. In social-relational, situational terms, Charles’ position in the patronage relationship with his neighbour “overrode” his Hutu descent category and lent him the stereotypical capacities of Tutsiness. In patron–client exchange in Rwanda, the patron role is tied to Tutsi stereotypes and the client role to Hutu ones, an opposition that hardened, in no small part, owing to colonial era ethnography in Rwanda (e.g., Maquet 1961). However, Charles attempted, in another act of moral agency bound up with stereotypically Hutu valuations of equality, to downplay the ethnically marked hierarchy between them by temporarily emphasizing the friendly dimensions of his neighbour’s visit over the transactional ones. She participated in this act through her willingness to engage in friendly chatter with Charles to show that she saw him not as a mere economic resource but as a neighbour or friend. Whether Charles’ performances are received as intended, however, is another matter. On the one hand, his clients may spread his reputation for generosity and bolster his “Hutu” concern for redistribution, access to education and equal sharing of the benefits of modernity, a positive outcome with its own double edge since this increases the number of supplicants who arrive on his doorstep. Indeed, I heard town residents characterize Charles as someone who has sympathy for the poor because he was not born into urban privilege. On the other hand, Charles’

patron role and his effort to downplay it potentially increase his vulnerability to the social dangers of “Tutsi” wealth and privilege. He is open to the accusation that, like a “Tutsi,” he wants to trick clients into servitude with overtures of friendliness, a possibility that is captured in comments I routinely heard from Butare residents of all income levels about how the wealthy will give only if they think they can get something in return. Hence, shared Hutu heritage between Charles and his neighbour is not enough to level the hierarchy of patron–client exchange, and it must be performed in ways that can either succeed or fail.

In the first social situation, umuganda, relations of work brought out Charles’ “Hutu” capacities for physical labour. To have a reputation as someone who, despite wealth and privilege, “knows how to work hard,”⁶ Charles recognizes the significance of shared physical work in forging good relationships. Indeed, the criticisms levelled at those who passed the workers without joining in attest to umuganda’s importance. Given the history of umuganda being co-opted to serve elites and given that the *chef du quartier* worries about completing the work because many residents opt out of participating, Charles can perform the positive qualities bound up with his Hutu descent category and set himself apart from Tutsi stereotypes of a lazy, exploitative elite. To share in physical work with low-income town residents is an act of moral agency whose value rests on the vision of social equality between good “peasant citizens” first glorified by PARMEHUTU and its supporters.

However, Charles’ participation in umuganda may not have a singular interpretation because his Hutu heritage is not sufficiently powerful to conclusively define what “kind” of person he is. He, along with the other affluent neighbourhood residents at umuganda, worked separately from their low-income neighbours. The humble act of taking part in shared agricultural work was complicated by the act of setting themselves apart from the urban poor (although it is worth noting that the urban poor may have chosen to separate themselves from the affluent). The ambiguities of these acts are symbolically well captured in affluent residents’ pairing of brand-name athletic clothing with the knee-high rubber boots typically worn by cultivators, as well as in their teasing about each other’s lack of agricultural skills. Here, it is the social-relational dimensions of ethnicity that place limits on how Charles can perform the admirable traits marked by his inherited Hutuness. Indeed, as a Hutu by descent and someone who grew up cultivating with his family on a rural hill, Charles might be well positioned to fit in with his low-income neighbours and perform solidarity with them through shared work.

However, his class and status ultimately limit his capacity and, perhaps, also his desire to be “of” the low-income majority. As the priest remarked above, one is easily perceived as “more Tutsi than Hutu” if one is close to power.

Be that as it may, it would be a mistake to read ethnic descent categories as always flexible or open to question in Rwanda today. As much as social agents know how to put the ambiguity and flexibility of ethnically marked categories to work, the politics of the violent past simultaneously produce rigid ethnic boundaries that in some situations make inherited ethnicity difficult to escape. Charles must contend with the suspicion that has been cast on all Hutu men in the post-genocide moment, since RPF politics paint all those occupying the status of Hutu male as potential *génocidaires*. Indeed, Charles’ mindfulness of these dangers demonstrates that his descent category can never be completely overcome by the ethnic markings of his class position. Even though Charles lost a close family member to the violence of 1994, he cannot publicly mourn that loss (see Burnet 2009; Vidal 2004). He attends the annual genocide commemorations but must do so as a mourner for Tutsi victims, not for his Hutu father or, at least, not openly so. He knows the importance of situating himself on the side of RPF unity and reconciliation initiatives, and so he participates in conferences and *sensibilisation* meetings aimed at understanding and preventing future violence. And even as his participation in these initiatives and his own scholarship help to legitimate today’s official narratives of Rwandan history and ethnicity, his reticence about his activities during the period of the civil war through the genocide belies anxieties surrounding the questions that Rwandans so often wonder about with regard to each other: Where were you in 1994, and what were you doing? How are you situated in terms of “citizenship categories” (Doughty 2011) of victim, perpetrator, returnee, “moderate Hutu” or survivor? As others have shown (e.g., McLean Hilker 2009:90), these questions are ways that Rwandans know how to “get at” ethnicity in its rigid, descent-based manifestations, just as they know how to make “ethnic” commentaries on situational conduct through reference to stereotypes based on wealth, status or behavioural traits.

As I already suggested, a direct inquiry to Charles or other Butareans as to whether they were actively categorizing each other as Hutu or Tutsi in these situations would not receive an answer that a researcher could easily take at face value given today’s strict state prohibitions on openly ethnic talk. And yet the interpretive problem remains. We can still wonder, Was Charles “thinking ethnically” in these situations, and

were his interlocutors? Indeed, what does it mean to “think ethnically”? Must one think or say the term *Hutu*, or is an oblique reference to Hutu traits enough, since people can always take what they want from it (see McAllister 2013)? In Charles’ case, this problem is compounded by his status and position in the social world of Butare. While his relationships reveal especially starkly the complex operations of ethnic boundaries, his social position is not without constraints. Even though I had known Charles for five years at the time of my fieldwork and he trusted me not to inform on him to the state for using ethnic labels, he still took care to present himself to me as someone who, by virtue of his education and experiences in Europe, is “above” thinking in terms of “parochial” schisms like ethnicity. More generally, Butare residents take pride in the town’s reputation as a bastion of peaceful inter-ethnic relations (Jefremovas 1997), and they cite the local resistance to the genocide for weeks after it had begun in Kigali as evidence that ethnicity “doesn’t matter” in Butare the way it does elsewhere. Indeed, educated residents’ desire to espouse liberal attitudes toward ethnicity, and the fact that their livelihoods depend on the legitimation of the RPF account of ethnicity, may go some way to explaining why other researchers (e.g., Fujii 2009; McLean Hilker 2009) found more frequent, open references to ethnicity, whereas Charles and other high-status Butareans carefully—compulsively, even—avoided them.

In light of these interpretive uncertainties, does studying ethnicity in Rwanda today inevitably mean arriving at an interpretive impasse? As Carlota McAllister (2013:110), drawing on Frank Kermode (1979), proposes, the impossibility of interpretive certainty is not necessarily a failure because of what we can learn from the problem of uncertainty itself. The world and its interpretations, Kermode (1979:145) reminds us, are “hopelessly plural.” Even though I cannot be certain when Charles or others are thinking ethnically, the question is nonetheless worth pursuing because it places the researcher in the same practical ambiguities that Butare residents face, namely, the open-endedness of when ethnicity matters, how it matters and with what effects. While anthropologists have been aware of the complex intersection of rigid and flexible ethnic boundaries, especially in the context of post-colonial urban settings (e.g., Barth 1969; A. Cohen 1974), the Rwandan context is nonetheless an important site in which to revisit it. Indeed, the centrality of ethnicity in Rwanda’s violent past renders the question of how one can be placed “ethnically” especially pressing, not only at the level of the state formation agenda, but also in everyday practice.

Conclusion

Ethnicity, Fujii (2009:111) writes, is not one “thing” but many. Ethnicity in Rwanda (and elsewhere) is compelling precisely because it is both fixed and flexible and therefore forestalls apprehension by frameworks with a singular focus on its absoluteness or its fluidity. People evaluate each other both in relation to the Hutu–Tutsi opposition of the violent past (Doughty 2011:24) and in relation to standards of moral regulation (Corrigan and Sayer 1985) that, as the brief discussion of state formation demonstrates, have much longer histories entangled with Tutsiness and Hutuness. Thus, even as rigid configurations of ethnicity take on special significance at certain historical moments—as in the crystallization of political parties around ethnicity at independence, in the genocidal constructions of the 1990s or in the RPF’s rigid Tutsi/victim versus Hutu/perpetrator dichotomy—there has never been a single criterion that Rwandans can use to conclusively and in all situations resolve how they and others belong ethnically (C. Newbury 1988:51–52). Ethnicity during the Rwandan genocide had an unmistakable binary quality, but in everyday life it simultaneously matters in ways that exceed the question of heritage. Indeed, the forms of moral agency and self-presentation that Butareans deploy in everyday life—be it opting into *umuganda*, tempering patron–client hierarchies or being reticent about what one was doing in 1994—are marked by ethnic stereotypes and bound up with the intersection of both rigid and social-relational dimensions of ethnicity. These dual configurations of “the ethnic,” coupled with the post-genocide moratorium on ethnic labels, render the question of how ethnicity matters today compelling, fraught and also elusive, not only for the ethnographer but also for Rwandans.

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Notes

- 1 These are abstractions commonly used in the literature (e.g., Burnet 2012; Fujii 2009; Lemarchand 2002) that refer to the shifting and hybrid loci of qualities (phenotypic, cultural, moral) that people perceive “ethnically” (Lemarchand 2002). They are not strict, reified dichotomies but conceptual tools for thinking about how everyday forms of social action are marked by ethnic stereotypes.
- 2 Identifying details have been changed to protect Charles’ identity.
- 3 The valorization of “Hutu” visions of equality carried through to the Second Republic (1973–94) of President Habyarimana, who staked his legitimacy on development for the rural majority (see Verwimp 2000).
- 4 Ubuhake is the form of clientship on which the well-known rigid colonial formulation of Tutsi patrons (cattle owners) and Hutu clients is based. See Maquet 1961 for a classic formulation of this account.
- 5 It is important to note that these stereotypes do not imply that those who inherited Tutsi ethnicity through patrilineal descent never occupied the client role in a patron–client relationship, but what I focus on here are the ethnic markings of patron and client roles.
- 6 This phrase came up with remarkable frequency in routine conversation with Butare residents as they evaluated each other’s moral worth and capacities for hard work.

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The “Ethical” Framework for Counterinsurgency: International Law of War and Cultural Knowledge in the *U.S. Army and Marine Corps Counterinsurgency Field Manual*

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Abstract: U.S. military campaigns in Iraq and Afghanistan elicited moral and legal justifications by their reluctant liberal supporters. But after the rise in combatant and civilian casualties, especially in Iraq, the U.S. military shifted its attention toward softer methods of winning these wars. The *Counterinsurgency Field Manual* was published within the context of these ethico-legal and military concerns. This manual proposes a “new” counterinsurgency doctrine, which claims to rely on international law of war and social scientific knowledge to train counterinsurgents and directs them to learn cultural knowledge to wage an “ethical” war.

Keywords: *Counterinsurgency Field Manual*, war on terror, international law, cultural knowledge and war, ethical violence, 11 September 2001

Résumé : Les campagnes militaires américaines menées en Iraq et en Afghanistan ont suscité des justifications légales et morales de la part de leurs partisans libéraux, peu enthousiastes. Suite à la montée des pertes civiles et militaires, surtout en Iraq, l’armée américaine s’est tournée vers des méthodes plus douces afin de gagner ces guerres. On a publié le *Manuel de terrain de la contre-insurrection* dans le contexte de ces préoccupations éthico-légales et militaires. Le Manuel propose une « nouvelle » doctrine de la contre-insurrection, qui prétend se rattacher au droit international de la guerre et au savoir des sciences sociales, pour former des agents anti-rébellion : il s’agit de les inciter à apprendre, ainsi qu’à utiliser, des notions culturelles pour faire une guerre « morale ».

Mots-clés : manuel de contre-insurrection, guerre à la terre, droit international, connaissance culturelle et guerre, violence « éthique », le 11 septembre 2001

When I took a decision or adapted an alternative, it was after studying every relevant—and many an irrelevant—factor. Geography, tribal structure, religion, social customs, language, appetites, standards, all were at my finger-ends.

—Colonel T.E. Lawrence, 1933¹

Introduction

The U.S. military turned cultural knowledge into a counterinsurgency weapon as part of its “ethical” and “gentler” approach to the wars in Iraq and Afghanistan. Culture was officially weaponized with the initial publication of the *U.S. Army and Marine Corps Counterinsurgency Field Manual 3-24*² in 2006 (Davis 2010, 2014). General David Petraeus was the mastermind behind the *Manual* and the new counterinsurgency doctrine. “Conducting a successful counterinsurgency campaign,” he and General Amos wrote in the foreword to the *Manual*, “requires a flexible, adaptive force led by agile, well-informed, culturally astute leaders” (U.S. Army 2007[2006]:xlvi) who can understand “the people, their culture, their social structures and how systems to support them are supposed to work” (Petraeus 2010:116). The *Manual*, the Human Terrain System (HTS)³ and similar programs were developed by the U.S. military to achieve these counterinsurgency goals.

The ethically and legally contentious basis for the wars in Iraq and Afghanistan, and covert operations globally, elicited moral and legal justifications by some of their liberal supporters (Ignatieff 2005). The use of torture by the CIA (e.g., waterboarding) on prisoners of the “war on terror,” sexual abuse and torture of Iraqi prisoners at the Abu Ghraib Prison in Iraq by U.S. military personnel and the imprisonment of “suspected terrorists” as “unlawful combatants” at Guantanamo Bay, Cuba, were some of the more publicized instances where the legal and ethical nature of these wars and their conduct was questioned. The new *Manual* was therefore introduced to ethically and legally justify the use of force by the U.S. military in its counterinsurgency

campaigns in Iraq and Afghanistan. Sarah Sewall, in her introduction to the University of Chicago Press edition of the *Manual*,⁴ thus directs the *Manual*'s critics to its most celebrated point,⁵ namely, that the *Manual* was produced as a "military doctrine" within the framework of Just War theory in international law (U.S. Army 2007[2006]:xxxii). The Just War framework she refers to is based on the premise that war is necessary and that to enter the "*jus in bello* frame" is to enter into debates about how to conduct war morally and ethically (xxxii).

In this article I examine the *Manual*, literature on the international law of war, and the recent discussion in anthropology about the *Manual* and the use of culture in counterinsurgency doctrine and practices since 11 September 2001.⁶ I argue that both international law and the counterinsurgency doctrine create "categories" that enable justifiable violence. Those who do not fit into the appropriate categories are considered expendable through violence. Both doctrines use the same rhetorical and accompanying politico-moral strategy: inclusion and exclusion through the definition of categories that enable and justify violence on those who are "outside" the appropriate categories. The *Manual* only appears to be inclusive through its attention to culture. However, what is at work here is precisely a logic that Achille Mbembe (2003) has described as the logic of cultural "necropolitics."⁷ Culture, in this context, functions as a domain of surveillance that subjects locals to a space of exception and then turns them into expendables. As discussed later in the article, it becomes clear, in fact, from the accounts of the U.S. military commanders on the ground that "culture" (even ostensibly that of "others") is to be used purely instrumentally to bring about the ends of the military and its society's culture. Only one culture and its interests and needs are to count in the end. All others are manipulated to serve it.

After 11 September 2001, wars waged by the United States and its allies have reinvigorated debates about Just War.⁸ The theory of Just War is "an argument about the moral standing of warfare as a human activity," which states that "war is sometimes justifiable and that the conduct of war is always subject to moral criticism" (Walzer 2004:ix). The introduction of the *Manual* as a military doctrine and the debates about its utility in the so-called counterinsurgency campaigns in Iraq and Afghanistan (Vizzard and Capron 2010), legal contestations about what constitutes torture (Greenberg and Dratel 2005), debates about the legal status of "enemy combatants" in the war on terror (Ahmad 2009), and, most recently, the legal status of drone attacks in inter-

national law—and of those killed in these attacks—in the northwestern tribal and settled areas of Pakistan (Finkelstein et al. 2012) are part of the recent debate about the relationship between ethics, violence and international law. Although anthropologists have critically examined the *Manual*, the introduction of the HTS in Iraq and Afghanistan and the recruitment of social scientists in this program (González 2009a), Sewall's claim that the *Manual* is based on the principles of international law and, therefore, that its critics should examine it on those grounds remains unexplored.⁹ I proceed, first, by discussing some of the recent arguments about the increasing use of law in war, to show how, in making the case for a "just war," there is an attempt to justify and even moralize violence. Here, I question the notion of "ethical" violence as it is framed as the basic category of military/state violence in the *Manual*. I then discuss the use of cultural knowledge in the *Manual* and examine the assumptions underlying the military's turn toward culture. I conclude by discussing how the U.S. military has deployed the "new" counterinsurgency doctrine in Iraq and Afghanistan.

International Law and the Ethical Framework for Violence: "Combatants," "Civilians" and Their Intentions

Sewall begins her introduction to the *Manual* by pointing toward the "moral anxiety" felt by the American nation and its military in their recent wars (U.S. Army 2007[2006]:xxii). This anxiety, she explains, is caused by the "asymmetric challenge" posed by the insurgents, who exploit "traditional ethical and legal constraints on the use of force" (xxii). This asymmetry, as she puts it, raises the question of how to fight these insurgents ethically. Sewall answers that the *Manual* is "radical" in the sense that "it demands significant change and sacrifice to fight today's enemies honourably"; that is, according to the standards of international law (xxi). The *Manual*, she explains, is "cognizant of international rights standards, expectations of accountability and the transparency that accompanies the modern world" (xxxiv). However, claiming to resort to the values of international law in order to use violence morally against a "dishonourable" enemy rests on two key assumptions about the relationship between law and violence. These are, first, that law (in general, and international law, in particular) restrains violence and, second, that the violence of "insurgents" and "terrorists" is categorically unethical and unjustified. Discussing recent works on international law, violence and ethics (see Altman 2012; Asad 2010; Weizman 2010), I examine both of these assumptions below.

Eyal Weizman, in his work on the increasing attention to international law by the Israeli Defence Forces (IDF), has examined the relationship between “military development” and “legal technologies,” known as “lawfare—the use of law as a weapon of war” (2010:13). He argues that, rather than restricting violence, the IDF’s increasing resort to international humanitarian law has resulted in increased destruction and suffering for the Palestinians. Weizman examines Israel’s assault on Gaza in 2009 and argues that legal experts working with the IDF provided interpretations of international law that the military used to expand the “elastic limits of the law” (24). Specifically, the IDF’s legal experts advised it to use pamphlets, telephone calls and loud-speakers to warn Gazans to vacate their residences before they were destroyed. Those who remained became designated as “combatants” and lost their status of “civilians,” while at the same time their residential buildings became legitimate military targets. Mass warnings were used to shift persons between legal categories (22). As one received the warning call from the IDF, one’s legal status might have changed from “an ‘uninvolved civilian,’ protected by international humanitarian law, to a voluntary ‘human shield’ or even to a person taking part in hostilities who could be killed as a ‘legitimate target’ (22). Weizman concludes that “operating at the margins of the law”—by working in the grey zone—is a way to expand legal boundaries (24) and, I would add, a way to deliberately blur the categories of civilian and combatant and legitimate and illegitimate targets.¹⁰

Sewall celebrates the application of international law in the “new” counterinsurgency doctrine, claiming that it provides the “ethical framework” to restrain war and violence (U.S. Army 2007[2006]:xxxii). But the relationship between law and violence is not, as she assumes, a simplistic one in which the former constrains the latter. Working at the margins of law and manipulating the boundaries between legality and illegality expand rather than restrict the scope of violence by bringing the “undesired” into the domain of the “legal,” where they may then be subjected to “ethical” violence. As Talal Asad notes, “the law of war does not provide a set of ‘civilizing rules’” but rather “a language for legal/moral argument in which the use of punitive violence is itself a central semantic element” (2010:3). The movement across and the manipulation of legal categories are essential to deciding (and accepting) who is a legitimate target and deserves to be killed and who is not.

This blurring of boundaries between civilian and combatant also features in the recent debates on the U.S. government’s increasing use of drones and other means of targeted killing of “suspected terrorists.” In a

recent book on these debates, *Targeted Killings: Law and Morality in an Asymmetrical World* (Finkelstein et al. 2012), which brings legal theorists, philosophers and military officers together, Colonel Mark Maxwell, a staff judge advocate of the U.S. Army, explains that civilian and combatant are two recognized statuses in the international law of war. However, Israel and the United States, he further explains, have added a third category: “unlawful combatant” (2012:47–48).¹¹ This category designates persons against whom lethal force, without proportionality—which must be adhered to under the regular conduct of war between *lawful combatants*—is permitted (46–47). According to the law of war, terrorists and insurgents can be categorized as *unlawful combatants* (as opposed to state agents of violence) because they conceal their intentions (to harm), their preparations (to attack and fight other combatants), their identity as hostile enemies and the weapons they wish to use (McMahan 2012:139). The *Manual* follows this categorizing of lawful and unlawful combatants and speaks of insurgents as those who “hide among the people” and are “deceptive,” rather than fighting openly and honourably (U.S. Army 2007[2006]:52). The unlawful combatants are thus unlike lawful combatants, who are uniformed, openly armed and hostile and are thus identified as having the intention and agreement to inflict and receive harm. Therefore, it is the concealed intent and identity of the terrorist that differentiates his or her violence from that of the state and makes it unlawful.

In his introduction to *Targeted Killings*, Andrew Altman examines the arguments put forward to morally justify state violence. He argues that terrorism can be approached as a “factual question” that can be decided by the criteria of probing the “intent and purpose behind” an act to “proceed to judge the act as an egregious moral wrong” (2012:4). The moral difference, Altman explains, between the collateral damage caused by the state, in which civilians are harmed, and the acts of terrorists, who also harm civilians, is one of intent. He explains: “even if the intentional killing of civilians can be justified in certain extreme situations, the general moral prohibition against intentional killing of the innocent would seem to be stricter than the prohibition against foreseeably but non-intentionally killing the innocent” (4). The violence of the state and the occupying military forces, then, appears morally different in nature from that of insurgents because of their intentions not to harm civilians *deliberately*. The *Manual* follows this approach to violence and advises soldiers that they “may take actions where they knowingly risk, but

do not intend, harm to non-combatants" (U.S. Army 2007[2006]:245).

Intent behind violent acts is then what must be probed to differentiate between ethical and unethical violence, according to Altman and other scholars of international law. However, Asad criticizes this "new urge to moralize the use of violence" (2010:3) since 11 September 2001 in liberal Western states by resorting to Just War theory and emphasizing the role of actors' intentions. Asad questions the distinction between "war (civilized violence) and terrorism (barbaric violence)" and argues that the similarity of both forms of violence becomes clear if we "set intentions aside, such as the deliberate or accidental killing of 'innocents'" (3). In the conducting of counterinsurgency operations, in which civilians are frequently killed, it is indeed difficult to determine, despite the claims made by state militaries, whether those killed by soldiers or drones with "precision strikes"¹² were indeed insurgents (unlawful combatants) or just civilians. In the conflicts in Iraq and Afghanistan, as Asad notes, "the 'innocence' of civilians often cannot be determined in advance," and their killing worries liberals because "legal and moral boundaries are easily breached" and the line between "soldier," "insurgent" and "civilian" often becomes "obscure" (11–13). In the section on ethics, the *Manual* reassures soldiers about these categorical ambiguities by advising them that their violence may be necessary and justified insofar as the force used is required to accomplish a mission and/or secure the lives of soldiers; the soldiers may then risk harming civilians *but without the intention* to harm them (U.S. Army 2007[2006]:245). However, it is not clear who would decide on the proportionality and how, when the sought-after (military) objectives demand full use of force against an enemy that has already been designated as "unlawful." Sewall explains that while the *Manual* asks the counterinsurgents to use minimum and proportional force, this may not always be possible, given the "uncertainty about who is a civilian and who is hostile" (U.S. Army 2007[2006]:xxvii–xxviii).

However, this uncertainty about the civilian status is in fact tied to the emergence of the category of unlawful combatant in international law (Wilke 2014:3). The status of unlawful combatant obscures the status of civilian because whoever is not a combatant, according to the laws of armed conflict, is a "non-combatant" (3), thus making the category of (innocent) civilian doubtful and easy to shift around. For Sewall and other reluctant proponents of state violence, there seems to be no ambiguity in the status of their (state's) combatants and about their moral edge to kill as opposed to the moral right of those who resist them. In the Gaza conflict of August

2014, although Israeli civilian and military deaths were clearly categorized and reported, the civilian status of dead Palestinian men was never clear: most were put in the category of the "unknown role" (Wilke 2014:2).¹³ Denying civilianhood to justify killing of non-combatants is tied to denying that "the enemy" is a lawful combatant. This is because whoever is not a combatant is defined as a non-combatant, but when and how these non-combatants get categorized as civilians or as unlawful combatants (and hence legitimate targets) remains in the grey zone of the law and varies according to the interests of the state and its militaries.

Here, acquiring cultural knowledge and collecting intelligence are introduced by counterinsurgents not only because they want to moralize their violence and win over the locals by claiming to target those who "ethically" deserve it but also because they see the insurgents' violence as deeply shaped by their culture rather than "rational" law and politics. In justifying counterinsurgents' violence, the *Manual* explains that by using cultural knowledge and local intelligence, they can avoid "unintended harm" and act as surgeons, "cutting out cancerous tissue while keeping other vital organs intact" (U.S. Army 2007[2006]:41). In the following sections, I explore how and in what ways cultural knowledge and local intelligence are to be used to isolate "insurgents" from "civilians" and the assumptions underlying and consequences resulting from such an approach.

The Counterinsurgency Manual and the Uses of Cultural Knowledge

According to the *Manual*, separating civilians from insurgents is one of the most important elements of a successful counterinsurgency. However, Sewall and the U.S. military are well aware that resistance to military occupations always builds on local support. The embeddedness of resistance locally creates "moral dilemmas" about the military's use of violence because of its "inability to distinguish between combatant and non-combatant as the law of war requires" (U.S. Army 2007[2006]:xxvii). Learning from past imperial counterinsurgency campaigns of the British and the French, the *Manual's* and Sewall's proposal is to "assume more risk" (U.S. Army 2007[2006]). This requires the soldiers to closely interact with the local population to gain a better understanding of the "human terrain," which, it is assumed, might result in effective offensive operations.

The Network of Concerned Anthropologists (NCA)¹⁴ has criticized the recruitment of anthropologists and other social scientists to serve the knowledge needs of the military and the use of cultural knowledge in the

Manual and the HTS. In the NCA's response to the *Manual*, *The Counter-Counterinsurgency Manual*, Roberto Gonzáles says that the HTS program is marketed in the media "as a life-saving initiative that is establishing a kinder, gentler, U.S. military presence in Iraq and Afghanistan" (2009b:100). In the same volume, David Price criticizes the *Manual* as a "new dream of cultural engineering" (2009:60), while Andrew Bickford argues that, for the military, "the *Counterinsurgency Field Manual* and HTS are about human intelligence collection in which anthropology is used as a cover" (2009:137). There are indeed troubling resonances between the methods that the *Manual* asks the military to use to collect local intelligence and the ethnographic methods of data collection that anthropologists often use. Bickford explains that "both work with people and are interested in gathering and garnering information about people ... Both utilize 'informants' ... interact with people, observe, collect data, analyze and write up findings and interpretations" (141).

A reading of the *Manual*, however, shows that there are certain assumptions underlying the military's imitation of ethnographic methods for counterinsurgency. For example, the *Manual* directs those executing counterinsurgency operations to live among the people (U.S. Army 2007[2006]:185). This will, in turn, bring soldiers, it is presumed, close to the locals, so that they can, first, separate insurgents from civilians and know how the former mobilize and build support and, second, learn about the local alliances and networks that insurgents, and now counterinsurgents, may tap into, exploit and manipulate. This, as I explain below, is what commanders think cultural knowledge is about and in this way it should be used as a weapon against the insurgents.

Listening to the locals in culturally attuned ways, knowing the needs of the local communities and then acting on them, becomes the key, according to the *Manual*, for the counterinsurgents to distinguish insurgents from civilians. Being culturally attuned is assumed to do more for the counterinsurgents, though. As anthropologist Brian Ferguson notes, "being culturally attuned is expected to give U.S. forces almost a sixth sense in dealing with local populations" (2013:89). According to a Department of the Army document, such an approach will anticipate and detect "subtle changes within the population. Actions inconsistent with the population's behavioural norms could be indicators of guerrilla activity, internal conflict or the confirmation or denial of intelligence" (Ferguson 2013:89). The culture would then act as a domain of surveillance, in which locals could be categorized as dangerous (to the occupation) based on certain deviations from the cultural

norms. In other words, the logic of "cultural necropolitics" would work as such that "the natives" would be subjected to the expert surveillance of culture (as imagined by the occupation), such that those who seemed to be an aberration of the culture enter a legal space of exception as human targets.

In comparable ways, the classification of locals according to different social and cultural categories was one of the ways in which colonial powers exercised sovereignty (Mbembe 2003:25–26). Colonial powers created "a large reservoir of cultural imaginaries" that "gave meaning to different categories of people for different purposes within the same space" (26). Occupation and management of the space—which went hand in hand with the categorization of locals within it—was how necropower operated in the colonial context (26–27). Sovereignty, in this fundamental sense, meant "the capacity to define who matters and who does not, who is *disposable* and who is not" (27). Much like the colonial schedules and lists of categories, in the current context the use of "Culture Smart Cards" that list cultural characteristics (based on the national character studies model of 1940s and 1950s cultural anthropology) and training in the mock Iraqi and Afghan villages were designed to not only familiarize U.S. soldiers with these occupied spaces and cultures but also train them to identify and categorize men and women within them (Davis 2010).

There is, of course, no monolithic form of engagement with the notion of culture in the U.S. military, and the understanding of culture and the uses of cultural knowledge have shifted historically (Brown 2008). However, the significance given to acquiring cultural knowledge in the *Manual* is based on a particular understanding of Culture. It is assumed to be a blueprint for individuals' actions. In other words, culture is thought to provide a script that directs actors' actions and that if counterinsurgents learn cultural knowledge, they will be able to better read and understand those actions, identify deviations and categorize persons. That is why culture is presumed to have a defining relationship to violence and politics at the local level. A star consultant of the HTS program and supporter of the *Manual*, anthropologist Montgomery McFate, explains this point:

Neither al Qaeda nor insurgents in Iraq are fighting a Clausewitzian war, where armed conflict is a *rational* extension of politics by other means. These adversaries neither think nor act like nation-states. *Rather, their form of warfare, organizational structure and motivations are determined by the society and the culture from which they come.* [2005:43, emphasis added]

According to McFate, the cultural and social context in which “insurgents” and “terrorists” live, influences and shapes their actions (rather than vice versa). History and politics—including the political role and violence of the occupying forces—and the ways they have affected the culture and shaped the social context of violence at the local level, are ignored in McFate’s account of insurgent violence. Insurgents’ violence can easily be categorized as “barbaric,” and hence “unethical,” because it does not result from “rational” politics and law but rather from their culture, which then becomes the domain of knowledge and surveillance for the counterinsurgents.

Counterinsurgency on the Ground: Uses of Cultural Knowledge in Iraq and Afghanistan

For the U.S. military, the objective behind gaining cultural knowledge is how it can be used to manipulate networks and alliances by mapping the structures of power and patronage at the local level. Under the heading “Power and Authority,” the *Manual* explains:

Once they have mapped the social structure and understand the culture, staff must determine how power is appropriated and used within a society ... *Understanding power is the key to manipulating the interests of groups within a society* ... Informal power holders are often most important. They may include ethno-religious groups, social elites and religious figures ... For each group in [the] AO, the counterinsurgents should identify the type of power the group has, what it uses the power for ... and how it acquires and maintains power. [U.S. Army 2007[2006]:94–95, emphasis added]

For the counterinsurgents, the focus on cultural knowledge and intelligence in the *Manual* translates into what is considered critical in countering any insurgency: understanding local-level politics, power and authority and how to utilize, exploit or restructure them for counterinsurgency purposes. As the following accounts of military operations in Iraq and Afghanistan show, for the U.S. military and its commanders, cultural knowledge is a weapon to be used on the ground to identify and target insurgents.

Lieutenant Colonel John Nagl (retired), a contributor to the *Manual*, served in Iraq in 2003 and 2004. In Iraq, he explains, American soldiers confronted an enemy who was “ruthless, and all too often invisible” (2005:xi), making it necessary for the battalion he served with to shift focus from “battle-tracking enemy tank platoons and infantry squads who fought in plain sight,

to identifying and locating an insurgent enemy who hid in plain sight” (xiii). Nagl explains that “the enemy we faced could only be defeated if we knew both his name and address—and, often, the addresses of his extended family as well” (xiii). For Nagl, this shift in tactics meant gaining local knowledge, which entailed mapping of kinship, political networks and power structures. Thus, “understanding tribal loyalties, political motivations and family relationships was essential to defeating the enemy we faced, a task more akin to breaking up a mafia crime ring ... ‘Link diagrams’ depicting who talked with whom became a daily chore for a small intelligence staff” (xiii). Local knowledge, therefore, served the purpose of surveilling the locals to identify insurgents and their support among the civilians.

Lieutenant Colonel Jim Crider, a battalion commander in Iraq during 2007–2008, was among the first officers to implement the lessons of the *Manual*. In his working paper as a fellow at the Center for a New American Security, *Inside the Surge: One Commander’s Lessons in Counterinsurgency*, Crider tells us that his early difficulties resulted from the absence of a “wide-ranging intelligence network” that could have been used to identify the “insurgents hiding among the population” (2009:8). In Baghdad, Crider’s area of operations, the local Sunni political leaders had been delegitimized because of the collapse of the state structure and the absence of the funds they had relied on for their authority and patronage. Into this vacuum entered Crider and his men, who had the money, contacts and military resources to provide “security” and “governance” and thereby to take the role of local patrons capable of building a ground-up intelligence network. Crider initiated trash collection programs, which provided jobs for local men, and “distributed money in the form of rewards for information, micro-grants for small businesses, salaries through local contracts and condolence payments” (15). Crider explains that “money gave us the means and political capital to motivate otherwise wary residents to help. Authority without money would have reduced us to pleading with citizens to cooperate” (15). Crider concludes that to use local people as allies against the insurgents requires a “deep understanding of the cause of the insurgency as well as the culture in which it is taking place” (19). By learning the culture, collecting local knowledge and providing rewards and opportunities under the control of the occupying forces, Crider claims that he was able to create a local network of allies and intelligence for effective counterinsurgency in his area.

In Afghanistan, the U.S. military has been deploying similar counterinsurgency tactics to those Crider and Nagl applied in Iraq. For the counterinsurgents in

Afghanistan, knowing the culture has entailed knowledge of tribal networks, alliances and politics. This has resulted in essentializing the tribal character of Afghan political and social life (González 2009a),¹⁵ hence the much-celebrated meetings of military and civilian officials with the Afghan “village elders” and “tribal leaders” to win their “hearts and minds” through presents of cash, development aid and contracts. This form of alliance-making with the “traditional” power-holders continues in the form of arming tribal allies and former “warlords” (now working as subcontractors in the war economy), whose militias have proved critical in protecting occupying forces and their logistical routes (Hussain 2012).

The *Manual* is attentive to how patronage systems may be restructured or managed locally through access to formal and informal economic and political resources, which Crider claims he built in Iraq. This has meant counterinsurgents’ intervention in local power structures. The violence of the counterinsurgents and the resources they control and provide in the form of development aid and contracts, as well as their access to the resources of an occupied state, play a key role in shaping local-level politics, power and patronage systems. Counterinsurgents’ use of cultural knowledge and local intelligence to separate civilians from insurgents and to politically and materially cut the latter off from local support have had long-lasting political and social implications for Iraqis and Afghans, whose violence, resulting from ethnic, tribal and sectarian divisions (which have been exacerbated by the intervention of the counterinsurgents), is then attributed to their culture.

Conclusion

The increasing use of international law in combat by state militaries facilitates their claim that the violence of war can be regulated and moralized. The training of soldiers to act as cultural experts and social workers (and vice versa) is an attempt to morally justify recent wars and the killing and suffering caused by them. Here, culture, as well as the social science disciplines that claim to specialize in its study, have been instrumentalized for these purposes. To assert that the *Manual* and the HTS can make possible a “humane” and “ethical” war is an important shift in reframing the claims and practices of imperial wars. Moreover, as Price (2009) and others have noted, it is a marketing move to represent U.S. military campaigns in Iraq and Afghanistan as a “kinder, gentler” form of military occupation (González 2009b:100).

Resorting to international law in war is also an attempt to ease the “moral anxiety” of those who want to win these wars but whose sensibilities are disturbed

by their violence. The discourse of fighting a just war against evil, “amoral and ... barbaric” terrorists and insurgents helps in justifying the violence that disturbs the reluctant supporters of these bloody wars (U.S. Army 2007[2006]:52). Cultural knowledge is precisely needed here by the military to know the local needs, networks and vulnerabilities and then to act on and exploit them to defeat local resistance to their occupations “ethically,” while at the same time reducing the insurgents’ violence to their culture. As Crider candidly admits, “the mission of the U.S. military still revolves around imposing our will on the adversary, whether our adversary is a standing conventional army or a group of insurgents hidden among the population” (2009:19–20). In the *Manual* the resort to international law and the use of cultural knowledge are tactics of war geared toward achieving this mission to win. But these “non-violent” tactics and violent interventions have not taken place without affecting the politics and cultures of these places, such as increasing sectarian and tribal tensions in Iraq and Afghanistan and leading to the emergence of new militant groups there such as the Islamic State in Iraq and the Levant (ISIL). The implications of these attempts to rewrite the ethnographic landscapes of these countries will continue long after the end of occupations there.

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Notes

- 1 Golinghorst 2012:1.
- 2 Henceforth referred to as the *Manual*.
- 3 The HTS was designed as a counterinsurgency response in the form of on-the-ground, multipurpose teams composed of military personnel, social scientists and other experts who were supposed to interact with the locals and gain local knowledge and intelligence (González 2008). HTS teams were composed of five to eight persons. In Afghanistan, 14 teams remain active as of August 2013, down from a high of 30 (Gezari 2013).
- 4 The University of Chicago Press version of the *Manual* is a trade edition of *The U.S. Army and Marine Corps Field Manual 3-24*, which continues the U.S. military’s long

tradition of the dissemination of military doctrine in manual form, such as the U.S. Marine Corps' (1940) *Small Wars Manual* (Ansorge 2010; U.S. Army 2007[2006]:xiii).

- 5 Sewall was the director of the program on national security and human rights at the Harvard Kennedy School of Government.
- 6 Of the many elements of the *Manual*, I am selecting two (the use of international law and cultural knowledge) to focus on because both have been publicized to give these wars a humane or, at least, a less violent and more morally justifiable colour. The use of cultural and social scientific knowledge and methods and the recruitment of some social scientists into counterinsurgency programs such as the HTS are also attempts to represent these military campaigns as a softer form of counterinsurgency.
- 7 Examining the relationship between biopower, sovereignty and violence, Mbembe has argued that "the ultimate expression of sovereignty resides ... in the power and capacity to decide who may live and who must die" (2003:11). He calls this form of modern power "necropower."
- 8 See, for example, Walzer 2004.
- 9 Anthropologists have been engaged in debates in international law about human rights and security since the events of 11 September. See Wilson and Mitchell 2003.
- 10 Examining Israel's assault on Gaza in July–August 2014, Weizman (2014) reiterates this point: "Israeli military argues that if residents are warned and they do not evacuate, then they can be considered legitimate collateral damage. Under this interpretation of law, the civilian victims become human shields."
- 11 Christiane Wilke has argued that the category "unlawful enemy combatant" emerged out of the U.S. Supreme Court's decisions regarding the status of enemy (Germans, interned Japanese, Communists) in U.S. law in the mid-20th century. She explains that these cases provided the "terminology and prepare[d] the conceptual stage for the post-9/11 enemy combatant policies: they invent[ed] and multipl[ied] categories of enemies in ambiguous legal territory" (2007:42).
- 12 In an article in *The Guardian*, a former drone operator has cast serious doubts on the accuracy of drone killing strikes (Linebaugh 2013).
- 13 There is an even more ruthless instance of this, as we know that U.S. drone strikes (at least in Pakistan and Afghanistan) explicitly target all males in a location selected for a strike, assuming all of them to automatically be included in the category of unlawful combatant. This is also linked to the U.S. military's deliberate targeting of those males who rush to retrieve bodies after a strike, known as a "double tap" strike tactic. I find this to be no different from the tactic that the so-called terrorists use when they set off a series of bombs to catch those who rush to help the initial victims of an attack.
- 14 The NCA is an independent network of anthropologists that advocates ethical anthropology. The NCA has been active in critically examining the recruitment of social scientists, especially anthropologists, into counterinsurgency campaigns.
- 15 The strategy of arming tribes in Iraq and Afghanistan has resulted in "reinforcing the 'tribal' model imposed upon

from above," and "the hierarchical 'tribe' with highly concentrated leadership may well become a self-fulfilling prophecy" (González 2009c:18). The category of tribe is reinforced in local politics through the exacerbation of divisions—by supporting some and opposing others—along tribal lines. This has resulted in the refining of tribal boundaries and shifts in power relations locally.

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Accumulation by Dispossession in Tourism

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Abstract: Accumulation by dispossession (ABD) is deeply implicated in the broad history of tourism development at Luxor, Egypt. ABD informs a theme of loss found in ethnographic, historical and archival sources in three significant periods of tourism development: the formative period of tourism extending to the mid-18th century, the following mass tourism era and the post-1970s period. Dispossessions including the absence of consent, violent appropriations, monopolistic practices, repeated displacements and the policing of space belie the discourse of tourism as exchange or economic development and reveal differently scaled dimensions of the exercise of power and hierarchy.

Keywords: accumulation by dispossession, tourism, development, displacement, loss

Résumé : L'accumulation par dépossession (APD) est profondément ancrée dans une histoire générale du développement du tourisme à Louxor, en Égypte. L'APD relève du thème de la perte que l'on retrouve dans des sources ethnographiques, historiques et archivistiques durant trois périodes significatives : la période formative du tourisme, qui s'étend jusqu'à la moitié du dix-huitième siècle ; celle du tourisme de masse ; puis, la période qui succède aux années 1970. Des dépossessions découlant de l'absence de consentement, de violentes appropriations, de pratiques monopolistiques, de déplacements répétés et de la réglementation de l'espace démentent le discours du tourisme comme échange ou comme développement économique. De plus, ces dépossessions révèlent des dimensions stratifiées de l'exercice du pouvoir, voire de la hiérarchie.

Mots-clés : accumulation par dépossession, tourisme, développement, déplacement, perte

Introduction

Like many anthropologists, I am most satisfied when my research articulates meaningfully with theory. My ethnographic and historical research on close to two centuries of tourism in a former ancient Egyptian capital, now known as the city of Luxor, duly incorporated what I felt was relevant theories related to tourism, development, colonialism, neoliberalism and governmentality. Yet there remained the nagging feeling that a thread connecting this “whole” intellectual exercise remained incomplete, despite finding its way into the shortened title: “Losing Your Place.” This theme of loss seemed to be echoed in a variety of disparate ethnographic and historical traces that touched on land, livelihood, consent, control, heritage and belonging. The total of losses seemed to me to transcend the theoretical frameworks I deployed that, when dealing with complex human practices and wide time spans, divulge their limitations and adherence to particular domains of analysis. If there can be theory that “fits” better, then it is worth seeking out.

Understanding and relating these multiple losses seems possible through David Harvey's (2003:137–182) theory of accumulation by dispossession based on Karl Marx's concept of primitive accumulation. Accumulation by dispossession refers to a broad range of predatory processes that lead to loss for some and the accumulation of capital (and more) by others. Harvey says that Marx's exploration of the original concept “had the quality of sketch” (146), and Harvey's work purports to paint in the scope and significance of it. As we will see in a review of the theory, Harvey's productive essay on the subject goes so far as to suggest that the relevance of accumulation by dispossession extends beyond the confines of capitalism itself. It is precisely this open utility and broad relevance that I have sought to exploit to better understand the practice of tourism at Luxor and the missing thread of loss.

This article outlines accumulation by dispossession as understood primarily by Harvey. I explore three significant periods of Luxor's tourism history, beginning with the formative period of tourism from the 17th to mid-18th century, when explorers, scholars and wealthy elite tourists made their appearance. This is followed by a consideration of the early mass tourism era ushered in by Thomas Cook on the Nile and at Luxor in the late 18th and early 19th centuries. The third period under the lens includes the past decade and my ethnographic research, as well as significant developments of the tourism industry since the late 1970s. The point is to reveal different dimensions of accumulation somewhat ironically, by gathering or accumulating examples of a variety of processes. At the same time, I suggest that not only is there a diversity of processes worth examining but also that dispossession by accumulation is deeply implicated and involved in the broad history of tourism development at Luxor. It is present whether the discussion is of development, colonialism, capitalism, neo-liberalism, governmentality or even, when considering hospitality, livelihood and sustainability. We can say that even Marx, despite identifying and naming it, missed its true significance, believing it merely birthed a new era of inequality, while we know today there is still no end of it in sight.

Accumulation by Dispossession

Harvey's theory of accumulation by dispossession develops the perspective of Marx and others, such as Rosa Luxemburg, about the fundamental changes to economic systems brought about by capitalism (Harvey 2003; Luxemburg 1968; Marx 1976). One of capitalism's most important dimensions is as an economic system that is driven by the accumulation of capital and the reinvestment of the profits, thereby leading to more accumulation. The most recognized means of accumulation is to create surplus value through gains in productivity or decreases in wages, and through technological advances that also further productivity. The accumulation engine can stall, however, when there are limited profitable reinvestment opportunities. These accumulation crises are common in capitalism, and one method to solve them has been for capital to seek new places or new aspects of life not subject to accumulation and to subject them to this process. In that way, new lands, assets, objects and people can be used for further accumulation (Harvey 2003:137–144).

Therefore, accumulation occurs not only by the creation of surplus value but also through this second process of incorporating aspects of life previously not subject to the squeezing out of surplus value. This very

process of incorporation was the origin of the accumulation process itself and continues to this day. Marx labelled this as "primitive" accumulation, and Harvey renamed it "accumulation by dispossession" to emphasize that it is ubiquitous and not some passed-over stage (137–145). Marx described primitive accumulation processes such as privatization, commodification, displacement of peasants and farmers, changes to legal rights and the incorporation of common property, various financial and debt processes and large processes of appropriation through colonialism and imperialism. Harvey added contemporary examples such as biopiracy, Ponzi schemes, predatory and speculative raiding of companies and their assets, and even house "flipping" (145–152).

Given the predominant focus of Marxist theory on surplus value, Harvey critiques this privileging of the first form of accumulation over the second for its significant bias toward identifying workers as the most important or significant agent of resistance to capitalism and as the agent of its fall. He believes primitive accumulation was discounted or neglected in part because surplus value accumulation was considered somewhat progressive in developing new production forms, and Marx generally viewed capitalism itself as progressive in an evolutionary framework in which it would be superseded by socialism. The antecedent accumulations by dispossession that served to birth capitalism (among them, the enclosure movement and proletarianization) were viewed as unimportant in relation to the new battles over surplus value accumulation that would ultimately result in socialism (163–165). Therefore, Harvey believes that Marxist analysis marginalized primitive accumulation and missed an opportunity to integrate the processes of dispossession into a more sophisticated analysis of capitalism.

At the same time, accumulation by dispossession was helping to power capitalism through its accumulation crises. This occurred significantly through the spread of the political doctrine of neoliberalism from the 1970s onward, encouraged to move out of academia and into practice by British prime minister Margaret Thatcher, among others. Her privatization of social housing, the World Bank's promotion of utility privatization, the near-wholesale privatization of the Argentinian economy and the reformation of Mexico's indigenous collective property rights are all examples from the last several decades of this process of accumulation by dispossession, aided and often actively promoted by states (157–160). Harvey suggests that the movements arising in response to these dispossession processes have, until recently, been seen by a Marxist-influenced left as sharing broad anti-capitalist sentiments but rarely accepted

as effectively able to counter capitalism or to take the seemingly necessary step of attempting to seize the state in some manner (166). In other words, capitalism was being differentially experienced and conceptualized, leading also to the articulation of different forms of struggle with different aims. The Zapatistas are an example given by Harvey of resistance to accumulation by dispossession in the form of a loss of land rights, a very common process through which indigenous peoples have encountered capitalism. Unlike revolutionary workers' movements, the Zapatista response did not seek to capture or overthrow the state but to achieve a recognition of rights, greater degrees of autonomy and the preservation of non-capitalist forms of collective landholding (Harvey 2003:160, 166). For Harvey, giving a proper place to accumulation by dispossession may lead to finding common ground between movements focused on resisting or ending these two forms of capitalist accumulation.

Here, however, my concern is to broaden the analytical applicability of accumulation by dispossession so as to make it useful for analysis of social inequalities beyond capitalism and, particularly, for the study of social inequalities in tourism development. Harvey tentatively suggests that processes of accumulation by dispossession may be understood beyond capitalism by mentioning the role of dispossession in the Marxist/communist revolutionary tradition, which often organized

the equivalent of primitive accumulation in order to implement programmes of modernization in those countries that had not gone through the initiation into capitalist development. This sometimes meant similar levels of appalling violence, as with the forced collectivization of agriculture in the Soviet Union (the elimination of the kulaks) and in China and Eastern Europe. [2003:165]

In other words, dispossession is a productive and destructive activity of changing access to and use of land, resources and other things between people, and it is *not* unique to capitalism or socialism. Dispossession is to take away, to remove rights to something; in socialist revolutions, it often meant taking away private property rights or reducing concentrated holding of land, whereas in capitalism it has often meant dismantling collective ownership. There is loss, which is why it is relevant to my own work. The process of dispossession is one that, if sufficiently broadened theoretically, not only might have relevance to my observations and analyses but also might close the distance between the theory that I am using and the livelihood issues that many of my informants face in Luxor.

Early Explorers and Tourists

Dispossession begins with a basic relationship between parties; with tourism, this relationship is usually one between outsiders coming to see and experience and the people who live there. In the case of Luxor, this relationship began with explorers and scholars who shared an outsider relationship with tourists and prepared the ground for them. This relationship does not necessarily involve capital accumulation, but it does involve accumulation. As Harvey points out, biopiracy is a form of dispossession; dispossession includes situations when people's cultural repertoires are used or appropriated and when outsiders benefit from representations and appropriations for their careers and reputations. This is why informed consent is seen by anthropologists and others as a mechanism (awkward and imperfect though it may be) to acknowledge and mark an exchange between scholars or researchers and the people they are studying. Formalized informed consent is fraught with questions and complexities, such as who is giving consent, how much participants understand the research and how reciprocity and compensation are handled. Even so, it recognizes that the opposite, an absence of consent, generally indicates an absence of any sort of mutual exchange relationship, leading to heightened power inequalities and possibly domination. In this way, I see "tourism," "studying" and "exploring" as appropriations and acts of dispossession, even if minor in many cases.

These forms of dispossession can be observed in the actions of four of Luxor's earliest known European visitors, and how they established relationships and reciprocity. They are the French Jesuit priest Claude Sicard, the first modern explorer to have identified Luxor as ancient Thebes in 1718; the English reverend Richard Pococke and the Danish artist and navy captain Frederick Lewis Norden (both visited in 1737); and the Scot James Bruce of Kinnaird (visited in 1769). All four were explorers and writers. Pococke (1743) wrote about his travels in Europe and the Near East. Norden was sent by the king of Denmark to explore the Nile and was the first European to assemble a comprehensive description of Egypt decades ahead of Napoleon's scholars (Norden 1755). Bruce was attempting to discover the source of the Nile, but his book documents his achievement as a debatable first discoverer only of the Blue Nile branch (Bruce 1790). Of the four explorers, it is only Sicard who seems willing to make the effort of establishing local, usually village-level, consent for his visits (Sicard 1982). He was fluent in Greek, Arabic and other languages and particularly adept at using *firman*s, kinds of licences, permits or passports that functioned

like letters or recommendations and sometimes were formal government-issued documents, often obtained through gift-giving (Barber 1998:521). Travellers would present firmans to the governors of regions and other authority figures to gain a right to pass through or to explore certain areas. Sicard obtained firmans at regional levels but also recognized that it would be wise to establish permission locally, often with the sheikhs of villages. For the most part, Sicard's approach allowed him to visit significant parts of Egypt without conflict, including the Luxor area.

The other three explorers failed to seek consent beyond national or regional officials, leading to conflicts. Pococke, the first of the visitors, neglected to obtain permission of the village of Ba'irat when he entered their territory to see the colossi of Memnon, two giant statues that once fronted an ancient temple (France 1991:5; Greener 1966:74–80). Pococke began to make rubbings of inscriptions on the statues but was soon challenged by villagers: "Some of them attempted to pull me away; but I continued on copying them out, till I had finished them all" (1743:102). Only days later, Norden would have a more difficult encounter with the Ba'irations at the Colossi. He brought an armed exploratory party, and while he composed a drawing of the inscriptions on the giant northern statue, 50 Ba'irations surrounded them and watched Norden with considerable interest. Norden refused their request for *baksheesh* (a gift, a tip, generally for service), and the sheikh of the village soon arrived and asserted that the foreigners should have asked permission. An exchange of intimidations ensued, ending with a threat by Norden that his armed party would kill the sheikh "like a dog" (1757:72). In this difficult position, with guns pointed at him, the sheikh backed down and retreated with his compatriots.

Considering these primordial tourist encounters, we can see that both Norden and Pococke arrived without obtaining consent and clearly saw it as their right to do as they pleased. The broader context was that the Luxor area was known as a particularly lucrative area for buried artifacts, which the inhabitants found or excavated, and the careful study of the writing on the statues could arouse suspicions about potential dispossessions. Yet this was instead a typical activity of another kind of dispossession: explorers intent on raising their own cultural capital and careers as writers and explorers (Bourdieu 1986) and unwilling to entertain even token compensation. This dispossession, although minor in one sense, was nevertheless constructed around a dispossession of autonomy that required the threat of violence. As with the visit of James Bruce, these encounters could end in serious injury. Bruce ignored the advice of

nearby villagers to avoid the Valley of the Kings unless he obtained permission beforehand. When exiting a tomb in the hilly valley, his party heard shouting and saw villagers rolling stones down a hill. Bruce shot his gun at them and later discovered he had wounded several, although his party was unhurt (1790:138). This was all in the name of "to see." But this practice of dispossession could make the careers and reputations of explorers, experts and other authorities, and it was linked with dispossessions (e.g., of national sovereignty) in articulating a right over others. In this way, tourism, like many human practices, can shift between registers of literal, threatened and symbolic violence. Tourists often practised the last through aggressive behaviour and the assumed right to make aesthetic judgments (Harrison 2003:137).

The visit of Vivant Denon in 1799 is a further refinement of "armed," non-consensual tourism, and it ushered in a new phase in which the state would be the firm guarantor of access. Denon was Napoleon's senior representation in the Commission, a group of artists, scholars and scientists sent at Napoleon's request to interpret and record Egypt following the French occupation (France 1991:8–13). The Commission was embedded with French troops involved in hunting down and eliminating former government forces fleeing south on the Nile from Cairo. Denon eagerly awaited any opportunity to visit the Luxor area and the Valley of the Kings. Given the military engagements and the hostility that the French engendered, he had to satisfy his absorption of the sights of Luxor only with quick visits when a military escort was available. On one pass through the area, possibly prompted by Denon's insistence, the army attempted a surprise assault on the Gournowi villagers who occupied the mountain area of burials and regularly resisted the French when they passed through (Denon 1973[1803], vol. 3:47–48). The attack was not a surprise, and while some villagers fled into the desert, others hid in their homes, which often contained subterranean tombs. The French attempted to smoke them out, and a battle ensued; Denon casually mentioned the cruelty used by the troops, though it is quite reasonable to assume it was a massacre. Bloodshed was so common to the expedition that Denon noted the many vultures that followed the army and "fed on what we left behind" (vol. 3:58).

It was near the end of the battle, with most Gournowis subdued and their sheikh held hostage, when an apparently unperturbed Denon seized his opportunity. While the French military was waiting for a ransom for hostages, Denon paid the survivors in the secured area to show him through the tombs. He bragged: "The clink

of money, that universal language, before which all hatred ceases, especially among the Arabs, had procured me friends with the fugitive inhabitants of Kurnu" (vol. 3:55–56). Denon was quite satisfied with his bought souvenirs, including a granite statue and the mummified head of an old woman (vol. 3:88). We do not know, but it is plausible that the Gournowis then used Denon's money to pay the ransoms.

"Hosts and guests" might be a discursive framing of the tourism industry today—it was also the title of the first edited volume on "the anthropology of tourism" (Smith 1977)—but this seems far from the practice of tourism as it was developing at this point in Luxor. A closer look at tourism in this early period reveals that tourism was rarely a consensual or exchange relationship but, rather, a relationship of dispossession and domination enforced by overt or implied violence. Europeans were free to go where they wanted without local permission. It was ordinary Egyptians who faced risks, restrictions and dispossessions. The explorer and Orientalist Edward Lane found it unnecessary for travellers to arm themselves "under the rigorous government of Mohham'mad Al'ee" (2000:220), while a mounted rural police had been instituted by the time a young Florence Nightingale visited as a tourist with family friends in 1850. Not only had the rural police "secured the safety of Europeans," but they also imposed collective punishments for offences:

Five years ago, a *dahabieh* was ordered to meet the governor of India, and was coming down the river. Some Arabs went on board and committed a murder and theft. The village was burnt to the ground and not one living soul spared, not even the child in its mother's arms. If you miss a pin now, the whole village is made responsible for it and the whole village bastinadoed. When we stop at night, the village is answerable for us and men relieve each other on guard the whole night, round our boat. [Nightingale 1987:45]

Thomas Cook and Mass Tourism

Tourist numbers at Luxor and on the Nile were greatly augmented after 1869 because of the development of mass tourism by the English firm Thomas Cook (frequently shortened to Cooks). For 28 years Thomas Cook, the company's founder, had been organizing mainly European excursions and tours; in 1867 he had arranged for 20 thousand English to attend the Paris Exposition Universelle, providing them with hotel coupons that would be honoured by participating hotels in exchange for meals and accommodations—thus establish-

ing the basic arrangement behind the packaged, all-inclusive tours of today (Pudney 1953:157). Cook and his son, John Mason, who was even more involved in developing the Egyptian branch, immediately saw a tourism opportunity in Egypt, and within a few decades, Egyptian travel became the most profitable segment of the company. Cooks' dominance of Middle Eastern tourism by the end of the 1870s meant that more than three-quarters of English and American tourists travelled in their care (Brendon 1991:135). Here I draw attention to four main forms of dispossession that drove this lucrative tourism accumulation, including examples of early privatization, dispossession of livelihoods, a general monopolization of tourism expenditures and dispossession by displacement.

Cooks came to almost completely monopolize Nile tourism through successive waves of the privatization of Nile steamers, the fastest and most convenient form of Nile travel in the late 19th century. To develop mass tourism in Egypt, Cooks first negotiated in 1870 for the company's appointment as the government's agent for passenger travel on the new state postal steamers (Pudney 1953:194), and a year later they obtained control over the interiors to adapt them "to the tastes of Europeans and Americans" (Thomas Cook, *Excursionist*, 6 September 1871:1). This was followed up by a ten-year concession over the Nile steamers and Nile traffic (Thomas Cook and Son 1879), only to be moved up to the full-scale purchase and complete privatization of all steamers in 1882, when Egypt was made an English protectorate and occupied by 12 thousand British troops after the bombardment of Alexandria (Jankowski 2000:91). The British consul effectively ruled Egypt, managed British economic interests and guided the repayment of Egypt's substantial debts to Europe. The financial misfortunes of the Egyptian government gave Cooks the opportunity to purchase all steamers as a package and to conveniently make "payments by annual installments from fees he charged the government for postal, towage and other services," which had previously been outsourced to Cooks (Brendon 1991:137).

While this form of dispossession was a dispossession of the state under financial duress, the second form of dispossession was of livelihood—that of the dragomen, the early tour guides of the Middle East. In 1874, 18 Syrian and Egyptian dragomen wrote to the London *Times* about their grievances with the business practices of Cooks (1874:6): "During the last few years our living has been almost taken from us by English agents monopolizing the conveyance of tourists to this country in large companies." The Dragomen claimed that Cooks' advertisements led to the impression that tourists could

not travel by steamer other than with Cooks, implied by the company's status as "exclusive agents" for obtaining tickets, as well as the fact that, at the Cairo hotels, the steamers were called "Cook's steamers" (at that time they were still owned by the government). There was also a discursive war waged against the dragomen in Cooks' guidebooks and through his tourism publication, the *Excursionist*. Cooks would prevail, drawing away most of the tourism business, while many dragomen lost their livelihood. Those who went to work for Cooks and other tour operators found their burden increased because of the supervision of large parties of tourists, as only two dragomen would be hired for every steamer load of tourists (Thomas Cook and Son 1892).

A third act of dispossession built on the previous dispossessions of privatization and the destruction of independent livelihoods. Alongside the monopolization of tourists visiting Egypt was the general monopolization of the expenditures of the tourists through early forms of vertical integration. The all-inclusive concept Cooks developed allowed for the capture of the most significant expenditures by tourists: the costs of food, transportation and accommodations. Unlike practically all other destinations in its tourism empire, at Luxor, Cooks owned hotels partially or outright, including the Luxor Hotel, the Karnak Hotel and later the Winter Palace (Pudney 1953:197). John Mason Cook oversaw an economic juggernaut along the Nile, funding and benefiting from practically every angle of the tourist consumptive experience. At the end of the 19th century, journalist G.W. Steevens exclaimed: "You will find natives all up the Nile who practically live on him. Those donkeys are subsidized by Cook; that little plot of lettuce is being grown for Cook and so are the fowls ... you may see the natives coming up to him in long lines salaaming and kissing his hand" (1898:9).

The final layer of dispossession to be uncovered in this era is dispossession through outright displacement. As tourism grew, the need to provide convenience, access and appropriate representational spaces rose correspondingly. One of the clearest examples of this process is the displacement of the heart of the town to allow for the excavation of the Luxor Temple, built in 1400 B.C.E. In the succeeding centuries, the temple itself fell into ruins, and Luxor was erected on top of it, often incorporating its ruined columns and walls into homes and other structures. The inhabitation of the temple aroused very strong feelings in many early tourists, who deplored the present interfering with the imaginaries of the past; that it was "difficult to make picturesque" was the typical complaint (Warner 1876[1854]:196). Nightingale felt that Egyptian habita-

tion was virtually a historical crime: "the savages of the Present in the temples of the Past" (1987:77). Not long after Cooks' Luxor Hotel was built across the street from the temple, 40 families were forced to relocate from the site, with the last house removed on the death of its owner in 1888. Although it is not known whether Cooks had any role in this displacement, the company was significantly involved in the redevelopment of Luxor for tourism, so much so that the English Egyptologist Sir E.A. Wallis Budge, also the first author of Cooks' Egypt handbook, credits Cook with bringing "the forces of civilization" to bear on Luxor so that it could be made a pleasing place for European tourists (Budge 1910:580–581). The Luxor Temple relocations were among the first in a series of tourism displacements extending to the present.

Luxor—New Dispossessions since the 1970s

The Luxor area post-millennium is a tourism site of layered dispossessions in time and place, affecting numerous dimensions of people's lives. Although I interviewed a wide range of tourism actors, my ethnographic fieldwork centred on the "informal" guides: Egyptians who hoped to create a livelihood out of meeting tourists in the streets and guiding them to a range of goods, services and experiences. They wait near hotels, on the corniche along the Nile and wherever tourists use public spaces. Some own small shops or felucca sailboats, but most try to gain either guiding income or commissions for bringing business to others. With national chains and international tourism companies like TUI AG and Accor dominating the tourism industry, the guides have rejected formal jobs in the tourism industry that almost always pay below the UN poverty line and involve very long hours, menial work and, not infrequently, workplace harassment. They opt instead for entrepreneurial work because it offers at least the potential of a more substantial living, although in so doing they confront at least three contemporary forces of dispossession threatening their livelihoods. The first is that they find it increasingly difficult to approach tourists, as tourism corporations through their professional guides carefully watch them, while more independent tourists are warned against dealing with them in guidebooks (Gloaguen 2002:241; Humphreys and Jenkins 2002:291). The second process of dispossession occurs when they are regularly cleansed from tourism spaces by policing. Finally, the larger tourism governmentality that is reshaping the city is reinforcing these two processes and even further limiting the spaces in which they can effectively operate.

The control of the millions of tourists by the tourism corporations today continues the dominance over Luxor originally developed by Thomas Cook. The control is executed through vertical integration so that the vast majority of tourists rarely step into public spaces without being supervised and chaperoned by company tour guides. Most hotel beds on land are owned by hotel chains such as Accor (six hotels), Starwood (three hotels), Hilton and Sonesta. The first three companies are among the world's ten largest hotel groups; the last is a smaller American hotel chain focused on Egypt (MKG Consulting 2005). The Egyptian ownership of Pyramisa Isis, the largest hotel in Luxor, is connected to the pre-revolutionary regime of Hosni Mubarak. The same general pattern of dominant ownership is found with the cruise ships, where German-based TUI AG shares ownership of the largest fleet. TUI is a global exemplar of vertical integration, having gone so far as to purchase its own airport (Coventry, England), "one of the most profitable acquisitions to date" (Dennis 2005) to integrate and "deliver its customers' dream holidays from a single source," through its travel agencies, airlines, hundreds of hotels, thousands of tour guides and cruise ships (TUI AG 2005). Some of the informal guides articulated their position in relation to these enormous global operators as *ala bab Allah*, translating as "on the doorstep of God." This phrase communicated a sense of their precarious livelihoods on the margins of the industry. When the guides observed tourists moving under the careful watch of company tour guides, some would complain they were "plastic tourists." When I asked what they meant, they responded, "You cannot eat plastic tourists." Like biopiracy or the enclosure movement, plastic tourism is the dispossession of a resource that could be of widespread benefit.

This modern form of Cooks' vertically integrated dispossession did not emerge automatically. In the post-colonial era, it took shape through the *Infitah*, or "opening," to the West in the 1970s, when the government enacted laws and encouraged investment reforms, as did many developing countries. In Egypt international tourism corporations gained the ability to repatriate profits easily, to import construction and maintenance equipment duty free and to have up to eight-year tax-free "holidays" (World Bank 1979:6). Although there were plenty of hotel beds for tourists and the occupancy rate was low even according to the World Bank (1979:3), both the bank and UNESCO, who produced reports on tourism development for the Egyptian government, nevertheless argued that there was a critical shortage of the right hotel beds—those of international chain hotels (UNESCO 1979:9). The construction and opera-

tion of these hotels was made possible by costly infrastructure spending funded through Egypt's borrowing from the World Bank. With this construction, one pathway of development was closed, and, instead, a high-growth strategy was pursued that increased the volume of tourism. Yet this vertically integrated tourism has brought mostly low-paying jobs, and poverty remains widespread, so much so that a local doctor lamented to me that many working families were increasingly unable even to afford *fuul*, a fava bean dish that often formed the only protein at breakfast. As with most resort or enclave development throughout the global south there has only been the reinforcement of "historical patterns of colonialism and economic dependency" (Lea 1988:10), with a corresponding high "leakage" of tourist expenditures (Brohman 1996; Jaakson 2004).

In conjunction with this all-inclusive and exclusive tourism, the guides face the social cleansing of the very public spaces in which they attempt to engage with non-plastic tourists. In striking up a conversation with tourists, the guides are breaking the law, as speaking with tourists is illegal for those who are not the employee of a large tourism company or who do not have the credentials of a professional tour guide. This is part of a deliberate strategy of reducing the activity of the informal guides, as recommended by the World Bank and UNESCO since the late 1970s. UNESCO (1979:23) proposed policing to eliminate the activities of the informal guides, and another World Bank plan (ADL 1982), which dealt with "visitor management," sought the increasing isolation of the tourist from the resident through augmented enclaving and policing (Mitchell 1995:9). Compounding these issues, heavy security fell on Luxor in the form of increased policing and a military presence in the streets after a deadly terrorist attack in 1997 by a non-local militant Islamic cell at one of the area's temples. This greatly intensified the control of public space. Guides now faced extortion demands from security forces, made with the threat of incarceration or heavy fines, which cut deeply into any tourist income. At other times there are "sweeps" of public spaces, requiring guides' relatives to come down and ransom them from Luxor's police station. In other words, the new security apparatus and policing creates a parallel form of dispossession of the gains the guides do manage to extract from a plastic tourist economy.

In Luxor and in relation to tourism, the ultimate vehicle of dispossession may turn out to be the 1990s Comprehensive Development Plan for Luxor (CDCL), promoted by the UN Development Programme and sponsored by Suzanne Mubarak, the former president's wife (ABT Associates 1999:19). A masterful work of

tourism governmentality, which covers everything from large-scale infrastructure projects to the colours people are allowed paint their houses (ABT Associates 1996), CDCL execution was initially delayed because of the militant Islamic insurgency in the 1990s. It has now been significantly implemented and is in the process of transforming Luxor more radically than it was in the Cookian era. The Gournowi hamlets visited by Denon and attacked by the French army are now virtually depopulated because residents, whose livelihoods depended on their close proximity to the tombs and tourism, have been relocated far away from the nearby tombs to boost visitor numbers. Meanwhile, the CDCL envisioned the transformation of most of central Luxor into an “open-air museum,” making tourism use dominant along most of the Nile corniche and involving the re-creation of the Avenue of the Sphinxes, a ceremonial corridor that once linked the Luxor and Karnak temples. More than a hundred homes, three schools, a hospital and even the local governorate headquarters are in the process of being relocated, effectively erasing any remnants of the original town that existed before the arrival of tourists in the late 19th century, and displacing smaller businesses and restaurants because of soaring land costs. Work has also begun on the construction of an enormous separate tourism enclave south of the city, called El-Toad, centred on a golf course and ringed by high-end hotels and villas. For area residents, the dominant employment option at this enclave will be more low-paying jobs.

Framing these processes as ones of dispossession, in addition to being the effects of capitalism, colonialism, governmentality or neoliberalism, not only relates them in a much larger contextual setting but also demonstrates how dispossession underlies all of them. As well, an analysis of accumulation by dispossession seems to best co-articulate and co-relate an academic theoretical analysis with the thrust of the livelihood struggles faced by the informal guides and other Luxorians. Moreover, this dispossession perspective does not, for example, isolate tourism in paradigms of governmentality or neoliberalism but, rather, points to tourism’s imbrication within a much broader culture of dispossession affecting Egypt, one with very long historical roots that seems to have intensified over the last few decades. In Luxor the forces of dispossession are so pervasive that one informal guide told me he felt it epitomized not only his own story but most of all that of Ali, the “peanut man,” a man a few years older than he. Ali owned a small pushcart on wheels from which he worked the Nile corniche to sell nuts and seeds in paper slips to tourists and Luxorians. Sami said that Ali was quite intelligent and had just

finished college, but, being from a fairly poor family, lacking *wasta*, or “connections,” and not finding work elsewhere, he borrowed money to purchase the cart. Yet, despite a modest and unobtrusive business that could barely support him and his parents, Ali was regularly harassed by the police and pressured for money under the threat of the confiscation of his cart. To Sami, this was an example of a culture of “taking away.” Years later, after the recent Arab Spring movement and a series of revolutions in the region, Ali’s story resonates for me with that of the informal Tunisian fruit seller, Mohamed Bouazizi, who immolated himself on 17 December 2010 to protest the fines, beatings, demands for bribes and confiscations of his cart and equipment (Fahim 2011). The protests following his death ignited the beginning of the Arab Spring in sympathy with the outrage at regimes and the wealthy minority that not only take the best for themselves but also reproduce a culture of dispossession in which not even the meagre livings of street fruit and nut vendors are spared.

Conclusion

In the first tourism era, it could be argued, explorers and tourists engaging in exploration and tourism acquired various forms of cultural capital. The early interactions discussed seem to suggest that this cultural capital accumulation came through a sometimes subtle, other times not so subtle, form of dispossession. The first loss experienced by Egyptians in Luxor was that of the right to give consent, to refuse people if they wished. Hospitality is meaningless if it must always be offered, and any obligation of reciprocal relations or compensation is invalidated by dispossession. Tourism was a crop that others valued and wanted to harvest but also wanted to take for free. As we have seen, the threat of violence and sometimes its practice were frequently present as part of these dispossessions. These were still not capitalist relations of dispossession, unlike in the next era, wherein the powerful presence of Cooks indicates a profit-seeking accumulation venture. Cook’s early vertical integration model meant that his tourism empire was a formidable force, reshaping the livelihoods of the dragomen and countless others in the Luxor area. Its monopolization of Nile tourism in particular, however, rested on dispossessions and massive accumulations that left the playing field nearly empty. It captured most tourists before they set foot in Egypt and drove away its competitors, the dragomen, by essentially monopolizing the main means of transportation and accommodation, the Nile steamers. This privatization and monopolization was carried out in the context of

the dispossession attending an indebted Egypt, not to mention the foreign troops waiting in the wings.

Since then, the losses have become more extensive. The displacements of people from their homes and livelihoods have fanned out from the initial hotspots and have involved a forced outmigration from multiple epicentres of accumulation, attracting national and transnational capital. Homes, schools and government buildings *must* be moved. There is no shortage of reasons as to why land, livelihoods and various resources have to be compromised and sacrificed. Not a few Luxorians see these endless, formal, low-paying tourism jobs as bringing them little prosperity; therefore, they attempt entrepreneurial work in the public spaces. Even these spaces are being taken away or turned into further spaces of dispossession. Those who seek to make their livelihoods through tourism, apart from formalized incorporation into the low-wage workforce, often face being criminalized or simply displaced from the most productive areas. The security apparatus that polices the spaces is divided between those on the street who wish to take a cut of informal income and those in the high offices who are involved in a kind of tourism governance, shaping the city into a hassle-free shopping experience for tourists. Sometimes unfathomable processes of governmentality and dispossession work to remove basic choices such as the colour or location of one's house or building. The area of Luxor is under massive appropriation by tourism through cooperation between the government of Egypt, multilateral institutions and national and transnational tourism corporations.

There are many more dispossessions related to tourism at Luxor that could be included. Among them is the extensive plundering of the archaeological heritage of Egypt by colonial powers, particularly in the first four decades of the 1800s, when Europeans removed from Luxor and Egypt thousands of antiquities that included statues, inscribed blocks, obelisks, mummies, sarcophagi, necklaces, amulets, scarabs, papyri and vases (Greener 1966:128). The massive stone head of Ramses II is in the British Museum, while Luxor's obelisks stand in European capitals, including the Place de la Concorde in Paris. Dispossession is also arguably present in the unequal allocation of resources and infrastructure development. The CDCL development plans reveal that the tourist enclaves are extremely demanding in terms of electricity use, with five-star daily consumption estimated at more than six times resident use, and water use estimated at twice as much (ABT Associates 1999:90, 2000:24–35). The proposal for a second golf course in the baking Saharan sun seems a foolish project

when Egypt will be considered a “water-scarce” country by 2025 with less than a quarter of the amount of water that was available per person in 1955 (Laki 1998:289–290).

While Harvey does point out that accumulation by dispossession is not exclusive to capitalism, he does not significantly develop the overall implications of this concept. Such an expansion would suggest a broader definition; perhaps that accumulation by dispossession is the removal of something, physical or symbolic, in such a way that it significantly changes the relationship between people or groups. I would suggest that this dispossession could be theorized as a form of hierarchical relation, since it requires some level of domination not present in a relation of exchange. David Graeber (2011:109), for example, points out that exchange takes place between relative social equals, while relationships of hierarchy should not be considered exchange as they do not, even if they are justified in these terms. Hierarchy involves relations of power and the ability to dominate others. “Whenever the lines of superiority and inferiority are clearly drawn and accepted by all parties as the framework of a relationship and relations are sufficiently ongoing that we are no longer simply dealing with arbitrary force, then relations will be seen as being regulated by a web of habit or custom” (110). Tourism has emerged as a hierarchical custom that is nevertheless symbolically categorized as a process of exchange (relations of hosts and guests, or as bringing the benefits of economic development). Rarely in the global south is the social field not conditioned by colonialism, post-colonialism and inequalities between tourists and local people. As was demonstrated in the earlier tourism period in which local-outsider relationships were established, relations of exchange and reciprocity were largely rejected, while hierarchy was reproduced by the threat of force.

This exploration of accumulation by dispossession in tourism argues that it is a productive frame through which to view social relations of inequality or hierarchy. I also see it as a frame that helps to decrease somewhat the alienating distance between ethnographic subject and ethnographer created by theorizing. It is with the issue of livelihood that I feel dispossession has one of its strongest connections, since it is when one feels dispossessed of the ability to have a livelihood (a job, meaningful and non-degrading work) that one's very existence feels threatened. Therefore, not only are governmentality, neoliberalism and the production of space most often the means of accomplishing dispossession, but, unlike these concepts, dispossession is an open and self-

descriptive concept relatable to one of the most important human concerns: the possibly of threats to reasonable lives and livelihoods for people no matter the economic or political system in which they currently live.

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In the Shadow of the Razor Wire: Class and Insecurity in Guatemala's Urban Core

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Abstract: Entering the global search for an ever-elusive sense of security, Guatemalan homes are adorned with razor wiring. Modern security paraphernalia today build on the long-standing socially accepted paranoia about outsiders disrupting the sanctity of the home. The country's history of inter-ethnic inequality and political violence now reinforces a particular architectural aesthetic that symbolizes the ways that relationships with outsiders are understood. Yet residential spaces in the city core are not solely a product of underlying cultural and historical influences but also reflect more recent market-oriented neoliberal patterns of consumption and citizenship.

Keywords: neoliberalism, urban, violence, Guatemala, inequality, ethnic identity

Résumé : Attendu la quête globale d'un sentiment de sécurité toujours évanescant, les résidences du centre-ville de Ciudad Guatemala sont entourées de fils barbelés. Tout l'attirail de la sécurité moderne s'appuie aujourd'hui sur une paranoïa socialement acceptée par rapport aux étrangers qui perturberaient la sacralité du chez-soi. L'histoire du pays, en termes d'inégalités ethniques et de violence politique, renforce une esthétique architecturale qui symbolise les façons dont les relations entre les résidents et les étrangers sont perçues. Cependant, les espaces résidentiels ne constituent pas seulement un produit d'influences culturelles et historiques : ils reflètent aussi les plus récentes orientations des schémas néolibéraux de la consommation et de la citoyenneté.

Mots-clés : néolibéralisme, urbain, violence, Ciudad Guatemala, inégalités, identité ethnique



Figure 1: Wires and flowering vines, May 2015. Copyright M. Gabriela Torres.

Introduction

In Guatemala City's oldest residential areas, razor wire has appeared in the wake of the civil war as if to symbolize the new violence of everyday living. At a time when other areas of the city were developing as gated communities or self-policed no-go zones, the residents of Zones 1 and 2 chose to adopt the visible security image of the wall-facade. Entering the global search for an ever-elusive sense of security, Guatemalan homes, businesses and public plazas are adorned with fences, armed guards and different arrangements of razor wiring. Adding to a long-standing socially accepted paranoia about outsiders disrupting the sanctity of the Spanish-American home (Few 2002; Taracena Arriola 1999), the razor wire and other modern security paraphernalia are shaping the landscape of residential areas

in the city core. Fortress homes, razored rooftops and barren sidewalks walled by concrete, metal and a wall of noxious traffic dominate the residential areas remaining in the central core of what *ladino* nation-builders once prized as their *tacita de plata*, or “silver cup,” for its faux renaissance architectural design and minimization of urban waste and visible poverty.

How do the security concerns of individuals work to shape Guatemala City’s core in an age of post-conflict? This study is one answer to Anna Tsing’s (2004) call to understand how neoliberalism expresses itself unevenly in local places. I begin by locating the perspective of the ethnographer as a participant observer in postwar Guatemala City. Then in the next sections I explore how neoliberal ideologies imbued in counter-insurgency and postwar governance strategies, together with structural adjustment policies in Guatemala, as in the Latin American region more generally, encouraged civic conceptions of persons as discernible individuals who would engage in civic life through consumption (Bilbija and Payne 2011; Han 2012; O’Neil and Thomas 2011). Immediately following, the article suggests the breadth of insecurity in the Guatemalan capital city. The bulk of the article focuses on residential facades (their walls and the prolific use of metal enclosures and wiring) as emblematic forms of material culture that have come to embody the complex interaction between cultural and historical spatial practices, global neoliberal conceptions of the self and the insecurity of existing in violent environments. In the sections that explore the practice of consuming security and the making of solid facades in Guatemala I suggest that the very nature of security-seeking spatial arrangements also actively works to entrench neoliberal forms of citizenship. My analysis of security-seeking practices is not exclusively framed as neoliberal in the sections that look at residential facades. It also suggests, as Jeff Maskovsky and Catherine Kingfisher (2008) have earlier, that the reach of neoliberalism is always partial and must always be situated in particular cultural dynamics. Given that security-seeking was oriented during military regimes on pre-existing notions of ethnic and class purity (Nelson 2009), I also argue that consuming security in the postwar period follows the habit of ethnic self-making through exclusion and thus also works to bolster the long-standing and divisive national ethnic and class dynamics.

Being an Ethnographer in Guatemala City

Living for 12 months between 1999 and 2005 on the southern edge of Zone 2, just two blocks from its border with Zone 1, I often wondered why residents continued living in the traffic-, pollution- and crime-plagued centre

of the city instead of moving to the newer and quieter apartments of the wealthier zones where much of their social life was located. Coming from the more regulated urban spaces of the north, I was surprised by the cost of living in an area of such apparent chaos. Though not as expensive as homes in the wealthy Zones 14 or 10, stand-alone residences in Zones 1 and 2 were affordable only to middle- and upper-class Guatemalans.

Life in *el Centro* was dominated by talk of ensuring personal safety. Area crime—including carjackings, armed robberies, pickpocketing and the occasional violent attacks—was a preferred topic of conversation among residents. Safety, my informants often reminded me, rested inside the home. There was general agreement that safety on the street could only be attained by adhering to particular rules: Purses were undesirable for walking on the street. Money needed to be carried in several spots on the body: in a sock, tucked in your bra, in underwear, with a few bills in a change purse for a robbery. To avoid becoming prey to criminals, residents advised being behind the closed doors of one’s home by 7 p.m.—advice that most visitors to my home followed to the minute unless travelling by car. Immediately following the war, the streets were often deserted by 7 p.m., with the exception of special community event evenings, such as Holy Week celebrations. Talking with *desconocidos* (“strangers”) was unequivocally seen as risky.

As a *ladino* woman (understood as self-identifying as ethnically non-indigenous), I walked the streets of Guatemala City and, to my surprise, was often approached on the street by strangers (*ladino* and indigenous alike). Discussions of personal safety were particularly frequent whenever I attempted to use a nearby public park with my infant son. While there were always other children playing in the park, I was often stopped by passersby to suggest that bringing a child there, particularly one that was *tan canchito* (“so blond”), put me and the child at risk of armed robbery and kidnapping. When I persisted in using the park, I began to be counselled on the undesirable company I would be keeping by inhabiting public spaces. As one woman told me, “You never know who is going to be there, it is best that you stay in your home.” The mothers and indigenous caregivers of my child’s playmates commented that it was “strange” or “unusual” (*raro*) to see “people like me” (*gente como Ud.*) on the street. Fear of the street lay in the difficulties in identifying a potential criminal but also in concern about being judged by the company we keep.

I conducted interviews with 30 residents of Zones 1 and 2 and a survey of more than a hundred single-family home facades in Guatemala City’s Zones 1 and 2 be-

tween 1999 and 2005, and I compiled a 40-year residence story of a single home in Zone 1. Interviewees chosen for this study were financially secure enough to purchase homes in the city's outskirts or better-off neighbourhoods but preferred to live in el Centro (downtown). Instead of fleeing to the safety found behind the armed gates of the suburbs, families living in the urban core often chose to deal with insecurity by retaining their homes and blatantly closing their entryways to any type of public scrutiny and access.

In analyzing the results, I asked whether the gates, security firm emblems and wires that adorn residences, as well as the ways residents spoke about their homes and security, reflected a way of life with violence and the constitution of the other and the "self at home"? Was it possible to make links between expressions of security/insecurity on residential buildings and self-making?

State-Sponsored Violence and the Making of a Security Commodity

Barthes' (1972) work was seminal in suggesting the ways that commodities can encode consumer ideologies and identities. In Guatemala, not only security paraphernalia but also security itself has become commodified since the war. The security commodities—walls, metal bars, wires and insignia—that adorn the homes of Guatemala's inner core are explored here as an expression of how middle-class ladinos of the city core live with and incorporate both real and imagined violence in their lives. Thinking of security commodities, I wanted to understand how "insecurity physically shapes your home" (Goldstein 2012:5).

Guatemala's 500-year history of severe inter-ethnic inequality and its history of political violence in the latter part of the 20th century are of relevance to an analysis of the architectural character of its residential streets because they shape how the elites who populate the houses in this essay seek to understand and separate themselves from the "public other," often understood as the indigenous and poor. Pointed analyses of Guatemala's long-standing inter-ethnic conflict are found in revisionist histories (Perrera 1993; Taracena Arriola 1999) and in accounts of current social trends like Angelina Snodgrass Godoy's (2006) analysis of the legacy of inter-ethnic conflict and more recent political violence for Guatemala's social fabric. Guatemala's recent past of state-sponsored violence and its long-standing ethnic insularity have made the establishment of a rigid division from outsiders important not just as a marker that punctuates ethnic identity. Security goods adorning homes betray ladino-specific ideologies used to keep

"outsiders" and "others" outside the imagined safety and separation of private space (Few 2002; Taracena Arriola 1999). Such value-laden commodities are used to construct urban ladino identities of class, ethnicity and difference in post-conflict Guatemala.

The display of consumption choices builds meaning systems, such as those bolstering notions of class and ethnicity (Barthes 1972; McCracken 1988). Grant McCracken demonstrates how the symbolic power of goods can often work to tame what consumers perceive as cultural disorder. For McCracken, goods can work to present a "relatively consistent expression in the face of the disruptive potential of radical social changes" (1988:137). While metal bars, walls and wires do represent an attempt to attain physical security, I argue that the security paraphernalia that adorns Guatemalan homes is much more than this. It is a physical expression of the ways that ladino Guatemalans actively imagine themselves existing in the changing urban space of a post-conflict nation that is experiencing radical social change. Buying security goods and talking about buying security goods were typical practices of life in *la Capital* at the start of the post-conflict period.

Security choices made by urban residents—in addition to their practical crime-deterrent functions—work to "construct notions of risk, threat, danger and generate standard modes of response" (McCracken 1988:139). In the particular case of Guatemala, security choices and discussions about one's own choices and the choices made by others work to reinforce ideologies of consumption-based citizenship and to promote particularly long-entrenched cultural practices that attempt to make ethnic difference visible.

For me, the consumption and display of security goods is a particularly cogent example of the very local ways in which neoliberal technologies of subjectification are working in Guatemala. Neoliberal subjectification relies on self-governance strategies, such as fear, to "recalculate social criteria of citizenship, to remoralize economic action and to redefine spaces in relation to market-driven choices" (Ong 2006:5). Aiwa Ong's work in Asia further demonstrates that the "fortressization of urban space" (5) is a well-worn and global spatial practice, through which moralities that serve a market-centred model of citizenship are internalized. John McMurty (2002) similarly argues that the entrenchment of the neoliberal mindset is attained by corporate interests through the construction of threats against life as a means to coerce compliance. According to McMurty, neoliberalism commands through the creation of ambient terror or universal insecurity. For him, it is the socialization of individuals into lives of terror that

enables the reorientation of moralities understood as cultural values to suit neoliberal agendas.

In the past 30 years, Guatemalans have been actively socialized into lives of terror as participants and victims of a civil war that brought the genocide of Mayan Guatemalans and thousands of other murders. Diane Nelson (2009:xv) accounts for the myriad of ways that Guatemala's civil war transformed notions of self, understandings of the value and mechanics of social relations and the meanings given to mundane everyday practices. She highlights that in postwar Guatemala, "discourses of *engaño*, *babosadas* and *manipulación* (duping, foolishness, manipulation) circulate as common-sense assumptions of how the world works" (xv). The notion of *engaño*—"the sense that the world available to our senses hides another face behind it"—is particularly active in the way that city residents care for the facades of their homes. Purchasing security systems, electrified razor wire, doorbell metal bar enclosures and ornate metal doors becomes a way of securing what lies hidden beyond the reach of the street. Purchasing security was seen by all informants as an apolitical and definite way to deal with the insecurities that faced Guatemala as a whole. In my interviews, I often asked informants whether the municipality or the state was responsible for providing the security that they purchased from private companies. The response was a consistent assertion that political involvement was to be avoided. As one informant put it, buying a security system has a clear and foreseeable outcome, but getting involved in politics is inconclusive and, for him, had been proven to "never end well." Engaging with *la calle* ("the street") was saturated with risks not only to life and property but also to the self that were posed by others' manipulations. Such risk was intensified in the interpersonal realm and, most intensely so, in the realm of politics in postwar Guatemala. As Daniel M. Goldstein reminds us, "the proper neoliberal subject in this security society ... is one of perpetual alertness and individual preparedness, being continually on one's guard against the emergence of any and all possible threats" (2012:14).

Hay se cuida ("you take care") was a regular refrain for me upon exiting homes, particularly when I planned to walk home and not travel by car. When I asked Dora, one of my key informants for this project, about what risks I should keep in mind, she responded, "You never know who you are going to meet up with. There are all types of people in *la calle*." *Una buena puerta*, or "a good door," divided the street from the home, provided safety and minimized the risks to the reputation of those living on the inside, while also reducing the opportunity for interactions where exposure to risks occurs.

Yet the process of "fortressization" in Guatemala cannot be traced solely to neoliberalism or a violence-induced cultural reframing of morality, citizenship and space. Guatemala City's fortified, solid facades have long roots in *ladinos'* sense of ethnic insularity and in middle-class traditions of actively segregating their private spaces from the public view of the streets. Notions of danger and insecurity, as well as modes of response to danger, are strongly mediated in Guatemala by an individual's social class aspiration and ethnic ascription and by a history of segregation.

Violence and Insecurity

Residents of Guatemala City, like many of their counterparts in other large cities and suburbs (Caldeira 2000; Goldstein 2012; Low 2005; Nuttall and Mbembe 2008; Rotker 2002), live in fear of armed assaults and other arbitrary crimes that could end in murder. For most residents, the fear of crimes like armed robbery and the life-threatening violence associated with them is based on very real high and rising national homicide rates and the prevalence of robberies and assaults in the city core.

For the residents of the city core I spoke to, rising homicide rates authenticate the ever-escalating sense of insecurity they feel, an insecurity that, for many, was also as an indication of social and cultural disarray. Despite the inability of homicide rates to provide a real sense of the breadth of violence in the region, the rise and magnitude of homicide rates are staggering. Observatorio Centroamericano Sobre la Violencia (OCAVI 2007) estimated that 5,885 homicides were committed in Guatemala as a whole in 2006. This figure represents an increase in the homicide rate of more than two thousand people compared to the annual average in the previous decade (Centro de Investigaciones Económicas Nacionales [CIEN] 1998). A comparison of homicide rates for 2006 reveals that Guatemala's rate per hundred thousand was 7 times that of the United States and 24 times that of Canada (Statistics Canada 2009; U.S. Department of Justice 2007).

In an in-depth survey of Guatemalan families conducted in December 2004, 42 per cent of respondent families indicated that at least one of their members had been a victim of violent crime in 2004 (POLSEC 2004). Just over 80 per cent of the crimes reported by these families were armed robberies that did not result in physical injury, and 60 per cent of these took place on city streets while individuals engaged in shopping and work-related activities. Violence and insecurity are undoubtedly a tangible threat for residents of the city centre, but stopping here does not allow for an under-

standing of the cultural production that results from violent realities. Thinking about insecurity, Goldstein suggests that to be insecure is to “occupy a habitus of fear and uncertainty that is at once social, psychological and material” (2012:4).

I suggest that individual fortification consumption choices by Guatemala’s middle classes, although responding to a threat of crime, are also enactments of fear used to divide space and society, bolster and segregate elites and draw our gaze away from the political and civil demobilization in the Guatemalan neoliberal post-conflict nation. Pierre Bourdieu (1998:6) suggests that a person’s place in social space emerges through the habitual set of differentiations that consumers can produce. I argue that the practised consumption of security goods, evidenced in Zone 1 and 2 residences, works not just to “provide security” but also to naturalize class and ethnic divisions among people.

Purchasing goods provided residents with a certain sense of control over the disorder they perceived in the urban space. If you bought the right wire, had professionals install the wiring and electrical equipment and contracted a decent security firm, you had “done your part to make yourself safe (*asegurarse*).” Residents agreed that doing your part through consumption was the only way not to be blamed when violence and insecurity reached the inside of your home. When a stray bullet injured a young girl eating dinner with her family inside her home, neighbours remarked that it was not the family’s fault because they had put all that was needed on the home to make themselves safe—a steel door, electrified wiring, well-trained staff. As one man I interviewed (March 2005) commented, “I don’t know what else they could have done to be safe.”

Marketing Security

The constant threat of violence in Guatemalans’ imaginations and in their everyday lived experience is clearly also fuelled by corporate interests that feature in McMurty’s (2002) account of neoliberal social restructuring. As Avery Dickins de Girón (2011) suggests, the rise of the private security industry is indicative of the state’s current inability to provide public security. A growing and powerful private security industry that began during the civil war now relies on crime and violence to expand its business. According to Andrew Cockburn and Leslie Cockburn (1991), today’s Israeli-inspired security agencies build on the reputation of the Israeli-trained counter-insurgency intelligence systems during Guatemala’s civil war. Israeli-inspired security agencies like Sistemas Israelis de Seguridad (Israeli Security Systems), Grupo Galil or Grupo Golán provide

their clients today with metal plaques or plasticized stickers sporting omniscient symbols and metaphors (radar maps, an eye) to add to the image of security presented by the building fronts. Though most security companies operating in Guatemala have expertise beyond the home security system, home security was being provided in Guatemala by more than 143 legally licensed firms in 2008, and these private security firms employed 25,735 people and had a registered arsenal of 24,133 weapons (Anonymous 2009).

Home invasion was a major crime concern for those I interviewed. All interviewees living in single-family homes had contracted one or, in some cases, two different security firms with armed rapid response teams. Residents adamantly understood their consumption of security firms to be a requirement of life in el Centro. As one interviewee summarized, the security firm “es una necesidad” (“it is a need”). The process of selecting security firms for some took into account perceptions of military ability developed during the civil war. One informant would only consider “Israeli” firms (not always Israeli-owned but having an Israeli-sounding name) because he thought the Israelis had been so “important to Guatemala’s military during the conflict.” Another informant sought a security firm that was not managed by a known corrupt ex-military agent, as “contracting a company of this type makes a robbery more likely.” Such individuals, he said, are “motivated by money,” and “many times it is the company itself that robs you.” The concern with ensuring the quality of a security firm is probably a result of the minimal requirements for employment with a security firm in Guatemala: 18 years of age, a sixth-grade education and working knowledge of Spanish (Dickins de Girón 2011:111). References, advice and chastisement from friends were all absolutely essential in the process of shopping for a “good” agency. The process of framing the consumption of security firms as a need that is mediated through relationships of trust has roots both in the social history of violence and ethnic separation and in the spatial arrangements of Guatemala’s municipal space.

Security firms primarily draw their employees from the rural labourers who have migrated to the city in search of well-remunerated employment as rural plantation work has decreased (Dickins de Girón 2011:104). Guards are recruited from departments of the country that are primarily Mayan (113). The ethnic background of the primary respondents was not lost on my informants, who did not trust the “morals” of the men who responded to possible breaches or did “rounds.” Their potential duplicity as thieves disguised as security guards was reminiscent of the many conversations inter-

viewees had with me about the “theft-prone” character of their indigenous housemaids. Both types of workers were allowed in the home, but their “character” was always under surveillance by residents—often judged by their ability to submit to instruction, look smart but not too smart and act *como se debe* (“as one should”). For many residents, the *muchachas*’ (maids’) or guards’ knowledge of the privileges that their employers enjoyed every day was corrupting and drove “the help” to jealousies and thievery. As one informant put it, “Where they come from, they do not have this. They can’t access it.”

Design and Settlement: Zones 1 and 2

Guatemala City mimics the Parisian *arrondissement* urban plan as it radiates in a counter-clockwise spiral over the terrain’s many precipices. Guatemala City’s urban core is physically arranged into 25 zones, or geographical divisions, organized in loose grid of numbered streets and avenues that radiate concentrically from the original 18th-century settlement area. Zone 1, where La Nueva Guatemala de la Asuncion (Guatemala City) was first founded in 1773, is still the site of the city’s oldest residences, churches and commercial districts. Today Zone 1 boasts modern apartment and office buildings built in the latter half of the 20th century, highly concentrated commercial areas and many of the sites of national government. The area still retains residences for Guatemalans representing the breadth of the social class spectrum. Most of these residences are found intermingled with commerce.

Most of the colonial-type buildings in Zone 1 were built or rebuilt after a series of earthquakes destroyed most of Guatemala City between 1917 and 1918 (Almengor and Guillermo 1994). Guatemala City was thus rebuilt to retain not only its colonial building facades but also the mapping of the city’s social hierarchy (42). The central parts of Zone 1 housed middle- and upper-class ladinos, while poorer ladino and indigenous families were pushed to the city’s outskirts. In demographic terms, according to the Asociación para el Avance de las Ciencias Sociales (AVANCSO 2003), the combined area of Zones 1 and 2 has changed in the last half century from housing one-third of the city’s total residents to remaining home to only 8 per cent of city dwellers in 1994. AVANCSO suggests that this demographic change is a factor in an absolute reduction in the total number of Zone 1 and 2 residents (which decreased by approximately 25 thousand during the 1950–94 period) and the extension of the city to outlying and low-income zones of the municipality.

The walled and razored facades of Zones 1 and 2 are but one of many possible ways of managing the threat of urban violence in Guatemala City. Crime statistics show that the bulk of urban violence is not located in Zones 1 and 2 but dispersed throughout the city, with greater intensity in the zones that suffer from the highest rates of poverty. Most of the growth of Guatemala City in the past 30 years has been outside the city’s official municipal boundaries; many gated communities have developed in the municipalities adjoining Guatemala City. Between 1981 and 1995, growth rates for these municipalities have averaged 2 to 5 per cent per year at a time when some areas of the city core experienced population contractions (AVANCSO 2003).

A Solid Facade



Figure 2: Zone 1 faux colonial facade with updates, May 2015. Copyright M. Gabriela Torres.

The most common residential building facade in Zones 1 and 2 is the solid concrete facade with a metal dual-purpose garage and entry door. This home facade hides an inward-facing residence of similar interior design to the colonial-type home discussed below. In terms of intruder deterrence, the solid facade achieves security through occlusion of private space and controlled interaction with the street. When asked about the appearance and security of their homes, residents reported that a solid facade allows residents to feel *seguros* (“secure/sure”).

I suggest that to project an image of a properly protected home, the details—doorbells, electrical metres, metal bars—must be secured behind metal enclosures. Protecting the details with flimsy locks placed upon sturdy wrought iron grates is a statement about the value residents place on their belongings and their

perception of the character of the outsiders who are imagined to loiter in city streets. An attention to security details is, as one woman put it, "*lo que significa vivir en el Centro*" ("the meaning of living downtown").

As with their colonial-type counterparts, almost all entry doors have a system that allows residents to look out of their entry door without needing to open it, thus allowing a resident to inspect the character of those wishing to enter with a simple glance. Informants repeatedly reiterated that you needed to be sure of the character of anyone you let into your home. Most of these homes show security concerns by enclosing electrical metres behind metal bars, and some display stickers that prove they have an installed alarm system or surveillance by a security firm.

The efforts made to secure private property that must be located on the facade of the residence are remarkable since there is little profit and conversely little loss from the theft of such items as doorbells or drainage pipes. Are poor Guatemalans so desperate that stealing a ten-dollar doorbell is worth the risk? Are there organized gangs of electrical metre thieves? Is entry into a home at all probable through a 15- by 15-centimetre rainwater drain? These are questions I asked residents, and I was assured by all that thefts of electrical meters and doorbells were common. While one story of electrical meter theft was related to me, no one I interviewed could remember a doorbell theft. Tales of expensive doorbell failures and replacements, on the other hand, abounded. I was repeatedly assured that even if these items were not removed for profit, leaving them unenclosed made homes vulnerable to intrusion. As one man said, "Who knows, they could stick things in there."

The display of security measures in Guatemala City often overpowers the admittedly real security concerns. Homes are overprotected with redundant security measures that speak more of the image that residents want to give to the public than of the actual security needs of the home. In this part of the urban core it is rare to see signs suggesting the low-technology security options of the past. Guatemala City residents want to display their ability to protect their residences because the spectre of imminent violence and crime resonates with pre-existing and well-worn fears of outsiders repeatedly used by ladinos to assert their ethnically insular approach to living in a multi-ethnic and highly hierarchical nation. Discourses of *decencia* ("decency"), *el buen vecino* ("the good neighbour") and *gente con medios* ("people with access to power") were often used to suggest the difference between those who resided in the good homes and those who trolled the streets (including the *servi-*

dumbre—the maids, workmen and nannies—who worked inside most of the homes I visited).

The threat of crime associated with violence allows middle-class Guatemalans to imagine themselves as part of a new global nation where the protection of private property becomes a paramount concern in a modern professional's self-conception as a neoliberal individual, but it also serves to reinforce notions of ethnic and class difference. This became evident when informants discussed their delinquent neighbours who ostensibly failed in their duties as citizens and "good people" by leaving their homes underprotected. Depending on the informant, an unsuitable level of protection could consist of an inability or unwillingness to contract a security firm, inadequate wiring and metal bars or the permitted entry of undesirable characters into the private space of the home. Given the vulnerability of rooftops, the key to being viewed as a good neighbour was the maintenance of a visibly safe roof. Unsuitable levels of protection were often taken to mean a level of disinterest in the safety of neighbours and came to define the social character and social class standing of the offender. Consuming security was often described as *un deber* ("a duty"), and an inability to finance its costs was often interpreted as a forfeiture of the privilege of residing in a middle-class area (as with the residents of the derelict home in Zone 1 that I discuss below).

Consuming Security and Violence

A resident I knew well received a small inheritance from a relative. Despite having many needs, he promptly invested it in updating the wiring of his home. Up until that point, he had only old glass and spikes, but now he could afford electrified razor wire. On the day the new wiring was installed, a crew of workers was busy remodelling the top edges of the concrete facade as the wiring had to be cemented in. New electrical connections and access to sufficient voltage had to be secured. The electrical connection, as it turned out, resulted in an extra charge that was not covered by the small inheritance. Why, I asked, did he choose to do this update now? To date, his house had never been burglarized. Was there any reason to fear it might happen now? He responded, "To be able to have these things ... well, it gives me peace. It gives me calm. I feel good. I feel respected. I feel secure. I am doing something."

The injury potential of security wire is a powerful and often repeated image of what I describe as "purchased aggression," which is commonly found in Guatemalan residences and businesses. Responding to the vulnerabilities of the solid facade, razor wire is now prevalent as the primary form of rooftop security for



Figure 3: Zone 2 stacked security wiring between neighbours, May 2015. Copyright M. Gabriela Torres.

new and renovated homes throughout Guatemala City. Replacing the insecurities of the chicken wire, metal spike and crushed-glass combinations of the past that might allow for intrusion, razor wire predominates on the urban skyline. Residents told me razor wire is a “more professional” wire that must be installed expertly. In instances where height puts the building at a disadvantage, razor wire loops are strung up and stacked two or three loops high. Often razor wire is found dividing adjoining rooftops. When asked about this, my friend with the new wiring indicated that a neighbour’s poor security could impinge on his ability to have an “impenetrable” or “unbothered” home (“una casa donde nadie se meta”). In such cases, razor wire was erected to create a barrier between neighbours, to show who cared or could afford to care about their safety through wiring. Yes, he had bought that, too, to show his neighbours that he could now afford to safeguard even the roof of his home.

Unlike chicken wire (metal wiring with regular star-shaped spikes) and metal spikes, razor wire threatens injury not only from the sharpness of its stainless blades but also from the unleashing of the precariously contained tension of the touch-sensitive wire loops. In most cases, there is evidence that razor wire was added to existing chicken wire and to the lower and upper ends of razor wire loops. As if this threat were not enough deterrent, electrified wire is sometimes hooked up to razor wire loops to dissuade the intruder brave enough to tackle the tension of the razor wire.

Wiring as a symbol of security is, like the dog, duplicitous. It does double duty as it both stands for the

residents’ power to threaten/injure outsiders and also represents the protection-worthiness of the residents’ home. Following the pattern set by the impenetrability of the solid facade, security wiring adds the threat of violence to uninvited public–private encounters. As its edges glisten in the blue sky, razor wire, often adorned with private security decals, stands as an imposing reminder of the potential violent repercussions of an unauthorized entry. Such consumption choices are influenced by shared ideas of security through ethnic and class insularity, which comes to be practised through a continual surveillance of the moral character of those let inside. The ordering of residential architecture, as with other forms of cultural expression, occurs through the interaction of this historical and cultural heritage, as well as the contemporary social and economic constraints of residents.

Securing a Home

Dora opened the wood square that served as a peephole in response to the loud knocking that had reverberated all the way to the second patio, where she was preparing lunch with the cook. We looked past the metal bars embedded in the century-old wooden door to see that a young man with tools and building materials stood on the sidewalk. “I was sent by Don Juan to fix the bathroom.” Dora closed the square and said to me without responding to the youth, “You always have to see who it is. You never just open the door.” She undid the lock, and the young man struggled through the opening with the load of materials and tools, taking care not to get caught in the quick rebolting of the entry door. We led him past the tiled room that housed the car in the evenings into the main courtyard and to the bathroom door. “You tell me when you are done,” Dora said, as we left the unnamed youth to his tasks. Walking back to the second patio, Dora stopped to remove a dead leaf from a climbing plant on the edge of the patio and whispered to the youngest of her maids, at work mopping the floor, “Ojo” (“keep an eye out”), as she gestured toward the bathroom door with her mouth. Why let the young man in, if she didn’t know him, I asked, as we sat to prep the green beans. “I know Don Juan, and that is his *muchacho*,” she responded, adding, “You have to always know who you are letting in.” Anticipating what she thought might be my next question, she said, “And yes, Gabrielita, this is how it has always been. The safety of the house depends on it. You already know that.”

Even the lowest-technology solutions to middle-class security concerns, such as knowing those who gain entry, suggest the role that spectres of violence play in securing the home. The latent violence within the home of the

family I interviewed extensively was displayed in the continuous surveillance of temporary workers and in mundane items such as a sign firmly lodged at the top right edge of the wooden door that opens the home to the street that announces the presence of a *Perro Malo*, or “Bad Dog.”¹

The dog, the streets and public life were defined as perilous by the family because of the degree of *maldad*, or viciousness, they believed lay at the threshold between the public and the private. For them, violence dominated the public space of the street, making such spaces unsuitable for the interaction of *buena gente/gente decente* (“good/decent people”). The separation from the alterity of the public has deep roots in the life of the residents of Guatemala City, as suggested by the 40-year residence story I compiled of a home in Zone 1.

The residence, a classic example of a colonial-type house with a solid facade, was rebuilt during the architectural renaissance of Guatemala City after heavy damage in the 1917–18 earthquakes. The ladino four-generation extended family chose to organize their space so as to separate themselves from those they viewed and continue to view as “other,” for the entirety of the 40 years they had been residing in el Centro. The family home housed a grandparent, parents and their married children and grandchildren. One live-in house worker resided in the home, and a cook and washer-woman contracted to work only on occasion also resided in the home. The family did the bulk of their socializing in their home, at work or in the homes of friends and family.²

The residence in question had an unusually unkempt outer facade that did not correspond to any disrepair on the inside. The degree of care given to the outer facade of the home indicated the residents’ attitude toward downtown city streets. Inside, two inner courtyards, or *patios*, adorned with tropical plants and flowers, dominate the space. Reinforced doors and windows shut out street life from the inner courtyards and garages and show the family’s adherence to a strict division between private and public space. The division between public and private, the women of the home told me, has always been there. Even in olden times, they said, the now long-dead *abuelita*, or grandmother, spent her days sitting inside and watching the street from behind the iron bars. According to them, she did not go out unless she had to but had many people stop by and talk to her through the bars—although Dora noted that she did not speak to “just anyone” (*cualquiera*).

In newer homes, wrought iron grates, razor wire and chicken wire on roof edges, along with multiple padlocks, also reflect an interest in maintaining distance

and keeping intruders out of the home, as I was often reminded. According to the residents of this home, the iron window bars are original to the home and were meant to dissuade intruders from the outset. Yet, at the same time, these homes structurally allow those inside to *espiar* (“spy” or “look at”) the street without being seen—a function served today by the security camera, which elderly members of the family also relished. Despite the solid facade and the building’s security features, the residents I interviewed reported intrusions on many occasions. Robberies took place when individuals gained access from the rooftops. Access to the rooftops was, ironically, gained by climbing the wrought iron window grating in the windows of other homes.

At the time this home was built, the location of the residence and the residents’ attention to security details were signs of social status (Gellert and Pinto Soria 1990). Today the home continues to signal the residents’ status. Neighbours reflected on the now inadequately secured home, suggesting that the character of the residents was not questionable but that it was a sign that this family’s class status was probably in decline. They had not electrified any of their wires, fixed the concrete encasements or hired a reputable security firm. Inadequate security paraphernalia was actively interpreted by neighbours as an indicator of a lack of disposable income and, more importantly, as the inability of the offending residents to continue to be good neighbours and *buenos ciudadanos* (“good citizens”).

Other Zone 1 colonial-type homes have been extensively retrofitted with electric locks and metal doors. The remaining wood door and metal bar facades of this home show a long-established interest in the sharp separation of the home from the public space of the streets. This architectural and social arrangement could be traced back to the turn-of-the-century neo-colonial revival, colonial roots, Spanish traditions and even Middle Eastern architectural styles. Yet, beyond the syncretic architectural inspiration, this home in Guatemala City’s inner core reflects contemporary individual choices, values and preferences indicative of both the ethnic and class origins of its residents. When I asked why the family had not chosen to electrify their roof wires or hire an expensive security firm, the patriarch responded, “If we continue like this—adding this, adding that—then we’ll end up in a jail.” Probing, I suggested that others could see it as a lack of funds, to which he responded, “Well, yes, probably also that.”

Conclusions

I have suggested that Guatemala’s inner “City of Walls” is shaped by three key cultural and historical dynamics

of spatial import: (1) the long-standing traditions of ethnic segregation laced with aggression and distrust that allowed ladinos to distance themselves from the indigenous majority whom they so often consider as “other”; (2) the legacy of a recent history of urban insecurity, militarization and political violence that habituated urban Guatemalans into framing the street as a site of danger; and (3) the local character given to the influence of neoliberal moralities and forms of being that promote the expression of civic participation through consumption. Yet the residents of the capital city are not simply products of their culture or past. They are actively engaged in their own self-making by consuming and talking through their security negotiations. Through security-seeking acts, city residents become practised in the surveillance of streets, constant surveillance of the character of their neighbours and the persons who perform services inside homes (including security guards and security companies), and self-scrutiny of their own class worth.

Resonating with the ideological and architectural constructs in Teresa P.R. Caldeira’s (2000) *City of Walls*, Setha Low’s (2005) *Behind the Gates* and Ong’s (2006) *Neoliberalism as Exception*, the solid facade in Guatemala becomes a tangible material culture legacy of the global trend in private property protection and fortressing as a favoured form of market-driven neoliberal civic engagement. As elsewhere, in Guatemala local expressions of neoliberal security-seeking rhetoric and security consumption are a result of a complex syncretic process that embraces well-worn practices of othering, together with notions of individual responsibility for citizen security. Security-seeking rhetoric and notions of decencia and el buen vecino, in particular, resolutely rely on pre-existing notions of ethnic and class purity as residents regularly inspect and judge the class and ethnic worth of their neighbours and household workers. In Guatemala the individualization and privatization of neoliberal security draw on and bolster the country’s long-standing and divisive ethnic and class dynamics. While city residents gain security from their investment in walls, metal grates and razor wires, they also feel emplaced into safety by security-seeking practices that allow them to know, judge and display their class and ethnic worth.

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Notes

- 1 The sign is meant only to dissuade outsiders from entering the residence, as the small mutt that lives in the home would have difficulty reaching an intruder’s knees. Interestingly, the sign characterized the dog as a “bad” animal, instead of speaking of a “guard” animal. The animal’s imaginary character is offered as the basis of deterrent.
- 2 They originally sought to live in a colonial-type home because of the belief that Guatemalans of good social stature had to live with what the patriarch of the family called a “decorum” that required distance from where the “other” people lived. It is the privilege of owners, the patriarch accentuated, to decide which “other” people can be given permission to enter the home. Hired domestics and manual labour “help” (*trabajadores*) needed to be chosen carefully as others who could enter the home.

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From Proactive to Complacent Politics: Reproducing Spaces of Inequality in a Bolivian Marketplace

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Abstract: During the early 1970s, a group of small-scale vendors in Challapata, Bolivia, fought for and won the right to sell in the marketplace. In doing so they undermined the power of a local group of elite shopkeepers and built the plaza that has become the centre of the town's marketplace activity. Although the original collective action sought to assert a disadvantaged group's right to gain a livelihood, the inequalities and practices of exclusion that vendors once fought against have been reproduced over the course of a generation. In this article I explore how and why this transition occurred and suggest that the case study provides a cautionary tale about the struggles of marginalized groups.

Keywords: politics of space, marketplace vendors, Bolivia

Résumé : Au début des années 1970, un groupe de petits vendeurs à Challapata, en Bolivie, ont lutté et obtenu le droit de vendre leurs produits sur la place du marché. Ce faisant, ils ont sapé le pouvoir d'un groupe local de commerçants influents et construit la *plaza* qui est devenue le centre des activités du marché de la ville. Bien que l'action collective initiale ait visé à défendre le droit d'un groupe défavorisé à subvenir à ses besoins, les inégalités et les pratiques d'exclusion contre lesquelles ces vendeurs ont alors lutté se sont reproduites au bout d'une génération. Dans cet article, j'explore comment et pourquoi cette transition a eu lieu, et suggère que l'étude de cas fournit une leçon de prudence en ce qui a trait aux luttes des groupes marginalisés.

Mots-clés : politique de l'espace, vendeurs de marché, Bolivie.

Introduction

The politics of public space and its links with marginalized groups and issues of social justice have become a subject of much scholarly attention. Recent collective efforts of anthropologists and geographers, in particular, have emphasized the need to understand the connection between the politics of space and the social, cultural and economic processes that occur within space. While much of this literature is concerned with the outcomes that such politics have for disadvantaged groups, there is a range of approaches, from those that examine how the exclusionary practices of elites further marginalize disadvantaged groups (e.g., Low and Smith 2006) to those that understand the place-based politics of marginalized groups as a means to create and engage in alternative livelihood practices (e.g., Harcourt and Escobar 2005). While conducting research among marketplace vendors in Challapata, Bolivia, I encountered a case that addresses the issues raised by both perspectives. In the early 1970s, a group of small-scale, disadvantaged vendors fought for and won the right to sell in the marketplace. In doing so, they undermined the power of a local group of elite shopkeepers and built the plaza that has become the centre of the town's marketplace activity. Their actions can be interpreted as an example of the livelihood practices suggested by Arturo Escobar, Wendy Harcourt and J.K. Gibson-Graham (Escobar 2008; Escobar and Harcourt 2005; Gibson-Graham 2005, 2006) as offering alternatives to the dominant global capitalist economy. Nonetheless, the inequalities and practices of exclusion that vendors once fought against have been reproduced over the course of a generation. These inequalities and practices now occur among the vendors themselves, demonstrating that the exclusionary practices described by authors such as Setha Low (2006) and Don Mitchell and Lynn A. Staeheli (2006) are not just an elite privilege. Moreover, vendors today seem complacent within this system of

inequality. Rather than fighting for equality, vendors are focused on their individual business affairs.

My concern in this article is with how and why this transition occurred. I begin with an introduction to Challapata, its marketplace and the current politics of vendors. I then relate the story of the construction of Plaza Antofagasta and the politics surrounding its establishment. This is followed by a discussion of the current social and economic processes in the marketplace. I argue that the social and economic processes that emerged from the early struggle of the vendors not only underlie the reproduction of inequalities and practices of exclusion but also limit the vendors' capacity for collective resistance. My case therefore offers a cautionary tale about the struggles of marginalized groups. What may begin as a struggle to assert the rights and livelihood practices of a disadvantaged group can be transformed to reproduce the conditions they once fought against.

Challapata and Selling

Challapata is a commercial town located in the southern Bolivian highlands, 110 kilometres south of the city of Oruro. The town is well known in Bolivia for the large open-air marketplace it hosts each weekend. Although the town's population is about 7 thousand, the marketplace serves over 40 thousand people who live in the rural area, over a hundred kilometres in diameter, surrounding Challapata. Other than the small shops that some people operate within their homes, Challapata's marketplace is the only place to purchase goods in this area. The marketplace is large, with more than four hundred vendors selling a wide range of products that include food, clothing, hardware and other household goods. Most consumers are small-scale farmers who cultivate crops for both subsistence and commercial sale. When farmers have products to sell, they do so through transactions with wholesalers who travel to Challapata from major Bolivian cities, such as Oruro and La Paz. The wholesalers resell these goods in other regions and cities of Bolivia. The products that farmers produce for wholesale trade are those that are best suited for the cool, dry climate of the Bolivian high plain, which lies at 3,700 metres above sea level. Quinoa, the meat of llama and sheep, and cheese are the most important commercial products. Farmers also produce potatoes—largely for subsistence—and farmers with access to land in lower-lying valleys cultivate small amounts of root vegetables for their own consumption. The retail goods sold in Challapata are purchased by vendors in the wholesale markets located in the cities of

Oruro and Potosí. None of these goods is produced for commercial sale in the area served by the marketplace; instead, they are produced elsewhere in Bolivia and in other countries. In short, Challapata's marketplace is the place where goods produced in the area are collected for resale elsewhere in Bolivia, and goods produced outside the area are sold for local household consumption.

My research focused on the lives and work of fruit and vegetable vendors who live in Challapata. I obtained my data through participant observation and interviews I conducted in Challapata from June 1998 to July 1999.¹ While I conversed with and observed and participated in the activities of many vendors, I came to know seven vegetable and six fruit vendors quite well. I helped these vendors with their work and spent many hours with them discussing selling, the marketplace and life in general. Vendors are best described as living in multi-occupational households. Most vendors have access to a small plot of land where they cultivate some crops for their own consumption. As well, they and their spouses are often engaged in other income-earning activities, such as small-scale shopkeeping and, when available, waged work. Nonetheless, vendors consider their principal occupation to be that of selling, and they identify themselves as vendors.² Although the majority of vendors are women, the occupation of selling is not exclusively female; many men regularly sell, and many businesses are jointly operated by spouses.

Vendors do not constitute a homogeneous group. They enter the marketplace with varying access to the different resources needed for selling. Thus, among fruit and vegetable vendors, some sell a small volume of produce; others, a medium volume; and a certain few, a large volume of goods.³ These economic differences have not resulted in class distinctions among vendors. Challapata vendors share several characteristics with petty commodity producers (see Babb 1989). They are self-employed, and the resources on which they rely, including labour, are accessed through their households. Vendors whose income exceeds that required for their basic subsistence will use their extra cash in a variety of ways, such as saving for their children's education, their retirement or even a family vacation. Those vendors who wish to expand the size of their businesses will use some of their extra income to reinvest in their businesses. None of the fruit and vegetable vendors engages in accumulation strategies that one would expect to encounter in a capitalist firm. Instead, vendors are focused on household provisioning.⁴ Moreover, small-scale vendors are not necessarily poorer than vendors who operate larger businesses because their spouses

may have full-time work and their earnings from sales may provide only a small portion of their total household income.

One attribute of vendors that captured my interest was the high prevalence of political complacency.⁵ Vendors expressed no concern for local or national politics. Nor did they seem interested in collectively organizing to improve their working conditions in the marketplace. Moreover, there was almost a complete lack of cooperation, reciprocity and mutual aid among vendors. They would rarely extend a helping hand to a neighbouring vendor, and when they did, it was usually for a sibling or other close family member.⁶ Nonetheless, on a formal basis, vendors are very organized politically. In Challapata there are several vendors' associations, each representing the vendors of a particular product.⁷ Thus, there is an association of fruit vendors, one of vegetable vendors and so on. All these associations are linked together under the local Congress of Vendors' Associations. This congress is the instrument through which associations and, by extension, individual vendors can express their concerns with one another. It is also the means through which vendors express their collective concerns to the Challapata municipal government. The congress is also linked with other congresses of vendors' associations at the national level through its membership in the national association of vendors. Thus, each vendor is linked politically with other vendors both in Challapata and throughout Bolivia. In other words, a highly structured political organization offers the potential for Challapata vendors to be collectively mobilized in the marketplace and in both local and national arenas.⁸

In practice, however, vendors do not express any interest in any type of politics or even in their associations. Most vendors are concerned about their businesses, nothing more. When I first asked vendors whether they had any associations representing their interests, many initially said no. It was only after some probing that they revealed the existence of their associations. This acknowledgment was almost always accompanied by the statement that the associations are not functioning or that they fail to serve any purpose. Indeed, when I asked whether I could attend any of their association meetings, I was told that there were no such meetings. The most prevalent way in which politics are expressed among vendors is through informal, rather than formal, means. Vendors who are not on friendly terms will engage in petty quarrels and bickering over stall space and selling techniques. These disputes are often rooted in competition, and they occur between vendors who operate businesses of a similar size and between those with businesses of different sizes.

Those on friendly terms will gossip about other vendors and about townspeople in general. They also spend equal time discussing a variety of topics, such as their family concerns and the price and supply of fresh produce in wholesale markets. I never heard vendors discuss local or national politics, and their discussions of vendors' associations were always the result of my own prompting. In short, while an organizational framework exists for vendors to become actively involved in marketplace, municipal and national politics, vendors do not express any interest in participating or even in discussing such politics.

Today's complacency has not always been the predominant characteristic of vendor politics. Like vendors studied by other scholars (e.g., Babb 1989; Clark 1988, 1994; Cross 1998; Lazar 2008; Lessinger 1988; Seligmann 1998, 2000; Smart 1988), Challapata vendors have demonstrated strong political organization to protect their rights. For example, before the elimination of price controls across Bolivia in 1985, regulated prices were a constant source of conflict between vendors and government authorities. Vendors have also collectively protested efforts by the municipal government to increase the fees they pay to access their marketplace stalls.⁹ These struggles over price controls and stall fees are best understood as reactive conflicts over policies that impinge on vendors' capacities to earn an income. Yet Challapata vendors once engaged in a far more proactive struggle that entailed their right to sell in the marketplace. This struggle over the construction of what is now the central plaza of marketplace activity represents an important moment in the history of the Challapata marketplace. Not only does this event signify the growth and expansion of the marketplace, it also constitutes a rupture in the hold on power and wealth that certain families once had in Challapata. Nonetheless, the extension of the marketplace to Plaza Antofagasta, the struggle that ensued and the construction of the plaza itself are not publicly discussed events. No one related the story of the construction of this plaza to me until the last few months of my original fieldwork. Once I was aware of the struggle, I began to ask vendors about it. Vendors who had participated in the struggle recalled the event with some detail and much interest. Here I relate this story as it was told to me by vendors involved in the struggle.

The Construction of Plaza Antofagasta

Plaza Antofagasta was built in 1973, but the events that led directly to its construction began in about 1971, one year before General Banzer's almost decade-long military dictatorship. Before the construction of this plaza,

the marketplace was small, and it was located in Challapata's original principal plaza, Plaza 16 de Julio, which lies two blocks east of Plaza Antofagasta. Several wealthy and politically powerful families owned houses and shops on the streets bordering this plaza. On market day, small-scale vendors of agricultural products also sold their wares in the plaza. Pack animals, used to carry goods to and from Challapata, were kept in the area that is now Plaza Antofagasta. By the late 1960s, the number of animals had decreased as trucks and buses became the more frequent modes of transportation.

Vendors said there were two reasons why small-scale vendors began to move their selling locations to Plaza Antofagasta. First, throughout the 1960s, the number of small-scale vendors selling in Plaza 16 de Julio had gradually increased and, by the end of the decade, the plaza was congested with sellers. This growth coincides with several features of Challapata's history. Between 1950 and 1976, the town's population doubled.¹⁰ The 1960s also saw a rise in the importance of commercial farming. As farmers in the immediate area surrounding Challapata reoriented their agricultural practices from subsistence to commercial production, they became more reliant on the town's marketplace for their household needs.¹¹ Moreover, inheritance practices limited the number of people who could farm on a full-time basis.¹² Marketplace selling was considered a good income-earning opportunity for those who could not access enough land to provide for their livelihoods. Second, with Plaza 16 de Julio congested with vendors, new vendors began selling from the streets lining the plaza. Shopkeepers, fearing that these vendors would decrease their sales, were abusive toward these small-scale vendors. Vendors said that shopkeepers would not let them sell near their shops, claiming they made the area dirty. As a result, small-scale vendors slowly began to move their selling location to the area that is now Plaza Antofagasta. Throughout the relocation of small-scale vendors' selling locations, the area that is now Plaza Antofagasta remained an undeveloped area of land.

The movement of small-scale vendors to Plaza Antofagasta created a great deal of concern among the shopkeepers of Plaza 16 de Julio, who were afraid that the majority of marketplace activities would follow the small-scale vendors, resulting in a loss of their sales. Shopkeepers therefore asked the local government to intervene on their behalf. Their request was successful because of their local political power. The marketplace superintendent began to verbally abuse the small-scale vendors selling in what is now Plaza Antofagasta. Vendors were told they could not sell in the area and had to relocate their selling activities back to Plaza 16 de Julio.

Vendors ignored these threats and continued to sell in Plaza Antofagasta. The local government eventually asked the military, which has a base in Challapata, to assist them in their struggle. By this time, the market area in Plaza Antofagasta was well established. The plaza itself, however, had yet to be constructed. In their efforts to move vendors back to Plaza 16 de Julio, vendors said the military used verbal and psychological abuse. Threats were made, and vendors were ordered to sell in Plaza 16 de Julio.

During the struggle to establish Plaza Antofagasta as a marketplace area, vendors began to collectively organize and formed their first union. The establishment of the union occurred just before Banzer's military dictatorship banned all forms of organized labour.¹³ I therefore asked people if they were not afraid to form unions and to engage in a struggle with the military. Everyone I asked responded with "no"; as one vendor stated, "We were not afraid, I was not afraid." Nevertheless, the union was formed with some degree of secrecy.

In 1973 vendors constructed Plaza Antofagasta with their own labour and with materials purchased with their own money.¹⁴ Union leaders negotiated with both the municipal government and the military, and Plaza Antofagasta became officially recognized as a marketplace area. Most of the wealthy families who owned shops in Plaza 16 de Julio have since left Challapata.¹⁵ While the few who remain continue to have a disproportionate hold on wealth and political power in Challapata, it is far less than it was in the past. As well, new families who have accumulated wealth through their marketplace businesses are now included among the wealthiest families in Challapata.

The political mobilization of vendors, their defiance of local elites and municipal authorities and their establishment of a new area of marketplace activity could be understood as an example of what Escobar (2008), Escobar and Harcourt (2005) and Gibson-Graham (2005, 2006) suggest constitutes the efforts of marginalized groups to engage in alternative economic practices. Gibson-Graham (2005:148–150), in particular, celebrate the micro-entrepreneurial activities of low-income groups as a form of anti-capitalist economic practices. Indeed, they list local trading systems, informal markets, self-employment and independent enterprises as some of the economic practices that offer alternatives to a dominant capitalist system (Gibson-Graham 2005:138, 2006:76). In constructing Plaza Antofagasta, vendors established a space in which economic activities could be conducted among more or less equal participants. As I have already noted, vendors today, as well as those in the 1970s, are best described as petty traders involved

in simple commodity circulation. Rather than accumulation, the goal of their trading activities is household provisioning (see Cook 1976). Furthermore, the farmers who constitute the majority of their customers are petty commodity producers who also seek to provision their households. The vendors' union was formed to ensure that more powerful economic players, such as wealthy shopkeepers, could not take away the right of vendors to sell in the marketplace. Yet, today, the inequalities and exclusionary practices that vendors once fought against have re-emerged. Moreover, vendors seem politically complacent about these changes.

What is missing from my portrayal of the events in Challapata is an understanding of the social, political and economic processes that came into play following the construction of Plaza Antofagasta. Challapata's marketplace does not exist in isolation from broader political-economic processes, nor have such processes within the marketplace itself remained static. To understand the transition from proactive to complacent politics and the reproduction of inequality and exclusion, we need to explore some of the political and economic processes that have occurred in the Challapata marketplace. These processes are linked with three features of the Challapata marketplace that underlie the current political complacency of vendors: the absence of formal regulations that impede the ability to sell, the high level of competition among vendors and the manner in which inequalities in economic power among vendors are manifested. Before I explore these features, I discuss some of the changes that occurred in the area surrounding Challapata since the early 1970s.

After the construction of Plaza Antofagasta, the marketplace continued to expand. Today, it encompasses three plazas and the streets that extend beyond these plazas. Because the number of vendors is so much larger, the original union has been divided into numerous associations united under one congress.¹⁶ The duration of the marketplace has also lengthened. Although it is officially, and originally, a Sunday marketplace, the number of market days has increased. In 1999 selling activities began at noon on Saturday and continued until late Sunday afternoon. As well, a small number of vegetable and fruit vendors continued to sell on Monday. By 2006 many vendors of a variety of products were selling on Monday, and a small number of vegetable and fruit vendors continued to sell on Tuesday. The reasons for this expansion include population growth, the further integration of farmers into the cash economy and the lack of opportunities for waged work. Challapata's population has almost doubled since the early 1970s, and the number of rural residents, who constitute the bulk of

vendors' customers, has also increased.¹⁷ Although many of these rural residents are small-scale farmers engaged in largely subsistence production, they are not completely self-sufficient and rely on the marketplace to purchase some necessary goods. Some farmers are best described as commodity producers, and their involvement in commercial farming has intensified since the early 1970s. This is especially so in the agricultural area directly adjacent to Challapata and in the area known as Salinas. The former is an important producer of dairy products, while the latter is well known for quinoa production. In short, population growth and the improved cash incomes of some customers have resulted in a larger customer base for the marketplace.

It cannot be assumed, however, that this situation has directly benefited all vendors. The marketplace serves an area characterized by a lack of basic infrastructure, such as electricity and paved roads; a high incidence of poverty;¹⁸ and limited employment opportunities. Most customers have little cash to spend, which, in turn, limits the income-earning potential associated with selling. Nonetheless, with few opportunities for waged work, marketplace selling is an important source of income for Challapata households. An estimated 60 to 80 per cent of Bolivia's working-age population is employed in the informal economy (Brett 2006). The predominance of this economy in Bolivia is, in part, a result of the country's neoliberal economic policies that were implemented throughout the 1980s and 1990s. These policies included privatization of state-owned enterprises, decreased state funding for social welfare programs and the elimination of price controls. The outcome for most Bolivians has been a reduction in the value of their incomes, decreased employment opportunities and declining support from state welfare agencies. In response, many Bolivians have mobilized their own resources and have sought their livelihoods through self-employment (Gill 2000:3–4).¹⁹ Since Challapata residents have been engaged in commercial activities for decades, the degree to which neoliberalism has shaped their livelihoods is difficult to assess. Nevertheless, waged work in mining and construction had been an important source of income for some Challapateños, and access to this work is now more limited than in the past. Consequently, even more people have entered the marketplace as sellers to earn an income. As I discuss below, this expanding number of sellers trying to make sales to an increasing number of cash-poor customers has transformed the original intent of Plaza Antofagasta to provide a space for small-scale and relatively equal vendors to earn a livelihood.

Reproducing Control, Competition and Inequality

The construction of Plaza Antofagasta signalled the demise of shopkeeper control and power over small-scale vendors. No institution or authoritative group has since assumed this control. Unlike many other marketplaces in Bolivia (e.g., Buechler and Buechler 1977; Buechler 1978; Lazar 2008) and elsewhere in the world (e.g., Babb 1989; Clark 1994; Cross 1998; Davis 1973; Seligmann 2000), the municipal government has limited involvement in marketplace activities. The government does provide an area for the marketplace and a few minimal services such as the bathroom, one water tap and lighting. It also collects the annual and weekend fees that vendors pay for the rights to use their stalls. The municipal government, however, provides no written rules and regulations that monitor selling activities. Nor has the government tried to limit the size of the marketplace. Indeed, the government has good reasons to embrace its growth. Not only are the stall fees paid by vendors an important source of revenue, the marketplace itself is also well known throughout Bolivia, and its expansion underscores the importance of Challapata as an urban centre.

In contrast, vendors' associations do implement some controls over the activities of vendors. Although officially labour unions, the associations share several characteristics with the neighbourhood associations of gated communities and the business improvement district associations discussed respectively by Low (2006) and Mitchell and Staeheli (2006). They regulate, through membership, who sells in the marketplace, allocate stall space, act as a liaison between their membership and the municipal government, mediate disputes among vendors and, for vendors of prepared foods, determine prices.²⁰ To sell a particular product, a vendor must be a member of the association representing the interests of those who sell that product. Hence, a member of the Vegetable Vendors' Association cannot sell meat unless she or he becomes a member of the Meat Vendors' Association. To become a member, the vendor solicits the association for membership. Members then collectively decide whether the vendor can or cannot join.²¹ Once a member, the association provides the vendor with a stall space to which she or he is granted use rights. When negotiating with the municipal government, the associations focus on ensuring that the government interferes as little as possible with vendors' affairs, maintaining the current rate of stall fees and requesting improved services such as more water taps and bathrooms. Many of the regulations governing selling are therefore in the hands of the

vendors themselves, and they were initially implemented to protect their interests. As a result of this internalization of control, there is no tangible source of discontent with an outside group like the municipal government, and there appears to be nothing to protest on a collective basis.

Although the number of customers has increased, so has the number of vendors. In fact, a lack of customers is an important factor that limits vendors' business success. Whenever I pointed out that the number of customers had increased, vendors always countered with "so have the number of vendors." Vendors must compete with one another to make sales, and their ability to do so is not equal. Competition to obtain customers is not manifested through competitive pricing as vendors' retail prices do not differ.²² Instead, their ability to attract customers and make sales is linked with both the size and location of their stalls. Indeed, when I asked vendors what was most important for selling, many said it was access to a suitable stall. Although the number of marketplace days has extended beyond the original one, the bulk of vendors' sales are made on Sunday morning. Each sale must therefore be completed quickly to take advantage of the highest concentration of customers. Vendors rely on the labour of their household members in making their sales during this busy time. In general, the greater the number of people helping with selling, the greater the volume of goods sold. Only four or five people can work comfortably in even the largest stalls, and most stalls can accommodate only two to three people. Stall size thus limits the number of people who can assist a vendor with her or his sales. Stall location also affects access to customers, and those with the best location are close to the centre of marketplace activity—Plaza Antofagasta. Since these were the first stalls to be allocated to vendors after the construction of the plaza, most vendors who have access to them are long-term sellers in Challapata, and, importantly, they or their close kin were the vendors who constructed Plaza Antofagasta. As a result, it is mostly the long-term and large-scale vendors who have access to the better-located stalls in the marketplace. These stalls most likely will remain within the hands of the families of the vendors who now occupy them. Once a vendor has been allocated a stall, she or he has exclusive rights to this stall. When a vendor retires from selling or moves to a new location, the stall can be, and is, passed on to another family member.²³ Consequently, some vendors and their families have been able to monopolize control over some of the largest and best-located stalls. This control gives them a certain advantage in selling,

because their larger and better-located stalls provide a competitive edge.

Some of these same vendors have also gained a certain amount of economic control in the marketplace by selling wholesale quantities to some of the small-scale vendors. Vendors with sufficient funds to increase the size of their retail business encounter two limitations to the expansion of their retail activities: access to customers and access to labour. Vendors who have maximized their use of both resources and who wish to expand their business must do so through non-retail activities. The route that is sometimes taken is wholesale trade. Most fresh-produce vendors travel to Oruro or Potosí each week to purchase their goods in these cities' wholesale markets. Vendors who sell a very small volume of goods may not make this trip because of the cost and time involved. They have the option of buying their products from other retailers in Challapata. The two largest fruit vendors and two of the largest vegetable vendors provide this service. Unlike other Challapata vendors who purchase produce in Oruro and Potosí, these four vendors regularly purchase more produce than they are able to sell in retail amounts. They do so to sell in wholesale quantities to the small number of vendors who do not travel. The profit gained from this wholesale trade is minimal; nonetheless, the degree of control these four vendors obtain over the produce market gives them some leverage in setting retail prices. Because they pay a lower wholesale price and sell a much larger volume than the small-scale vendors to whom they sell, they can set maximum retail prices. This situation means that these retailers/wholesalers can influence the profits earned by other vendors.

In short, the marketplace is now crowded with vendors. Those vendors who once fought for their rights to adequate selling space now covet these rights and pass them on to their family members. As well, a small group of large-scale vendors has been able to gain some economic influence through both the large volume of produce they sell and their wholesale sales to some small-scale vendors. Thus, economic processes have led to the emergence of a small group of vendors who wield a greater amount of economic power within the marketplace. This reproduction of power, however, is not a duplication of the past, and it is here that a sense of community among vendors plays an important role.

Before the construction of Plaza Antofagasta, shopkeepers tried to prohibit small-scale vendors from selling in the marketplace. Today, there are no such barriers, and space for new stalls is still available for new vendors. Nonetheless, the location of this space is not close to

the main areas of marketplace activity. Consequently, although newcomers do have the right to sell once they join a vendors' association, they may find it difficult to sell enough of their stock to earn a profit or even to maintain their businesses. The "community" of vendors in Challapata is in some ways Janus-faced, for, while willing to accept newcomers into the group, it does so as long as they keep their distance. This attribute of inclusion/exclusion is not the only outcome associated with the notion of community. It is also important in masking the differences among vendors.

Today there are no distinctions in social status among the vendors in the Challapata marketplace. Vendors recognize that some of their peers may be richer or poorer than themselves, but they do not see them as socially better or lesser. All are vendors, and all are members of their respective vendors' association. Nor does any one group of vendors have a greater amount of political power than another. All the interests of all vendors are channelled to the municipal government by their associations. Importantly, a small-scale vendor is just as likely as a large-scale vendor to become a member of their respective vendors' association executive. The economic power that some large-scale vendors hold is thus far more discreet than that once held by shopkeepers. Moreover, the relationship between the vendors who sell wholesale and retail and the small-scale vendors to whom they sell is underscored by mutual dependence, which, in turn, ensures that the relationship remains cordial. The former rely on the latter to boost the volume of their sales, and the latter count on the former to conduct their businesses. As a result, large-scale vendors are not threatened by—and perhaps may even welcome—the entry of such small-scale vendors into the marketplace. Small-scale vendors, while they recognize the economic disadvantages of buying in Challapata, appreciate the services provided by vendors who also sell wholesale. Some of these small-scale vendors would not be able to sell without these wholesale services. Furthermore, all the large-scale vendors began their businesses with a much lower volume of sales than they have today. Over time they have been able to accumulate the funds and obtain access to the other resources necessary for their current large volume of sales. They therefore epitomize the success stories that many newcomers to the marketplace may wish to emulate. This symbol of success, which appears achievable by all, was made clear to me on several occasions. One medium-scale fruit vendor, for example, said she wants to become a large-scale vendor like her friend, and she firmly believes that, with time and hard work, she will realize

this goal. Stated succinctly, relations among vendors today, although underscored by competition and, in some instances, economic power of one over another, are also rooted in common interests and models.

In short, the current political complacency of vendors is, in part, the outcome of some of the characteristics and features of the local marketplace that were put into motion with the construction of Plaza Antofagasta. Today there are no local or national government policies that directly regulate vendors' selling activities. Instead, vendors govern themselves. The result is that the common interests shared by vendors have taken a backseat, in their relations among each other, to the competitive aspects of these same relations. This competition is expressed through petty quarrels between individual vendors, which the associations seek to resolve. Vendors do not enter the marketplace as economic equals, and some vendors, because of their well-located stalls and superior access to other resources, are better equipped to compete than others. As well, some large-scale vendors have obtained a certain amount of economic power within the marketplace. These economic differences among vendors, however, are smoothed over by their common membership in vendors' associations and their shared occupation and status as vendors. In other words, social, political and economic processes over time have shaped the original intent of Plaza Antofagasta to serve as a space in which vendors could assert their right to sell. Over the course of a generation, inequalities among vendors have re-emerged. Nevertheless, unlike in the past, there is no overt conflict between relatively powerful and powerless vendors because of both their shared status as vendors and the mechanisms of control having been placed in the hands of the vendors themselves.

The Politics of Space and the Reproduction of Inequalities

The case I have presented here is not unique. Elayne Zorn (2004), for example, documented how *campesinos* of Taquile Island in Peru took control over both tourism on the island and the sale of household-produced textiles. Over time, inequalities among island residents emerged because of differences in access to the resources necessary to engage in tourism and textile production. In both my case and that presented by Zorn, we find economically disadvantaged groups collectively mobilizing to assert their right to gain a livelihood. Their struggles and the practices they sought to implement are similar to those which Escobar (2008), Escobar and Harcourt (2005) and Gibson-Graham (2005, 2006) mention in their discussions of the alternative possibilities embedded within the economic practices of disadvantaged groups.

Yet the long-term outcomes in both cases suggest that we should not be too quick in celebrating such activities. Economic and social processes have resulted in the reproduction of the inequalities both struggles sought to eliminate.

In the case of Challapata, today we encounter a marketplace congested with sellers where a small number of large-scale vendors have gained some economic power. In contrast to the previous generation of vendors, who, facing similar conditions, collectively mobilized to assert their right to sell, vendors today are complacent about the inequalities within the marketplace. In this paper I have argued that this complacency is a result of several features of Challapata's marketplace that are, in turn, the outcome of the struggle to build Plaza Antofagasta. Through the establishment of their associations, vendors as an organized group gained a degree of control over marketplace rules and regulations to protect their interests. Consequently, there is no tangible source of discontent with the municipal government, and from the perspective of most vendors, there appears to be nothing to protest on a collective basis. With nothing to collectively protest, vendors have become focused on the competitive nature of their interrelationships.

I also suggested that vendors' associations have served to mask inequalities among vendors. Unlike in the past, when vendors competed with a group of economically and politically powerful shopkeepers, vendors today compete among their peers. Hence, although vendors recognize that they are economically differentiated, they are all members of their respective vendors' association, and they share the same occupation and social status. Moreover, like the neighbourhood associations of gated communities (Low 2006) and the property owners of business improvement district associations (Mitchell and Staeheli 2006), Challapata vendors, via their associations, dictate who can sell and where they can sell in the marketplace. For newcomers seeking to gain a livelihood through selling, the outcome is a disadvantaged position within the marketplace. Today all these inequalities are made somewhat opaque by vendors' belief both in their common status and in the possibility of success for all. In other words, the notion of community not only conceals inequalities among members but also enforces practices of exclusion.

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Notes

- 1 I returned to Challapata for a very brief visit (about three days in total) in May and July 2006. My analysis is largely based on the data obtained in 1998–99.
- 2 Many recent publications about Bolivia have focused on identity politics and, in particular, the politics associated with indigenous identity (e.g., Albro 2005; Gustafson 2009; Gutiaerrez Aguilar 2014; Postero 2007). Residents of Challapata do not use ethnic or racial designations when using identity labels for themselves or others. Instead, they identify themselves and others with labels associated with occupation and place. Vendors in Challapata refer to themselves as *vendedoras* (vendors) and *Challapateños*, and they refer to their rural neighbours as *campesinos* (farmers).
- 3 Fruit and vegetable vendors' businesses can be grouped by size, from small to large. Small-scale vendors sell less than 1,000 pounds of produce each weekend, medium-scale vendors sell between 1,000 and 4,000 pounds, and large-scale vendors sell over 4,000 pounds. The profits that vendors earn also vary and are dependent on both their profit margins and the volume sold. Some small-scale vendors will earn less than 100 bolivianos each weekend, whereas some large-scale vendors will earn hundreds of bolivianos each weekend. The income of vendors therefore varies along a continuum from low to high.
- 4 I discuss vendors' business goals and the decisions they make elsewhere (Gordon 2009).
- 5 Bolivia has a long, rich history of political protest. During my stay in 1998–99 there were city-wide strikes in La Paz and Oruro, transportation strikes, teacher strikes and numerous roadblocks associated with farmer protests.
- 6 I discuss the social relations associated with selling elsewhere (Gordon 2011).
- 7 Although officially named associations, these are closed-shop unions.
- 8 Vendors are involved in a number of different political relationships. I discuss these relationships in detail elsewhere (Gordon 2011).
- 9 In 1999 vendors paid the municipal government six bolivianos annually and 50 centavos each weekend for access to their stalls. Both fees constitute a very small amount of money. At that time, six bolivianos was the standard price for lunch, and 50 centavos was the price of a small snack.
- 10 According to Bolivian census data, Challapata's population was 1,887 in 1900, 2,329 in 1950, 4,307 in 1976, 6,661 in 1992 (República de Bolivia 1995) and 7,683 in 2001 (República de Bolivia N.d.).
- 11 This transformation from subsistence to commercial production coincides with changes in smallholder agricultural production in other areas of the Bolivian altiplano (Buechler and Buechler 1971; Buechler 1972; Clark 1968; McEwen 1975; Preston 1978; Wennergren and Whitaker 1975).
- 12 In theory, property is passed on through partible inheritance. In practice, one son usually inherits the farm and is able to engage in farming as a principal occupation. Other sons, as well as daughters if they have no spouse, will have access to small plots on the farm where they can cultivate products, usually potatoes, for subsistence.
- 13 All unions were banned by the military dictatorship of General Banzer in 1974 (Dunkerley 1984).
- 14 The plaza is a very large square made of cement.
- 15 Townspeople said that these families had relocated to large cities in Bolivia or left the country altogether.
- 16 According to vendors, there were 10 fruit and 7 vegetable vendors when Plaza Antofagasta was constructed. In 1998–99 there were approximately 35 fruit vendors, 60 vegetable vendors and a total of more than 200 vendors of foodstuffs.
- 17 I do not have 1970 population statistics for the rural area served by the marketplace; however, the rural population did increase from approximately 31,000 in 1992 (República de Bolivia 1995) to 42,000 in 2001 (República de Bolivia no date).
- 18 Based on data obtained from the 1992 census, one government document states that the incidence of poverty among the population of the three provinces, Avaroa, L. Cabrera and S. Pagador, that constitute the area for which Challapata is a commercial centre was 93.5, 96.8 and 91.1 per cent respectively. The same figure for the total population of Bolivia was 70.5 per cent. Infant mortality rates in the three provinces were 145 (province of Avaroa), 130 (province of L. Cabrera) and 115 (province of S. Pagador) per 1,000 births. The infant mortality rate for the total population of Bolivia was 75 per 1,000 births (República de Bolivia 1995).
- 19 See Dunkerley 2007 and Kohl and Farthing 2006 for more recent discussions of Bolivian neoliberalism.
- 20 I use the term *prepared foods* to refer to the cooked meals and snacks that some vendors sell. The association of prepared food vendors employs this price control in order to eliminate price competition. The prices of all other products, except one, are not regulated. The exception is the price of bread, which is regulated by the municipal government. I was told that municipal governments throughout Bolivia control the price of bread.
- 21 I do not know of anyone being denied membership in an association, and I suspect that most solicitations for membership are granted.
- 22 See Gordon 2010 for a detailed analysis of the processes underlying price formation in Challapata.

- 23 Some vendors have increased the size of their stalls via this inheritance practice. Some vendors will also register their children as members of their association. This practice ensures that the children will have access to a stall if they take up the occupation of selling and allows a vendor to increase her or his stall size.

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Power and Violence: The Making of “Modernity,” a Conversation with Malcolm Blincow

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Abstract: Political anthropologist Malcolm Blincow, recipient of a York Award for teaching, developed a reputation for taking seriously the anthropology department's principle of “making knowledge count” (to borrow the title from the edited collection by one of the department's scholars, Peter Harries Jones). My conversation with Malcolm focused specifically on some of the thinking that informs his popular third-year undergraduate course, *Power and Violence: The Making of “Modernity.”* Without recourse to reductionism, Malcolm's own personal and professional history as a political anthropologist may have shaped the specific interests and concerns that are reflected in the development of this course.

Keywords: power, violence, modernity, interview, knowledge, Malcolm Blincow

Résumé : Malcolm Blincow, anthropologue politique et récipiendaire du Prix York pour l'enseignement, s'est forgé une réputation enviable en considérant sérieusement le principe, cher au département d'anthropologie, selon lequel « il faut que la connaissance compte » (on a emprunté ce titre à une collection d'ouvrages dirigée par un enseignant du département, Peter Harries Jones). Ma conversation avec Malcolm porte plus précisément sur une partie de la pensée qui compose son populaire cours de troisième année du premier cycle, « Pouvoir et violence: la création de la “modernité” ». Sans verser dans le réductionnisme, notre conversation révèle comment l'histoire personnelle et professionnelle de Malcolm, en tant qu'anthropologue politique, a formé les intérêts et les préoccupations spécifiques qui apparaissent dans son cours.

Mots-clés : pouvoir, violence, modernité, entrevue, savoir, Malcolm Blincow

Introduction

Malcolm Blincow is known, among other things, for his passion and commitment to teaching and for the general principle of making knowledge count, to which the anthropology department aspires. Among the principles that may be discerned in his teaching is a critique framed by a set of principles that fall variously under the umbrella of concerned scholarship and commitment to social, political and economic justice, broadly conceived. One such course where these broad principles might be discerned is his *Power and Violence: The Making of “Modernity.”* As he describes in his syllabus, the course deals with issues concerning the “massive and unprecedented proliferation and use of organized violence” that is “deeply uneven,” “increasingly globalized” and “normalized.”

On the eve of his retirement from York University, I wanted to interview Malcolm on some of the pedagogical principles, practices and orientations that have come to shape and frame his teaching. But that seemed too broad, and he had little interest in being interviewed. Accordingly, he agreed to have a conversation in which I wanted to focus specifically on the aforementioned course. The conversation took place over a cup of tea at my dining table in the autumn of 2012. He balked at the idea of me using a tape recorder but was persuaded to let me do so. Below is the edited transcript of that conversation. In this conversation, I attempt to get beyond just the course, to also engage with the larger philosophical, political and personal thinking and histories that add up to a larger trajectory of which the course is a very small manifestation.

The Interview

Daniel Yon: Your course brings into focus your interest in past and contemporary forms of violence. As a political anthropologist, you have been consistently interested in the place of violence both in and in relationship to anthropology—that is, how to think about and engage

with questions of violence. May I begin by asking you to elaborate on this disciplinary relationship between violence and anthropology?

Malcolm Blincow: I think as anthropologists what we've got to attend to is the fact that we are always moving back and forth between our own attempts at thinking through what we posit as more or less universally applicable concepts and the attempts of particular groups of people, institutions or social entities of one sort or another to establish their own concepts hegemonically, not just locally but also extra-locally and even, for some, universally. Basically, speaking from the vantage point of a political anthropologist, I guess one can see the state form as in one sense a very initial attempt to try and do that by expanding a political form beyond the arena of the local into a cascading series of spatially dispersed but incorporated entities within a larger political unit of some kind. But then, of course, from that initial state form, there is a move into empires of one sort or another and then ultimately into the kind of empires of modernity (which I think are different than traditional dynastic empires). So, to return to the issue of dominant and local epistemologies of power and violence, I was thinking of attempts by modern state and empire forms to universalize their own locally dominant epistemologies but where they have to do so by incorporating (if not eliminating) the local. But this process is never entirely successful, since the local has its own form of hegemonic or dominant epistemology of power and violence as well.

DY: In one of our conversations, you talked about why anthropology is well placed to get at these questions. Can you speak to how and why the discipline is "well placed"?

MB: I don't think we are best placed, necessarily, to get at the larger ones, the more spatially dispersed attempts at hegemony, the states and empires, the truly universalizing ones. I think particular understanding comes especially from historians, historical sociologists, human geographers, political scientists (the deeply informed ones!) and other social scientists. But what I think we are able to do, because we have this as a much stronger emphasis, is to move between the local and deeper/wider dimensions of time/space. It's because of this necessity in our approach to the world that I think we are well placed to get at these questions. I think it is much, much more difficult for people who are well acquainted with the study of deeper and wider temporal and spatial scales to be able to move into the local. Such practitioners, for example, human geographers who work at the local level do extremely careful, wonderful work; but, as a discipline, I think we are better placed.

You have to be a very particular kind of sociologist or human geographer or historian to be able to get at both elements. So, I think we are much better placed as a discipline in trying to get at those questions. It is not that people in other disciplines can't and don't do it extremely well—sometimes, frankly, far better than anthropologists—it is just that, as a discipline, I think anthropologists are better positioned to be able to try and do that.

DY: What are some of the significant works, or who are some of the significant people, who have been quite influential in your own thinking about these issues?

MB: It is from a lifetime of just reading, reflecting and discussing; often, of course, you get influenced by people who you lose track of but who have been influential at one time or another or who just become part of your own mental and political universe and then forgotten. I think, for me, what's been most important has been particular teachers who moved me into certain perspectives, rather than my reading of particular persons. I think that's been more important for me, so it is not as if I haven't been influenced by particular thinkers, but I see the catalyst as being particular teachers who, through their teaching, have introduced me to particular tracks of reading and thinking. That's also a result of having been in particular kinds of locations at certain moments in time, for example, being in Manchester for graduate work from 1965 on. And it wasn't just my teachers in Manchester but also a group of students I was with then, in the middle of the 1960s, in the midst of the process of decolonization, not completed, especially in Africa but also other parts of the world, and the ongoing imperialist interventions, especially in Vietnam. So, both certain teachers, fellow students (some of whom have remained very good friends), the time and place, it's the combination that was absolutely critical.

DY: Who were these teachers?

MB: Well, at McGill, it was, I would say, basically two. One more, in just a very straightforward way, who taught me a lot of anthropology, in a very neutral sense, but who taught me extremely well. That was Richard Salisbury; he was Marilyn [Silverman]'s PhD supervisor, by the way. But when I had Salisbury, as an undergraduate teacher, he wasn't yet engaged in the James Bay Cree Project, where he certainly became more politically assertive. But the one who really influenced me at McGill, indeed, influenced a whole number of us, including Marilyn, was Peter Gutkind. He was an Africanist who had done his doctoral fieldwork and dissertation on the Ganda Royal household. He was also very politically engaged. Whether or not he was a

Marxist, I don't know, but he certainly was a man of the radical left, totally committed to the national liberation movements in the non-western world, Africa in particular. He was very engaged with his students, whom he expected to be involved in scholarly work but also thoughtful, politically engaged work in the classroom ... and outside of it too! He was very active in that way. He was very important for me as the first who got me to begin to think politically, not just about anthropological issues but more broadly, in a different kind of way than I had ever been used to. So, Peter was very important. He was later shabbily treated by the department at McGill because he was a maverick and somewhat eccentric; somebody who wouldn't tolerate bullshit and nonsense. The McGill department had changed quite a bit, becoming increasingly dominated by a bevy of "Chicago Boys" with a particular version of the rising power of American cultural anthropology worldwide; he was cornered and left isolated and didn't live out a very happy scholarly career there. In fact, the department refused for many years to allow a scholarship to be created in his name. It was only because a couple of graduate students of his finally went to see higher-ups at McGill that they finally got a scholarship set up in his name.

DY: And Manchester followed McGill?

MB: I went there [Manchester] for a number of reasons, including the fact that it was meant to be the most new and interesting department in Britain, though obviously not the most established or reputable. Clearly, the LSE [London School of Economics], Cambridge, Oxford, London and the School of African and Oriental Studies were. But Manchester was seen as doing interesting things and being much more politically engaged, and so, for a number of reasons, I chose to go there, not least the fact that I also got a studentship for two years!

DY: Who in particular at Manchester would have had an impact comparable to Salisbury and Gutkind?

MB: Well, peculiarly, most of the teachers there did not appear to us to be in any way particularly radical, either in what they specifically taught or even, necessarily, in the kind of anthropology that they taught—although, interestingly, several had been members of the CPGB [Communist Party of Great Britain]. On the other hand, there was certainly an undisputed emphasis on the significance of class and of politics as central to any kind of anthropology (whether one's topic was development, religion, kinship or whatever) and on the absolute centrality of long-term, detailed, engaged fieldwork. They were certainly excellent teachers. So I think what happened to me at Manchester was that my teachers—among them, Max Gluckman, Emrys Peters, Martin Southwold, Basil Sansom, Ronald Frankenberg, Peter

Worsley—superbly refined a huge amount of anthropological knowledge and practice for me, especially through the many full departmental seminars we had (these seminars were the real learning crucibles). Manchester's political reputation was, to some degree, still played out in some of the topics that faculty and students chose and the kinds of political orientations they brought to them, but, interestingly, there wasn't as explicit a political commitment in all this as there was when I worked with Peter Gutkind. Not at all. Nevertheless, retrospectively, as I think about it, what was crucial in the Manchester approach was a recognition of the centrality of politics to all anthropological questions, real down-to-earth politics—the politics of power. It's an emphasis that has been sadly neglected in recent anthropology, in spite of—I would say, paradoxically, even because of—the dominance of an appeal to supposedly ubiquitous forms of "power." No, apart from that, I think my more explicit political learning and engagements, both within the discipline and outside it, mainly occurred with my fellow students, about a dozen of us, if one includes the sociologists and anthropologists in that core. We were very diverse, about half from Britain and the other half from Nigeria, Malaysia, India, Latin America, the United States and Canada. So I'd say it was a whole combination of factors: the historical moment, the place, teachers, fellow students—all were catalysts for my own developing stances as an anthropologist.

DY: Your doctoral fieldwork was undertaken in Morocco. I know that your interest is not confined to North Africa, the Mediterranean and the Middle East, but, thinking back, was there anything formative about those days that came to shape the way you think of power, violence and modernity today; or even, the other way around, in the way you might take these concepts that you teach about today to reflect upon what you did then?

MB: Aha, right, yes! I think it is more the latter. I began to see myself as a political anthropologist at Manchester. That's what I was clearly most interested in. In fact, my undergraduate degree at McGill was in anthropology and political science—at that time at McGill, one couldn't do an honours degree in anthropology alone; it had to be combined with another social science discipline. Most people combined anthropology with sociology. I was one of the few who did an alternative to sociology, and I chose political science. I had to declare a joint honours degree for my second year at McGill, so I must have already been interested in some way in politics even before I took a course with Peter Gutkind. What Peter did was to sharpen and deepen

my interest in politics, to see the significance of colonialism and the anti-colonial national liberation struggles and movements of the day and the analytical relevance of a critical analysis to all of this. So politics has been there from quite early on; it just got sharpened in all kinds of ways. And that was true of Manchester as well. So, from my early days, there was an interest in political anthropology, and that's what I chose to do for my research in Morocco. Initially, the topic I chose to research was aroused through a curiosity about a specific issue in the politics of religion: how certain types of religious figures became critical political mediators in local-level conflicts and disputes (in fact, this was a classic Manchester topic). But then, when I got to the field and saw that the issue was not currently as significant as it had been historically, I moved into an interest in the politics of development. In a way, I could hardly avoid this; it was *the* dominant issue in the area I'd originally chosen for my initial study but had to abandon. It also helped that there was some archival and a small but excellent secondary social science literature on the area, as well as current development studies that had been recently conducted by UN agencies as part of a major irrigation/development/land reform project. I decided I wanted to trace out the historical politics of colonial settlement, its ongoing impact in the post-independence period after 1958 and then the subsequent impact of national and international development programs, with a particular emphasis on how all of these impacted the twinned connection between land and labour regimes. So: a study of the changing dynamics of the politics of land and labour as refracted in different historical periods through the conversion of land and labour regimes by new legal instruments, agricultural forms of production and the availability and mobilization of labour. Having started out with an interest in the politics of religion, I abandoned the topic because the specific phenomenon I was interested in in the area I had chosen to do my fieldwork was not as politically significant as it had been in the pre-colonial and early colonial period.

I suppose I could have studied religion as such, but this had never interested me. The other reason I didn't is, quite frankly, that I have a "tin ear" for religion. I had eventually abandoned my own earlier teenage religious beliefs out of boredom. So that was another element, and although theology does interest me as a speculative philosophical system, basically religion just bores me to tears. And, to be honest, an additional reason was that my linguistic competence in Moroccan Arabic was limited. I am not a good linguist, and I think in order to deal with religion well, you have to have a

fluent understanding of the language, and while I had a basic everyday conversational capacity with Moroccan Arabic, I certainly had nothing remotely close to fluency. So I wouldn't say I had any sense of thinking of these larger issues of Islam and "modernity" that are so important today, though it has to be said that a number of key anthropological studies on Morocco from this period certainly were important precursors to that interest today.

DY: But you've come to think a lot about religion in recent years, particularly, for example, with respect to the invasions and occupations of Afghanistan and Iraq, respectively.

MB: Yes. But there I would say that one has to see religion as being what I referred to earlier as one of those local-level epistemologies (sometimes dominant, other times not) that are absolutely fundamental for understanding politics, and especially so when they are made into axes of contestation by dominance-seeking epistemologies of empire, which in the examples you cite, let me say it frankly, is "western empire" and its current auxiliaries. These phenomena wax and wane anyway, so that we have to keep in mind that the role of Islam (or variants of Islam) as a political force waxes and wanes, let alone its variable significance in other aspects of everyday life. To that degree, I think it has to be attended to and understood.

DY: The social and cultural organization of violence, that is, how violence is embedded in everyday social relationships and practices, as well as in specialized institutions, what are you thinking about when ...

MB: Before I take that up, let me go back to the first idea or theme, the one about epistemologies and ontologies. I could have put it more simply, I guess, but in broad brush strokes what I'm saying is that I want students to know how other societies conceptualize the world around them, how people represent the world around them, whether these be through local-level forms of representation or more universal ones or the interface between those two. The emphasis on this first theme essentially derives from the significance of the culture concept ("representation" and the "politics of representation"). But since I also remain steadfastly a social anthropologist, I think the everyday social relationships that people are embedded in are also crucial to socio-cultural life (the emphasis on "practices" from the "culturists" doesn't do the trick here: what is meant by that phrase is almost always the "practices of representation," and that only captures one dimension of all social relationships). In particular, since one of the forms that structure social relationships is social institutions, I especially wanted to get at this aspect because, in

thinking about power and violence, it is crucial to understand how violence gets organized. I wanted to move students' conceptions away from everyday forms of violence—bar fights, hockey games, domestic abuse—partly because those topics are covered in many other social science courses but mainly because, while power and violence are, obviously, often systemic, they are also connected by being systemically organized in specialized institutions. I think that's very important, especially when we think about the modern nation-state and empire.

DY: And you regard the military as a key specialized institution of violence?

MB: Exactly. So I wanted the course to focus, not just on violence per se, as part of the rise of the modern nation-state but, more specifically, as the sociocultural organization through which military force is organized and institutionalized in all sorts of ways. I mean, that's the simplest way in which it gets institutionalized, but you could also think of it getting institutionalized through patriotic appeals, for example, through patriotic pedagogy in the extension of schooling to "the people"—all of which brings one back into the politics of representation, of course, of the first theme's emphasis on epistemologies and ontologies.

DY: You've pre-empted my question regarding the third focus of your course: the increasing incorporation of violence, through the development and use of what you described as "technologies of destruction."

MB: Yes, the first two themes lay the groundwork of culture and social relations in thinking about power and violence. The third theme singles out violence, the overall theme of the course, but emphasizes the particular kind of violence that occurs in the "making of modernity." It's not the fact of violence as such; it is that political violence is organized in a certain way and enacted through certain kinds of technologies of destruction that has been such a key part of the making of the modern and of what it is to continue to be modern—to imagine and live it, to reproduce it. That counter-intuitive insight (counter-intuitive because it is so easy to assume that the modern is characterized by the progressive elimination of violence or, at any rate, its progressive channelling through "the law") was, for me, a political breakthrough, and it occurred very precisely at the time of the First Gulf War of 1990–91, with its explicit doctrine of "shock and awe" that shook me to my political and personal roots. Although I'd never been to Iraq or, for that matter, the Near East, I was surprised by the degree to which I felt this was a personal assault and violation. So it wasn't just about an anthropological and political response. This didn't just come from having

worked in Morocco, although that was part of it, or because of my training and changing political orientation at McGill and Manchester. I think it also very much had to do with the circumstances and experiences of my upbringing in India until the age of 14, in the immediate post-independence period, and a sense that, in some basic way, that emergent world was now still so easily subject to attack. Until that First Gulf War I had basically been teaching political anthropology in a straightforward, conventional kind of way, albeit, since the sub-discipline was growing, I had begun to narrow my focus onto three basic issues—the politics of sexuality, property and violence—which I thought covered the most interesting domains of political anthropology. But with the outbreak of the First Gulf War, I felt that while it was all very well to teach about sexuality and property, the world was being shaped in fundamental ways not only by an appeal to violence but also by an appeal that emphasized its necessity to counteract the ostensible violence of others, to "civilize" others. The hypocrisy of the appeal to modernity as the attempt to transcend political violence—and here political violence was always the violence of and by others—struck me as fundamentally at odds with both the historical record and current reality. Far from modernity having slowly staunched political violence in its ascendance toward "civilization" against the "barbarism" of others, it needed constantly to extend itself and universalize itself through violence—that's what I wanted to try get at.

DY: You do insist on thinking about the relationship between epistemology and ontology and the physical expression and brute force of violence; yet you do insist on this separation, for conceptual and pedagogic purposes. Can you say a bit more about why you insist on this separation?

MB: If you collapse the sheer, brute tangibility and materiality of physical violence into questions and practices of epistemology, then you lose something. If you collapse epistemology into the seemingly straightforward facticity of brute violence, then one also misses something. For me, there is no easy answer, which is why I want to keep culture and social relations/sociality, representation and materiality as our key interrelated concepts. I want to keep them going dialectically, where you can't reduce one to the other but where one informs the other, often awkwardly and with difficulty.

I picked up on epistemic violence from Michael Taussig, from his 1987 book *Shamanism, Colonialism and the Wild Man*. He makes a fundamental use of that concept, and, I must say, I have problems with using it. It took me a month to read the book—I read it enormously slowly and carefully every day—and then it

took me about another two months to write a long, laudatory but also critical review of it. But that effort was key for me in coming to terms with/against postmodernism. It is a stunning, brilliantly written and provocative book. But, for me, Taussig ends up too much on the “epistemic” side of things; for him, the epistemics of violence trump what I call the brute materiality of violence, and that, in the end, to my mind is just a cop-out of sorts and, at times, a dangerously misleading one. It’s a challenge. I don’t know where he drew the concept from, but that’s where I became acquainted with the concept.

DY: I find your insistence on the separation of the cultural and social understandably quite useful. But my sense is that it is the collapsing of the two into each other that makes violence normal and embedded culturally. I’m not sure why you want to be so insistent on the separation of the social from the cultural. Particularly if we are looking at the useful concepts you are giving us here—technologies of destruction, the symbolic representations—it seems to me they are intelligible and more useful if you can think about them together.

MB: The act itself, the event, is always social and cultural; to collapse them together is, in effect, to see them as the same or, even more problematically, to all too casually collapse one into the other and then say that they are the same! I don’t think they are the same, and I think it’s best to wrestle with that fact—difficult, awkward, even incoherent as it is at times—rather than to ignore it or smooth it over. If there is an artillery shell or rocket-propelled grenade that lands in this quarter of Homs, Syria, today, how do we describe that act? It’s about the brute material world and the world of representations. It is both. You may want, for certain purposes at hand, to emphasize one or the other because that is significant, but overall, as a general rule of thumb, I think it is analytically crucial for anthropologists to keep both aspects in mind.

DY: You talked about the patterns of reconciliation and the non-violent traditions. How much of the course is about peace and reconciliation?

MB: There are often dissident, minority traditions, like the Mennonites or Quakers, just to think of the western Christian tradition, or the famous Gandhi-influenced non-violent movement along the Pahstun tribal frontier in the 1920s and 1930s. I think it is important

to talk about them because these ideologies and movements often get ignored or even lost. Or think of the figure of the “conscientious objector,” who emerges out of an ostensibly secular western tradition. So there are all these alternative movements or traditions, and I thought it would be interesting to do a course at some stage on them. Not just on pacifism as an alternative to war but a kind of historical and anthropological inquiry into different kinds of anti-war and anti-political violence traditions, within these local or universal epistemologies. So that was what I was trying to get at as the fourth theme of the course; apart, of course, from various individual and interpersonal forms of reconciliation. By the way, I should say that I did not want to take up the various politically ritualized forms of truth and reconciliation commissions around the world, which, while they might have a political value in providing important strands of information, I view more skeptically as forums for long-term communal political reconciliation.

DY: The theme of violence does seem to have pre-occupied you in recent years. It has, of course, been there in other courses you have developed over the years. What is it about the present that makes this topic so pertinent?

MB: In the broader sense of structural violence—yes, maybe, to use a term that’s used more recently—although I wouldn’t have called it that then. But, in effect, yes; if one thinks about it in terms of the issues of the creation of unequal development, the creation and reproduction of conditions of poverty and so on. But, I think, broadly speaking, what really goaded me was that I felt I had to do something about this stuff on violence. I mean it’s just so horrendous and so acceptable to the mainstream media, and still is. It’s always other peoples’ violence; it’s never ours. There are always excuses provided, and it hasn’t changed. The Assads of the world, the Gaddafis of the world ... never NATO, never “the West.”

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Livelihoods, Value and Knowledge in Contemporary Paraguay

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Abstract: In this article we explore the connections among value, knowledge and livelihoods in contemporary Paraguay. Although the specifics of their livelihood activities differ, the experiences of traditional medicinal plant herbalists (*yuyeros*) in Asunción and rural *campesino* farmers thematically overlap. Both participant groups argue that their cultural and practical knowledge is important to the nation, but that their contributions—both actual and potential—to Paraguayan life and the nation are restricted by policies and practices that ignore and exclude them. Our analysis of the ways *yuyeros* and *campesinos* think about their livelihood activities demonstrates different valuations of certain kinds of knowledge and the implications this has for attempts to make a living.

Keywords: Paraguay, livelihoods, traditional medicine, agriculture, exclusion

Résumé : Nous explorons dans cet article les liens qui existent entre la valeur, le savoir et les moyens de subsistance dans le Paraguay contemporain. Bien que les spécificités de leurs activités de subsistance diffèrent, les expériences des herboristes traditionnels en plantes médicinales à Asunción (*yuyeros*) et celles des fermiers ruraux (*campesinos*) se recoupent thématiquement. Ces deux groupes de participants affirment que leurs savoirs pratiques et culturels sont importants pour la nation, mais que leurs contributions (actuelles et potentielles) à la vie et à la nation paraguayenne sont limitées par des politiques et des pratiques qui les ignorent et les excluent. Notre analyse de la façon dont *yuyeros* et *campesinos* conçoivent leurs activités de subsistance montre que certaines formes de savoir se voient attribuer des valeurs différentes, et met au jour les implications de cette différenciation pour ceux et celles qui tentent de subvenir à leurs besoins.

Mots-clés : Paraguay, moyens de subsistance, médecine traditionnelle, agriculture, exclusion

Introduction

In this article, we present two case studies, one of Urban *yuyeros* (traditional medicinal herbalists) in Asunción and the other of *campesinos* in a small community in the Cordillera Department, to examine the intersections of value, knowledge and livelihoods in contemporary Paraguay. Although the specifics of livelihood activities among urban *yuyeros* and rural farmers are very different, we present these two case studies together to highlight overlapping themes in terms of experiences and perceptions of marginalization within Paraguay. Both groups highlight their cultural and practical knowledge in the form of traditional medicinal and agricultural practices as part of a Paraguayan heritage that is in danger of being lost or minimized. Our article demonstrates how, for *yuyeros* and *campesinos*, livelihood practices intersect with valuations of types of cultural and practical knowledge; we also discuss the messiness and livelihood implications of the ways people may be simultaneously incorporated and excluded within their nations.

We first present some background on Paraguay, focusing on issues of poverty, economic relationships, resource access and ongoing struggles around equity and land. We follow this by introducing our two case studies, exploring issues of making a living among the *yuyeros* and *campesinos* we worked with. Drawing on the everyday experiences and concerns of *yuyeros* and *campesinos*, we then explore notions of valuation, exclusion and the livelihood implications for participants from both groups.

Paraguay is a small, landlocked agrarian country with a population of approximately 6.5 million. The country has experienced numerous economic and political changes since the demise of the Stroessner dictatorship in 1989, including the 1991 development of the Mercosur (Mercado comun del sur) trade agreement between Argentina, Brazil, Paraguay and Uruguay (with Venezuela joining as a full member in 2012). The national poverty

rate has remained high. The country's 2009 household survey found that the national poverty rate was 35 per cent, with those in extreme poverty representing approximately 19 per cent of the population; the poverty rate in rural areas was almost 50 per cent, with 32 per cent in extreme poverty (General de Estadística, Dirección Encuestas y Censos [DGEEC] 2009). Informal labour dominates the country, and approximately 70 per cent of rural and 60 per cent of urban employment is in the informal sector (Bertelsmann Stiftung BTI 2012:14).

Although it is a founding and full member of Mercosur, Paraguay's interests are not necessarily always aligned with those of Brazil and Argentina, the two larger markets in the agreement, and its smaller economy means it is unable to "actively frame the agenda for cooperation with its neighbours" (Bertelsmann Stiftung BTI 2012:27). Close economic ties to Brazil and Argentina also mean that Paraguay's currency and economic stability can be directly affected by economic fluctuations in these two countries (16, 27). Borraz and colleagues (2012) note asymmetries in the distribution of benefits from the Mercosur agreement and found that since its introduction Paraguayan wage labour incomes have suffered in almost all employment sectors. Vázquez-León's (2010) examination of two Paraguayan agricultural cooperatives provides some examples of the asymmetries farmers may experience when engaging with Mercosur trade partners. The organic sugar and banana cooperatives that Vázquez-León analyzes are both in direct competition with Brazil; although sugar is one of the country's larger agricultural products, it accounts for only 1 per cent of the sugar that enters Mercosur (2010:62). Even as states and private enterprises argue for better integration of the trade agreement, they may fail to enforce the agreement's regulations (67). This contributes to risk and dependency, not just for farming cooperatives but also for the country as a whole.

Mercosur partners influence the Paraguayan economy in other ways. Total foreign ownership of Paraguay farms over 1,000 hectares is approximately 23 per cent, with 14 per cent owned by Brazilians (Bertelsmann Stiftung BTI 2012:7). However, in three departments bordering Brazil (Alto Parana, Caaguazú and Canindeyú), foreigners own between 62 and 63 per cent of farms over 1,000 hectares (Galeano 2012:459). The Brazilian government supports the interests of Brazilian farmers in Paraguay (Bertelsmann Stiftung BTI 2012:7), and the exclusion of Paraguayan peasants in these and other departments has been met with limited Paraguayan state action. Moreover, the products of Brazilian-owned

farms may contribute to Brazilian exports rather than to the Paraguayan economy per se (Galeano 2012:464).

The everyday realities of economic inequities and resource access in Paraguay (as elsewhere) unfold in different ways and are related to factors including household size and location, economic strategies and diversification, ownership of land or property, social and political connections, and access to non-material resources like education and infrastructural services. The inequitable distribution of land remains a key factor in the maintenance of poverty in Paraguay. Weisskoff (1992) and Nagel (1999) have discussed earlier land distribution issues and conflicts, and more recent work has examined inequalities in land ownership, land access, and forest conservation tensions (Quintana and Morse 2005), and the ongoing favouring of large-scale, export-oriented agriculture (especially soy) by the Paraguayan state since the mid-1990s (Carter et al. 1996; Galeano 2012; P. Richards 2011). The soy boom has contributed to an "exclusionary and socially problematic" agricultural export boom, which has further limited campesino access to land and farm employment (Carter et al. 1996:57), although, at least in some cases, illegally occupied lands may be redistributed to landless Paraguayans (Hoy.com.py 2014).

Campesino households with access to land, particularly those living in the central region of the country, typically own five hectares or less, and the proximity to Asunción can be key in providing rural households with a "safety valve" for earning off-farm income to maintain the household (Zoomers and Kleinpenning 1996:162–163). Hetherington (2008, 2009) has addressed the complexities of land titling and documentation in Paraguay and the struggles around property rights and notions of private property (see also Nagel 1999) and the way these issues can reinforce poverty and inequality among campesino farmers. Brown and Weisberg (2007), Corporate Europe Observatory (2009) and D. Richards (2010), among others, have discussed the ways that the soy agricultural industry is contributing to landlessness (both actual and functional), displacement, food insecurity and health issues among campesino farmers in the eastern and northwestern parts of the country.

The 21 June 2012 impeachment of President Fernando Lugo¹ and his subsequent removal from office on 22 June, again highlighted some of the ongoing inequities and struggles regarding land reform and land access in Paraguay. Referred to as a coup by many, government officials used a clash between landless peasants and police on 15 June in the northern Canindeyú Department, which resulted in 17 deaths, as a way to

remove President Lugo from office. Despite being pro-poor, President Lugo had been unable to address land reform in a meaningful way, and he had been unable to stop illegal land transfers that benefited the rich, largely because of internal factions and power struggles (see Nickson 2012 for a detailed discussion of the impeachment; see also Bertelsmann Stiftung BTI 2012). Fuentes (2012) notes that by removing President Lugo established political powers in Paraguay began to reverse some of the gains made while he was in power. These include allowing a U.S. oil company to resume oil exploration in the sensitive Chaco region of the country and the approval of transgenic agricultural products, which Lugo had blocked while president. In short, these decisions benefit multinational corporations, large-scale farmers and local elites, while doing nothing to address ongoing and worsening problems of land access and peasant exclusion in Paraguay.

While economic inequities are ongoing in Paraguay, research has demonstrated degrees of poverty and resource exclusion within the nation. Wainerman and colleagues (1980), for example, address the ways in which women's participation in Paraguay's urban and rural economies intersects with traditional gender roles, and Horst (2007) offers a detailed history of the oppression and exclusion of indigenous peoples in Paraguay. It is therefore important to note that in this article we focus on the lives of participants who own or have access to certain material or immaterial resources. They are not the poorest of the poor, but they nevertheless experience barriers to economic security. We now turn to our two case studies.

Yuyeros: "We are in Paraguay, so if you have money you have power"

Our first case study explores the experiences of yuyeros, who argue that knowledge about and use of traditional medicinal plants is part of Paraguayan cultural heritage and everyday health-seeking culture. Despite this, their experiences highlight neglect on the part of decision-makers in the economic sphere, with implications both for vendors' livelihoods and for the maintenance of cultural knowledge.

From June to August 2011, Millman worked with yuyeros in Asunción markets to examine the livelihood implications of selling traditional herbal products. Participant observation and semi-structured interviews were the primary methods of data collection. Observation was carried out in three city markets: Mercado Cuatro, Mercado Abasto and Agroshopping, as well as in other areas throughout the city where yuyeros could be found. Millman spent time with yuyeros and also

purchased plants in various forms to consume in teas. Semi-structured interviews were conducted with 19 market vendors—15 women and 4 men—ranging in age from their early twenties to mid-eighties. Based on those who disclosed their exact ages, the average age of participants was 54, and most participants had multiple children. Here, we focus on the experiences of vendors in two of the markets, Mercado Cuatro and Mercado Abasto, which function throughout the week. These markets are run by market administrations, and, as physical spaces, they are characterized by poor infrastructure, safety issues and concerns about precarious work. Participants involved in the research had worked in Mercado Cuatro for an average of 24 years, and those in Mercado Abasto for an average of 30 years.

Mercado Cuatro is a crowded, bustling market occupying several city blocks in central Asunción. The market is divided into numerous informal sections, and several streets are occupied by the yuyeros. Mercado Abasto is located in the city of San Lorenzo (part of the greater metropolitan area of Gran Asunción) and is significantly smaller than Mercado Cuatro. Vendors of medicinal plants, fruits and vegetables purchase goods at Abasto to resell at Mercado Cuatro. Mercado Abasto's busiest times are in the very early mornings. Most participants worked in the Mercados Cuatro or Abasto six or seven days per week, opening shops and stalls in the early mornings, and remaining in the markets until the late afternoon or early evening. Although this is not technically allowed by market administrations, some yuyeros live in Mercado Cuatro throughout the week.

The medicinal plants sold in the markets and on the streets of Asunción can be purchased as fresh or dried leaves, powders, balms and capsules but are most often consumed fresh or dried as hot or cold teas (*maté* or *tereré*). Drinking *maté* and *tereré* is part of the daily routine for most Asunción residents. Medicinal plants and herbs used in *maté* and *tereré* may be incorporated for taste but also are believed to promote daily health by staving off problems such as headaches and gastrointestinal illnesses. The numerous small stalls—usually a small table covered with fresh plants such as *manzanilla* (chamomile), *menta'i* (*Mentha piperita*) and *boldo* (*Peumus boldus*)—at street corners throughout Asunción speak to the popularity of incorporating these remedies into daily life; people stop at these stalls throughout the day to get plants added to their *maté* or *tereré*.

Some remedies are prepackaged combinations, but individual plants are believed to have medicinal properties that treat a range of illnesses, from coughs or colds to cancer and diabetes. Others are used for fertility or to treat certain cultural illnesses such as *frialidad*—a

culture-bound syndrome pertaining to problems of the female reproductive system (Flanagan 2012:134)—or *susto*—another culture-bound illness involving various general symptoms stemming from a frightening event (Bourbonnais-Spear et al. 2007:380). Many remedies are considered as treatments of “women’s problems” such as *frialdad*, and as methods of contraception or as *abortivos* (Arenas and Moreno Azorero 1977). Participants frequently discussed how women are often more comfortable consulting female *yuyeras* about these problems than treating them with pharmaceuticals. Paraguayan women’s use of medicinal plants for contraception has been documented by Bull and Melian (1998:50), who conclude that, despite scientifically questionable efficacy, Paraguayan women are more familiar overall with these plants than with any other form of family planning and therefore tend to prefer these traditional methods.

As with the plant preparations, *yuyeros* in the markets of Asunción are incredibly diverse. Some occupy indoor stores containing a large variety of plants in various forms. These businesses may have established their own brand names and have the resources to pay for packaging materials with their brand printed on the front. There are usually several people, often family, working at these larger stores. At the other end of the spectrum are businesses consisting of only one individual who offers a small choice of fresh or dried plants laid out across a blanket on the sidewalk and who may not always be found in the same location each day. In between these two extremes lie a range of different types of businesses; some occupy one or two carts containing fresh or dried plants and, occasionally, prepackaged powders, balms or liquids, while others are based in smaller indoor stores with a large variety of dried plants only.

Participants also differed in their knowledge of the plants. While many learned about the plants and how they are used from their parents or grandparents, some only sell the plants and know little about their uses. As a result, while some feel equipped to advise or prescribe certain remedies, others simply supply specific products that customers know about and are looking for. Vendors therefore do not uniformly consider themselves to be medical practitioners. However, central to vendors’ sense of value in their professions is their direct connection to and knowledge about Paraguay’s indigenous tradition of medicinal plant use.

Figueredo (1997) and Jiménez (2009) both highlight the historical indigenous heritage of medicinal plant knowledge in Paraguay and these plants’ use in natural remedies (see also Arenas and Moreno Azorero 1977). Figueredo (1997:1) credits the Guarani with establishing

the knowledge of local plant properties, uses and potencies that serve as the foundation for contemporary medicinal plant knowledge and therapy in both urban and rural households in Paraguay. Jiménez (2009:11) notes that the infusions used on a daily basis in *maté* and *tereré* have been passed down through the oral traditions of the Guarani; Arenas and Kamienkowski (2013) have worked with indigenous groups in the Gran Chaco, gathering ethnobotanical data on specific plant species.

When discussing the cultural importance of the products they sell, *yuyeros* positioned themselves as central to the everyday expression and enactment of Paraguayan identity, thus connecting themselves to Paraguay’s indigenous Guarani heritage. Because medicinal plant remedies can be traced back to their use by the Guarani indigenous peoples, participants argued that taking medicinal plant remedies to treat a vast array of illnesses is an integral part of being Paraguayan and of maintaining Paraguayan heritage and tradition. Most participants connected to this long oral tradition personally, which they had learned from family members, usually mothers, aunts or grandmothers. One 81-year-old participant recounted very emotionally how his Guarani mother taught him the medicinal plant knowledge that, as an adult, he was then able to use to heal himself of a serious illness. Of course, connecting traditional medicine and cultural heritage is not limited to Paraguayan traditional medicine; for example, Abraham (2009:68) points out that indigenous medicinal frameworks such as Ayurveda provide individuals with a “cultural template,” including a health culture, rather than simply a method of treating illness. *Yuyeros* highlighted cultural heritage and traditional knowledge in several ways:

Identity is very important with the plants ... It is important because all the people know about the power of the plants and it’s the only option. One day, other medicines will end and the better option is with the plants. [Woman, 61, at Mercado Cuatro]

Tradition is important. If you are Paraguayan and don’t know about the medicinal plants it’s an impossible situation. All Paraguayans know about them ... It’s an authentic tradition and so many people want to know about it. [Woman, 60, at Mercado Cuatro]

If you want to know what is *poho ñana* [medicinal plants] you must talk to someone who has studied Paraguayan culture, because it is a tradition. [Elderly woman at Mercado Cuatro]

In addition, *yuyeros* consistently emphasized that medicinal plants are an integral part of Paraguayan culture; they argue that people in every age group and

socio-economic stratum use these medicines in everyday and ritual ways.² For example, the preparation of particular mixtures was part of certain traditional days, such as drinking *karrulin* on the first of August to reinforce strength and health for a month that is usually agriculturally strenuous.

The majority of participants do not grow their own plants; rather, the plants are picked in the countryside and brought into the city. Continued access to plants from the countryside is key to both the maintenance of livelihoods and the preservation of traditional knowledge as the foundation of this livelihood. Some plants are purchased from farmers who grow them on small plots of land specifically for the traditional medicine market; others are gathered from wild lands, either forested or a *ñu*, a valley or a space without trees where the plants naturally grow. While many were concerned with the preservation of traditional knowledge, others were not overly concerned about access to these plants, believing that they are abundant in wild or agricultural spaces outside of the city. Yet some agricultural sciences faculty at the Universidad Nacional de Asunción have serious concerns about the biodiversity of medicinal plants;³ one explained that many medicinal plants are “pulled out by the roots” and cannot grow back (see Basualdo et al. 1991, 1995 for descriptions of some of the underground organs of plants sold as medicinal remedies in Mercado Cuatro). Of the 13 species of plants that Basualdo and colleagues (1991) collected from medicinal plant vendors in Mercado Cuatro, only one was cultivated, with the remainder growing in the wild. Another Universidad Nacional de Asunción faculty member reiterated that the primary method of obtaining medicinal plants—picking them in the wild—is an unsustainable practice at the rate they are currently being harvested. According to Bratschi (2013), some members of the Swiss Red Cross have similar concerns. This organization has been supporting Paraguayan efforts to sustainably produce medicinal plants and to preserve medicinal plant knowledge in the face of unregulated harvesting and, more importantly, ongoing deforestation that largely results from large-scale export-oriented soy production. As P. Richards (2011:347) points out, over the past 40 years, Paraguay’s eastern forest has been pressured by “converging fronts of deforestation” by both smallholders and large-scale commodity agriculture. Governmental policies and practices that privilege agricultural expansion or ignore illegal deforestation affect biodiversity as a whole; in terms of medical plants that must be gathered in wild spaces, this both reduces accessibility and affects the sustainability of the remaining patches of land. The consolidation of land associated with large-

scale farming also has the potential to put at risk the availability of plants cultivated by small-scale farmers for the traditional medicine market.

While yuyeros are dependent on agricultural and wild lands for their products, they are also dependent on the commercial spaces they obtain in Asunción’s markets. Yet, despite busy days and many customers who valued their products and knowledge, yuyeros argued that on a day-to-day basis, they are neglected by market administrations, promoting a sense that they are undervalued as contributors to the local economy. As vendors, they are incorporated into and expected to follow a set of rules and regulations to maintain their shops and stalls. This includes paying relatively high fees to obtain required certifications to sell their products and to rent space in the markets. Nevertheless, they consider their working environments unsafe. Despite the diversity in the types of businesses vendors run, shared among them are the dilapidated and dangerous working conditions of the markets. Stores have crumbling walls and improper electric installations and are allowed to continue operation despite risks of fire, electric shock, flooding and building collapse; carts are rusted and falling apart.

On 7 February 2014 these dangerous working conditions were evident when an electrical short-circuit started a fire that quickly spread throughout the tightly packed market; the end result was the destruction of hundreds of vendor stalls (Thomson Reuters Foundation 2014). Since this incident, the dangerous conditions of the market have been publicly problematized and described as in a state of “emergency” owing to its “improvised” construction (Paraguay.com 2014a). In response to the fire, the mayor of Asunción reconfigured the management of Mercado Cuatro, and funds have been directed toward improving the electrical installations (Paraguay.com 2014b). Although this begins to address some of the safety concerns held by participants, the degree to which infrastructural issues will be addressed under the market’s new management has yet to be seen.

Moreover, participants have concerns beyond the structural safety of the markets. For example, one elderly yuyera at Mercado Abasto discussed how they had lost access to services previously provided. She said, “Working conditions are very dangerous. They don’t have service for the people working here, like the children. There are many young people and children working here. Years ago we had doctors who came once a week but not anymore. No one comes now to ask how we are doing.” Aside from pointing to changes in market working conditions, this further highlights vendors’ recognition of the importance of a plurality of health

care options. While their own remedies are important, they also appreciated having access to biomedical care for themselves and their families.

Market administrations were also described as having the ability to determine rent and to put a stall or store out of business, making everyday livelihoods somewhat precarious and at the mercy of power-holders. Participants indicated that they felt they could not lodge complaints about the conditions of their work or make requests for improvement. As one participant from Mercado Abasto put it, "You just have to pay your rent and be quiet. This is good for you."

Campesinos: "If you are poor, there is nothing for you"

Our second case study focuses on small-scale farming, in which farmer participants argue that they and their products are not valued by the state. This partly includes being excluded and ignored in agricultural development, which affects their abilities to make a living as farmers. Lindo Manantial (a pseudonym) is a campesino community in the Piribebuy District, Cordillera Department, approximately 75 kilometres from Asunción. Finnis has been conducting research on agricultural and dietary practices with this community since 2009, as part of a project with agronomists from the Universidad Nacional de Asunción. Data collection methods over three fieldwork seasons include participant observation while living in the community, project planning and outcome meetings with community members, three focus groups and semi-structured qualitative interviews and follow-up interviews with 45 members of 32 households. Some community members participated in focus groups and interviews, while others were involved with only one or the other. Participants' ages ranged from the late teens/early twenties to 75 and older. However, just over 60 per cent of participants were in their mid-forties to mid-seventies; in addition, just over 70 per cent of the participants were women. Age distributions and the gender skew reflect the composition of the community as a whole.

Members of this community typically own less than five hectares of land, which they cultivate manually or with the aid of oxen. Cassava (*Manihot esculenta*), locally called *mandioca*, is the primary crop, and citrus trees (oranges, mandarins, lemons and pomelo) are plentiful, providing an overabundance of fruit during the harvest season. Some households also cultivate other produce including sugar cane, bananas, pineapples and beans. Chickens are commonly raised for household use, and some families also raise a few dairy cattle or pigs, generally for small local sales and household con-

sumption. Although the community is relatively close to Asunción, and thus theoretically better able to access agricultural markets and agricultural innovations (Zoomers and Kleinpenning 1996), road access into the community is poor, limiting travel and restricting access to agricultural markets. Households are unable to rely on agricultural livelihoods for income, something we will expand on later in the article.

In her discussion of citrus farming in Belize, Medina (1997) notes that the country places value on large-scale, export-oriented production as an economic development strategy. Large-scale farmers are valued as contributors to the nation's development, while smallholder production geared toward household and local consumption is given limited economic recognition. Campesinos in Lindo Manantial make a similar argument, highlighting a lack of infrastructure and support. Although they grow cassava as a staple food, they are unable to sell this crop for a combination of reasons, including poor roads to the community making transportation very difficult, and a lack of local factories where tubers could be sold and processed into starch. More importantly, people argue that the current agricultural system is not set up to benefit or support campesinos. Participants state that the government specifically excludes campesinos by withholding resources, including the technical assistance farmers need to become more efficient, profitable and, in the context of climate uncertainty, more resilient cultivators. Statements such as "We need seeds and technical assistance" (Man, 31) and "We look for assistance, how to grow better crops. But there is no help" (Man, early fifties) indicate the desire for better integration into any national training schemes.

Moreover, farmers argue, not only are they unable to access government resources and support, but also the things they grow—especially cassava and citrus fruits—are not exported and they cannot sell these things within Paraguay; yet imported cassava products and citrus fruits are available for sale in Paraguayan grocery stores. For example:

No one comes to buy [citrus fruits] because the way is too difficult. Also, truckloads of fruits—pomelos and mandarins and oranges—come from plantations in Argentina, so people here can't compete with those huge farms. [Woman, late forties]

All the things are from Argentina and Brazil. The *almidon* (cassava starch) from Brazil is very cheap because the mill is automated. [Man, early eighties]

Farmers connect agricultural marginalization, lack of government attention and their subsequent inability to make a living from farming with feelings of uncer-

tainty, “misery” and concerns about petty criminal activities. For example, one afternoon, early on in the 2009 field season, a farmer took Finnis to inspect a distant field. The night before, approximately 30 cassava plants had been uprooted and the tubers stolen. The owner of the field, a man in his eighties, was angry but claimed that this was the way things were now and that people who stole cassava were probably people who desperately needed the food. In 2010 the same household continued to suffer these kinds of losses, and the owner’s wife voiced concerns about possible violence. People had guns, she said, and there was no use trying to protect the fields.

People primarily discussed stealing and violence in terms of crops, but sometimes it extended to material goods. One man, in his early fifties, described it this way: “They steal food and animals. They even steal barbed wire ... in the past we slept outside but now we have to sleep in the house.” When asked why stealing had become such a problem, he said, “There’s no work, so they have to steal. There’s a lot of misery here ... People suffer, children suffer.”

Outmigration is one response to the inability to make a living from farming. Weisskoff (1992) suggested that worsening land distribution and rural poverty in Paraguay would lead to a significant migration from rural to urban areas. This is certainly the case in Lindo Manantial, where most young adults have left the community for urban work. Since agriculture is not a viable livelihood, households rely on off-farm work or remittances from family members working outside of the community, which are key to the everyday maintenance of life in the village. This is reflected in the demographic composition of the community, in that those old enough to work elsewhere have typically left the very young and the aging behind.

Cultural Knowledge, Loss and Valuation

In this section, we consider how the two case studies illustrate tensions around notions of value when it comes to cultural knowledge and the potential for loss of that knowledge. Both yuyeros and campesinos argue that they—and their knowledge—are undervalued by power-holders in terms of contributing to the nation, even as this knowledge is connected to the cultural heritage of Paraguay. Both groups argue that value is not being associated with their cultural and practical knowledge but, rather, with those who generate large revenues and maintain or bolster international ties.

For yuyeros, the cultural heritage associated with Paraguay’s medicinal plants and their economic accessibility to the majority of Paraguayans illustrate the value

of traditional medicinal plant knowledge. Despite seeing themselves as central to culturally appropriate and socio-economically accessible health care, yuyeros argued that pharmaceutical companies and biomedical doctors were more important to government priorities. We do not want to suggest that yuyeros were without considerable self-interest in expressing discontent about support for biomedicine at the expense of traditional remedies. At the same time, it is important to note that they did not argue that they should be the only source of health care for Paraguayans, and they did not inherently object to the presence of biomedical health care options. For example, yuyeros often described traditional medicines as “slow but sure,” best suited to certain less acute types of health concerns such as gastrointestinal problems, headaches or colds. They acknowledged that certain illnesses (such as diabetes or high blood pressure) require biomedical intervention.

While yuyeros did not see themselves as the only viable medical practitioners, it is important to point out that they wanted to be acknowledged and valued as holding and sharing the cultural heritage elements of everyday and ritual use of traditional medicines. Participants argued that the state government lacks any meaningful knowledge about traditional medicines and consequently does not value the preservation of the rural biodiversity that is directly linked to access to many of these medicines; they were dismayed that the preservation of culturally significant traditional medicinal knowledge did not appear to register on the government agenda. Yet, they asserted, many important members of the government consume medicinal plants themselves, venturing into their shops at Mercado Cuatro to purchase them. Yuyeros were frustrated by this disjuncture. For example, one 81-year-old man expressed dismay about the government’s apparent lack of concern over the sustainability of local plant species, not simply from a practical economic standpoint but also in terms of the possible loss of cultural knowledge. It is the yuyeros who provide access to the plants for those who live in urban centres and who provide the means by which this knowledge can be used. Thus, if yuyeros are a key repository of traditional medicinal knowledge, the question becomes how that knowledge may be maintained if the profession becomes increasingly unsustainable (owing to knowledge loss or limited access to plants) as a livelihood.

For farmers in Lindo Manantial, the focus on knowledge and value centres on pesticide- and chemical-free agricultural practices, as well as general knowledge about preparing and maintaining quality land. As with yuyeros’ discussions of plants versus pharmaceutical

chemicals, farmers argue that “natural” products have an inherent value, even if this is not recognized or supported by recent governments. In 2009, for example, Finnis was invited to examine natural pest control methods for citrus trees, where insects were diverted from fruit by carefully placed containers of sweetened water. Participants indicated that unlike those who produce for mass sale, they grow things in a “natural” way, arguing that their chemical-free farming was healthier for people and better for the land, that the taste of their citrus was very good and that they were happy they were able to eat some foods not contaminated by unknown chemicals. At the same time, they were very aware that these practices reflected and reinforced the position of being agriculturally peripheral and undervalued.

Moreover, the ongoing migration of young people to urban centres and away from farming reduces options for passing on and maintaining agricultural knowledge. For some, this is a cause for concern, as it only contributes to a loss of practical agricultural knowledge, even as it contributes to changes in what people can reasonably grow as their labour base decreases (Finnis et al. 2012). One man, 60 years old, highlighted the loss of knowledge this way:

Children don't want to be farmers now. They don't want to stay in the rural areas because here there is no money. The young people say they want to go to Asunción and we say OK, because you want so many things and I can't give them to you. In 50 years, no one will know how to keep the soil healthy. They might know now, some people, but many people don't know.

This is a problem not just for now, he argued, but also in terms of any future for farming in the area. If farming is unsustainable as a livelihood and people lose agricultural knowledge, then they will not be able to take advantage of any future agricultural opportunities should they be initiated or made possible by government or private enterprise activities, which would further consolidate agriculture in the realm of large-scale, export-oriented enterprises. Thus, most participants argued that there is no future for agriculture in the area because campesinos, their livelihoods and their capacity to contribute to Paraguayan food chains, and subsequently the national economy, were systematically unrecognized and undervalued.

Who (and What) Is Valued?

Yuyeros had clear ideas about who was valued and supported by national and local power-holders. They argued

that because pharmaceutical companies generate more revenue, they are the sole beneficiaries of government support and promotion. For example, a 65-year-old man said, “The government doesn't support us selling the herbs and makes it hard for us ... It supports the pharmaceutical companies instead,” while a 60-year-old woman put it this way: “The government does not support [us] because there is a [financial] deficit and we are not a priority.”

Like yuyeros in Asunción, farmers in Lindo Manantial have very clear ideas about who they feel is valued in Paraguay's agro-economic landscape: the large-scale farmers, especially those who produce for export markets. Thus, participants consider the lack of resources and support for farming—both in the community and among campesinos in general—as part of a systematic neglect by the government in favour of farmers who are *already* economically secure. These everyday concerns intersect with an overall history of land distribution and titling inequities along with rural violence (Hetherington 2008; Nagel 1999), patterns of land consolidation by political and industrial elites, and support for export-oriented (especially genetically modified soy) agriculture (Galeano 2012; D. Richards 2010; P. Richards 2011) across Paraguay, which is part of the New Green Revolution in South America's Southern Cone (D. Richards 2010). Even though farmers in Lindo Manantial are physically removed from the main areas of the country where large-scale soy agriculture has been expanding since the 1990s, they nevertheless understand themselves as part of a larger pattern of smallholder neglect. Participants articulated these concerns in numerous ways:

The government doesn't care for the small producers, only the big farmers with the big companies, especially in the North. All the projects are only for people with professions ... but if you are poor, there's nothing for you. [Woman, 39]

Lugo [the president at the time of the interview] is not interested in the campesinos. Only in the farmers who have a lot of money. [Woman, 60]

The government doesn't help the smaller farmers—they don't help them produce all the seeds on the farm. The government forgets [the campesinos] ... the government will only help the companies and the big farmers. [Man, early fifties]

The connections between this sense of neglect and feeling undervalued was summed up succinctly by one 49-year-old woman, who linked money, government and the agricultural future of the community when she said, “The big companies have money but the other farmers

are poor, so the government forgets about us ... I don't see a future here."

Somers (2008:90) notes that in market economies, knowledge, skills and contributions are assigned values, and those without significant market value may not be recognized by elites as having equal moral wealth and equal value to the nation. In thinking about this, it is important to consider *who* is doing the valuing of knowledge, skills and contributions and the ways that relative value may therefore be very different. Yuyero experiences in Asunción are an important example of the potential everyday *messiness* of valuation, highlighting a disjuncture between how medicinal plant remedies are valued as part of Paraguayan identity and cultural heritage and how they are undervalued as a part of the Paraguayan economy, even as they are an important livelihood strategy for yuyeros. Similarly, campesino farmers value being able to grow their own foods, not just because they have to buy things if they cannot grow them, but also because they know *how* the foods have been grown and they value access to organically-produced foods.

Incorporation, Exclusion and Precarious Livelihoods

Given our previous discussion of different valuations of bodies of knowledge, in this section we briefly explore how issues of incorporation play out in terms of livelihood implications. We have already discussed perceptions of neglect but the terms and conditions of incorporation also play out in the everyday constraints that people face in trying to make a living. Du Toit (2004:1003) notes that marginality is defined by the terms and conditions of incorporation into social systems, particularly economic systems; we must, therefore, go beyond earlier ideas of an exclusion/inclusion binary when discussing livelihood activities. This means thinking through how marginalized groups are not so much excluded as adversely incorporated into economic and social structures, contributing to chronic poverty. Nevile (2007:253) adds to this argument by highlighting the importance of asking whether incorporation or exclusion is active or passive, related to active choices or unintended consequences of economic and trade policy decisions. Kantor's (2009) analysis of the labour market inclusion of women in Lucknow, India, demonstrates the need to look at the specifics of the ways that people may be simultaneously included and excluded in different aspects of their livelihood activities.

Yuyeros occupy an economic position that incorporates elements of informal and formal economic systems, in that they are required to adhere to certain conditions

to sell their products but are excluded from related benefits. As discussed above, yuyeros must obtain certifications to sell their products, and they can expect that market administration members or police will check for these certifications; without them, they are at risk of having their businesses shut down. Nevertheless, market or municipal administrations do not ensure that the markets are safe, secure places to work. Thus, despite being technically governed by an administrative body, vendors argue that, in reality, Mercados Cuatro and Abasto are not monitored or regulated in any kind of meaningful way, leading to the dilapidated and dangerous working conditions.

One of the implications of this kind of precarious, peripheral positioning is the threat of underemployment, particularly for the smaller stalls or sidewalk sellers but even for yuyeros who are relatively successful. For example, one 61-year-old female vendor explained that she has to pay a lot of money to keep her stall in Mercado Cuatro, yet she does not believe that the administration inspectors, who she says can be quite volatile, really know what she does. Another woman vendor in Mercado Cuatro asserted that it costs a lot of money to have a big store and that some plants are too expensive for sellers to purchase from suppliers, thus curtailing profit potentials. Despite the popularity of medicinal plants, the high costs of space in the market compared to the relatively low profit made per remedy means that for some vendors, even when business is good, improving one's standard of living is difficult or impossible. One 60-year-old female vendor explained that she does not bother working on Sundays because the profit she would make in one day does not make enough of a difference to warrant omitting the time off. As she puts it, "If you're poor you're always poor."

Precarious livelihoods also characterize the experiences of campesinos in Lindo Manantial, where current agricultural livelihood woes are the result of limited land availability, trade relationships and government decisions that are simply not to the benefit of campesinos, as well as poor infrastructure (roads, markets) that makes crops less marketable. In this sense, the situation can be understood as both active and passive adverse incorporation—active in terms of the macro-level policy decisions that have been made regarding trade relations, the push for export crops and land distribution practices in the country's northern departments (Galeano 2012; Nickson 2012; D. Richards 2010; P. Richards 2011; see also Nagel 1999 and Weisskoff 1992), yet passive in the sense that farmers feel they and their community are simply being ignored. The system, farmers argue, is just not set up for their benefit.

In other words, farmers have poor access to opportunities, information, political connections and leverage (Bird and Shepherd 2003:592), signalling their economic exclusion and devaluing their potential contributions to the nation. The reality is that small-scale farming practices provide access to key subsistence foods like mandioca for campesino households. But since their practices do not fit the norms of the region's New Green Revolution, this can be understood as a kind of cultural exclusion even as the proliferation of export agriculture and large-scale farming has contributed to rural food insecurity and rising food prices (D. Richards 2010).⁴

As with yuyeros, this state of affairs results in persistent underemployment. Lindo Manantial farmers cannot live from their agricultural activities alone, even if some households manage to grow a relatively diverse range of foods for household use and sometimes local, petty trade. As such, they are increasingly dependent on off-farm work and remittances from adult children who have moved to work in urban settings. Although there are exceptions, employment is often informal or low-paying, including domestic, construction or ranch-hand jobs, which in themselves offer limited security for migrants. Yet, just as yuyeros understand that traditional medicines cannot be the only health care options in Paraguay, farmers acknowledge that Paraguayans cannot produce all the foods consumed in Paraguay, nor can small-scale farming be the only viable form of farming in the country. What they do want is to be recognized as being able to contribute some of the foods available to the everyday Paraguayan consumer, and they want the support and acknowledgment necessary to do so.

Concluding Thoughts

In this article we have demonstrated that, despite working in different sectors of the Paraguayan economy, both yuyeros and campesinos argue that they experience marginalization and neglect, whether in terms of poor or crumbling infrastructure, political priorities for economic development or the dismissal of their skills, knowledge and products by national and local decision-makers and elites. Precarious livelihoods and questions about security are entangled with this marginalization. Even when, as in the case of yuyeros and traditional medicinal knowledge, they are connected with important notions of Paraguayan identity and tradition, this is not necessarily understood as being valued by elites and governance structures. Inequities and livelihood struggles, then, become part of everyday reality as a result of the ways economic and power structures are set up and maintained. At the same time, Paraguay as a nation

is marginalized when it comes to its economic and political relationships with its larger Mercosur trading partners. This is something that campesinos in particular recognize when they discuss the inability to compete with the prices of crops imported from Brazil or Argentina.

Campesino and yuyero experiences also highlight the ways in which the assignment of value (economic and cultural) is intertwined with their livelihoods. Concerns about the future of their livelihood practices are not just about individuals or households. Instead, participants point to worries about and implications for the future of the place of certain bodies of knowledge within the Paraguayan nation. These livelihood and practical anxieties point to the need for Paraguayan elites and power-holders to rethink, in a positive and meaningful way, the value of yuyero and campesino knowledge, activities and contributions to the nation.

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Notes

- 1 President Lugo and his coalition did not have a majority in the National Congress, and many of his initiatives did not have the support of other members of the government. See Bertelsmann Stiftung BTI 2012 and Nickson 2012 for a more detailed discussion.
- 2 Yuyeros point out that traditional remedies cost much less than pharmaceuticals, which may contribute to their popularity.
- 3 Personal interviews with faculty members, 22 and 26 July 2011, Universidad Nacional de Asunción.
- 4 See Gartin (2012) for an exploration of urban food insecurity in Paraguay, particularly in terms of food deserts and food prices.

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Local Knowledge/Lacking Knowledge: Contradictions in Participatory Agroecology Development in Bolivia

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Abstract: Questions of who is understood to have agricultural knowledge, and how this perception influences knowledge exchange, uncover power imbalances in local, national and international relations. Analysis of fieldwork in Norte de Potosí, Bolivia, finds that NGO and state agronomists position themselves as teachers to farmer-students, masked by participatory language. Barriers to knowledge exchange and collaboration remain stubbornly entrenched even in efforts to transcend power relations and improve participatory approaches. Ironically, agronomists are positioned to hold both “expert” and “local” knowledge, which is then repackaged within agroecology. Meanwhile, farmers using compliant discourse (sometimes strategically) continue to be positioned as lacking.

Keywords: local knowledge, participatory development, farmer experience, exchange, agroecology, barriers to collaboration, Bolivia

Résumé : Comprendre qui est perçu comme détenteur du savoir agricole et comment cette perception pèse sur l'échange des savoirs met au jour les inégalités de pouvoir qui sous-tendent les relations locales, nationales et internationales. L'analyse d'une enquête de terrain réalisée à Norte de Potosí, en Bolivie, révèle que les agronomes des ONG et de l'État se positionnent comme enseignants auprès d'agriculteurs-étudiants, ce que masque le langage participatif. Les obstacles à l'échange des savoirs et à la collaboration demeurent puissants, même au sein d'actions visant à dépasser les rapports de pouvoir et à améliorer les approches participatives. Ironiquement, les agronomes se voient positionnés comme détenant à la fois des savoirs « experts » et des savoirs « locaux », ce qui se trouve ensuite reformulé dans l'agro-écologie. Parallèlement, les agriculteurs qui tiennent (parfois de façon stratégique) des discours conformes continuent d'être positionnés comme étant déficients.

Mots-clés : savoirs locaux, développement participatif, expérience agricole, échange des savoirs, agro-écologie, obstacles à la collaboration, Bolivie

Bolivian Agronomists and the Value Placed on Andean “Local” Knowledge

Livelihood strategies through organic farming and agrobiodiversity that involve collaborations between farmers and local, national and international organizations transcend geographical, social and cultural boundaries. Yet the knowledges and experiences in these encounters, even as they attempt to be collaborative, create friction (Tsing 2005). Asking who is understood to have agricultural knowledge, and how this perception influences knowledge exchange, uncovers power imbalances in local, national and international relations, as well as along lines of gender and class, that remain barriers to exchange and collaboration, even as efforts are made to transcend traditional power relations and improve participatory approaches. This article examines certain barriers to knowledge collaborations that arise among Andean Quechua-speaking farmers, a Bolivian rural development NGO and a research project initiated by the state in efforts toward building sustainable agriculture systems. Despite shared concerns for increasing agrobiodiversity, food sovereignty and organic farming, tensions are evident in the power imbalances embedded in these relationships, as well as in the divergent values and meanings assigned to participatory methodologies. While participation is hailed as the corrective to previous failed top-down approaches and rhetoric draws on notions of *collaborative knowledge*, in practice, emphasis is placed on participatory methodologies as *teaching* tools by both the state and the NGO. The tensions that arise along these lines of power are reinforced by neoliberalism as it informs sustainable development practices, while conflicting with the Bolivian government's ideological position as a “21st century socialist” republic.

Interviews and participant observation with NGO technician-facilitators and government-employed agronomists reveal a paradox in understandings of local knowledge. Everyone working with farmers talked about the value of local knowledge and about supporting farmers'

activities; yet they unanimously emphasized their roles as teachers and the importance of transmitting the knowledge they held as experts. Were the agronomists simply paying lip service to another development buzzword—*local knowledge*—while positioning themselves as experts? Or is there another way to explain how someone could describe farmers as *lacking* knowledge and, in the same conversation, say they themselves had learned so much from “local knowledge”?

In addressing these questions, this article explores the contradiction between discourse and practice to uncover how local agricultural knowledge is valued (or devalued) and who is recognized as holding such knowledge. This examination reveals contradictions in how farmers see their own knowledge as well—sometimes lacking, sometimes sufficient and, occasionally, superior to that of agronomists. Which knowledges are given precedence over others in practice—including what counts as “expert” knowledge—contributes to the barriers to developing collaborative agricultural knowledge between farmers and the NGO.

The arguments made in subsequent sections are based on findings from ethnographic research conducted in Norte de Potosí, Bolivia, in 2010. Focusing on participatory ecological agriculture development between a Bolivian NGO, ODEP¹ (in English, Ecological Development Organization of Potosí), and several participating households from two farming communities, Tomacoyo and Q'ayarumi, in the Chayanta province of Norte de Potosí (Northern Potosí), the analysis emerges from a broader project to theorize relationships between farmer knowledge and strategies, state policies and international aid in Bolivia.

With the support of a few international organizations, including a Canadian NGO, which I have simply called CANGO, ODEP works on micro-irrigation projects, agrobiodiversity and soil conservation strategies and promotes organic farming. Almost entirely staffed by agronomists, it combines scientific methods of agriculture with adaptations to centuries-old approaches to farming on steep mountainsides. ODEP describes itself as supporting small-scale farmers by empowering them through sustainable agriculture training that can make these farmers more competitive in regional and national markets, raise their self-confidence, help them adapt to climate changes and promote the protection of the rich but endangered biodiversity. One of the NGO's keys to protecting agrobiodiversity is the promotion of organic farming, strongly discouraging the use of the chemical fertilizers introduced during the Green Revolution in Bolivia (and widely promoted over a few decades by various regional and international NGOs), which resulted

in a loss of biodiversity. While the training is officially technical, the NGO recognizes a need for a political component in the promotion of an organic market within Bolivia; thus, it also encourages certain farmers to involve themselves politically at the municipal level of government. ODEP works alongside other local governmental and non-governmental bodies to increase farm families' knowledge of new laws and rights within the relatively new Constitution.

One such law, law 3525, focuses on organic production and biodiversity conservation and outlines the process of building a national organic market, certifying organic farmers and ensuring food security through food sovereignty. When my research commenced, the government had yet to turn this into action in Norte de Potosí. Six months later, the Bolivian Agricultural Research Program (PROIAB), a governmental organization concerned with agricultural research (both organic and conventional), arrived with a participatory research plan. PROIAB held a series of workshops to encourage farmers in the municipality to move toward not only producing without chemical inputs but also meeting the various standards required to be certified as organic producers at the national level (more stringent regulations than local farmers were accustomed to but much easier to achieve than international standards for organic certification).

Historical tensions remain between government organizations and NGOs, with each seeing the farmers as having good reason to distrust the other. Further complicating matters are international funding institutions that wish to impose a structure on how the state can move away from doing research itself and instead oversee NGO projects from afar. In contrast to the types of collaborations that appear to be on the rise between Bolivian NGOs and between these organizations and various international actors, the government, at the time of this research, was wary of entering into such relationships. Evo Morales' Movement Toward Socialism (MAS) government reflects a shift occurring in various countries of the global south in which politically left-leaning parties have gained power in reaction to previous administrations enamoured by neoliberalism. Though it is increasingly evident that anti-neoliberal discourse does not always equal anti-neoliberal practice in Bolivia (Haarstad and Andersson 2009; Kennemore and Weeks 2011; Webber 2008), the government is cautious about entering into relationships with organizations that might be under the influence of global neoliberalism. Yet government agencies experience pressure from certain key international funding agencies and from various key Bolivian institutions to collaborate with these same

NGOs (or to play a hierarchical role in which the government audits the work of the latter). The state is in a difficult position between international pressure to conform to neoliberal approaches to development,² a desire to fortify indigenous cultural traditions of complementarity and the Andean perspective of “living well” (*buen vivir*)³ and, finally, domestic political pressure to promote policies that improve Bolivians’ livelihoods. In response to these competing pressures, the government skates a fine line between socialist and neoliberal-capitalist approaches (also see Kennemore and Weeks 2011; Postero 2013).

Tensions arise in international–national, national–local and governmental–NGO relations. Although aspects of these tensions relate to a particular Bolivian colonial history, the outcome of this examination has broader application. Lines are blurred between state, for-profit and non-profit actors, as states increasingly enter into “arrangements for joint governance of issues and places” with other organizations, particularly NGOs, at an increasingly global level (Holmes 2011:4). In this article I examine the efforts of these organizations toward participatory development in terms of understandings of local knowledge that reveal power imbalances, masked by sometimes contradictory participatory language.

With the turn in development toward increasing participation of local beneficiaries, “local knowledge,” as a necessity for both project efficiency and sustainability, has been incorporated into the neoliberal development agenda. However, the assumed distinction between local and professional knowledge often manifests in the emphasis on teaching rural people proper, scientific management (Nightingale 2005). My research finds this tendency, bringing forth a further complication as professionals embrace local knowledge as the root of agroecological knowledge, which then needs to be taught to farmers. The decentralized neoliberal development approach emphasizes expert knowledge as part of the growing legitimacy and professionalization of NGOs. However, the dichotomy between local and expert scientific knowledge may be deceptive when the “experts” are local but trained in such a Western knowledge tradition (see Escobar 1995; Hobart 1993). They may even be university-trained agronomists from indigenous farming communities, as are several in ODEP. While this is still likely to have the effect of marginalizing local knowledge, placing value on local knowledge in a way that is defined by the dominant knowledge, with the ideals imbued in words like *partnership*, *participation*, *collaboration*, *exchange* or *empowerment*, masks familiar power relations. ODEP’s concern with demonstrating successful and culturally appropriate participatory development to

CANGO conflicts with the reality that employees in practice often fall short of the NGO’s stated values and goals in levelling power imbalances. Hence, ideals of respecting local knowledge fall short of their potential for real collaborations of knowledge, just as sincere efforts in participatory development fall short of the type of substantial transformation suggested by Hickey and Mohan (2004).

Central to the current debate around global efforts toward “sustainable agriculture”—including who is perceived to hold agricultural knowledge and how that knowledge is acquired—are questions of the power dynamics between development projects employing scientific knowledge and those that employ the local knowledge(s) of rural peoples (e.g., Altieri 2009; Altieri and Toledo 2011; Gonzales et al. 2010; Hobart 1993; Walsh 2010). Sustainable development and agrobiodiversity conservation, as practised by ODEP, can be understood within the context of the growing agroecological movement. It has aimed to recover indigenous practices, long undermined by the power relations of scientific agricultural knowledge and technologies guided by neoliberal notions of efficiency and economic growth. Despite its growing popularity, organic agriculture remains marginal in the global market. Organic production has often found a place in niche markets for consumers in the global north, which has not readily benefited the producers of these goods (Altieri and Toledo 2011). Efforts to promote organic farming contend with a long history of indigenous farming practices being devalued both globally and locally. While Altieri and Toledo (2011) and others highlight the important implications for food sovereignty in an approach guided by farmers’ local knowledge, some, like Gonzales et al. (2010), are concerned with the tendency to conflate agroecological farming with indigenous (local) knowledge. Although agroecology and Andean indigenous knowledge share important approaches in contrast to conventional agriculture, Gonzales et al. highlight the embeddedness of the former in Western science and thus the “epistemological, ontological and cosmological/spiritual differences” (2010:169).

Power relations inherent in encounters between these two (similar) agricultural knowledges imply that the agroecological approach can certainly be top-down. Moreover, such global knowledge, tied to international development, travels through networks that facilitate the movement of knowledge, while aiming to manage people’s conduct and the objects of development (Ilcan and Phillips 2008). We should be cautious of accepting too readily the claims of agroecological farming that it is based in local knowledge without looking for ways in which it directs farmers toward methods that detract

from their actual lived experience and generated knowledge. We are reminded of Tsing's (2005:13) astute observation that collaboration between different knowledges creates new interests and identities that inevitably will not benefit everyone. Gaps are created where truths that are incompatible are suppressed. So globally circulating knowledge—in this case in terms of sustainable agriculture and development—creates new gaps even as it grows through the frictions of encounter (13).

This discussion also draws attention to the positioning of agroecology, as an approach that is emerging in response to the power of commercial agriculture, with its inherent problems, as well as the neoliberalization of nature. When we examine the relationship it has to the dominant scientific agriculture of the global north, light is shed on the paradox introduced above, that is, how agronomists and others could simultaneously credit "local knowledge" for teaching them, while disregarding or dismissing local knowledge in practice. I return to this issue after exploring attitudes, efforts and contradictions among farmers, ODEP workers and state-employed agronomists that both facilitate and hinder efforts to collaborate.

Persistent Barriers to Local–Professional Collaboration

Angel, an agronomist overseeing PROIAB's organic research projects across Bolivia, reproachfully recalled the lack of government oversight during previous neoliberal administrations. He was optimistic about the future of agricultural research and development now that the government was taking a more active role. "When you decide to work with participatory research," Angel explained to me, "you are dealing with the failures that other institutions have made⁴ ... you create a bond of friendship with the community and the farmer is going to develop confidence in you." This idealistic picture of trust and mutual respect could apparently develop automatically through farmers participating in current Bolivian state-led research. Yet Angel's enthusiasm for his organization and the MAS government's ability to correct what he described as damage done by NGO-sector professionals did not extend to any real system of collaboration, in practice, between small-scale farmers and agronomist development workers. Imbalances in power relations were imagined to naturally smooth out by hiring staff from the general region in which they would work and by ensuring an equal number of male and female farmer participants. Previous problems would be avoided: Research and development would not be top-down, it would be effective at training farmers, local knowledge would be used, women would

fit right in simply by ensuring equal numbers, and farmers would naturally trust the government more than the NGOs.

By contrast, ODEP, an NGO with years of experience in this particular region of Norte de Potosí, could articulate more clearly the specific participatory methodologies it employed, compared to the recently arrived Bolivian state employees. ODEP took a standard neoliberal development stance of training farmers to be more "productive" and more "marketable," promoting individualism in several ways, coupled with language of restoring resilient local knowledge through supporting agrobiodiversity, organic production and adaptation to climate change. A handbook for ODEP employees provides an explanation of the philosophy underpinning the NGO's many participatory methodologies as employed in the NGO's training workshops. With regard to encounters of different types of knowledge, this document portrays ODEP's ideals in participatory planning, research and development with farming communities. It provides a plan for how the agronomist transitions from a "technician"—associated with top-down development—to a facilitator (reminiscent of Chambers 1997). On the one hand, the imagined technician uses top-down methods; maintaining the attitude that people must learn from "him," he monopolizes the floor (*tomar la palabra*), poses "closed questions or suggests answers" and generally upholds the power relations that give him status. On the other hand, the facilitator is imagined (among other things) to "consider all knowledge valuable and to work along side peasants supporting them with respect."⁵

Adriano, an ODEP agronomist, explained the NGO's role to me in a similar way to the handbook, positioning farmers as holders of agricultural knowledge, whose knowledge could be strengthened with agronomy techniques:

We are just there to orient them. Nothing else. We are just teaching them the *technologies* but they know what to do. We are not working with the Green Revolution or chemical use; what we are doing is implementing organic agriculture. The methodologies we use are because we want them to learn, to see how to improve the production and we strengthen basic knowledge.

Adriano draws attention to how his organization plays a supportive role for farmers, rather than imposing foreign (harmful) tools that have eroded local knowledge (Altieri 2009; Walsh 2010). In discourse with CANGO, Adriano is referred to as a facilitator, but on a practical day-to-day level, he is always referred to as (and calls himself) a technician (*técnico*). The distinction provided

in the handbook places the two titles of *facilitador* and *técnico* in sharp relief to create a framework for understanding the NGO's ideals. It constructs the facilitator as someone who is socially and culturally sensitive, someone who respects protocols and the etiquette of rural people and is able to recognize the changing moods of participants and adapt accordingly. Involving everyone, especially women, he or she creates "an atmosphere of trust for everyone to express himself or herself." Where the technician is dismissive of alternatives, the facilitator remembers "that everyone has something to say." Where the technician "extracts quantitative data, without trusting that people can act, analyze and understand," the facilitator strives for collaboration and feedback. Importantly, for the discussion at hand, the facilitator is also imagined as someone who "believes that learning is a mutual process" and sees himself or herself as someone who has much to learn and who puts aside issues of status and positions of prestige. In contrast to these ideals of transcending barriers along gender and class lines, *lived experiences*—as expressed in the interviews—portray challenges in practice. Importantly, facilitators are still products of their own culture, with all its biases that privilege the educated, lighter-skinned, male voice (also see Ishizawa 2010).

Local Knowledge through the Eyes of "Experts": Contradictions Uncovered

The language of ODEP—like the language of development more generally (see Cornwall and Eade 2010; also Cooke and Kothari 2001)—officially and in its literature conjures images of collaboration, participation and local knowledge. However, for the most part, individuals within ODEP talked about their roles as training or teaching farmers, in other words, passing knowledge on to them. They talked to me about the role of local knowledge only when I asked explicitly about how it might fit within their projects, which otherwise emphasized training and participation for the sake of learning, rather than for the sake of a collaboration of knowledge. The interviews with professionals were thus often characterized by contradictions in which, on the one hand, with a great sense of pride they credited local knowledge for teaching them what they really needed to know, while, on the other hand, drawing on examples of what they considered misguided approaches (whether they be superstitions or use of chemical inputs) or highlighting the current lack of knowledge to express why training was so important.

While the agronomists employed by the government organizations discussed here often spoke more generally, knew less about specific locations within Norte de Potosí

and had less clearly defined ideas about how to achieve quality farmer participation, government and NGO workers did operate according to a similar logic. Tsing (2005) cautions about how easy it is to imagine local knowledge in remote places as though it is part of a "lost world," timeless and removed from all else. This notion of static and isolated knowledge and the associated romanticism have come from both the political left and right in development (Cochrane 2007; Swartley 2002). In a particularly candid statement, Mario, an agronomist from a governmental food-security organization, shared his perspective on his work in ecological agriculture within various municipalities, including in Norte de Potosí:

What I have seen in exchanges of experience is that [the farmers'] abilities are very limited—I had imagined that they would have more knowledge. We need to keep working on that track—giving them knowledge ... What we don't want is for the producers to just replicate things, we want them to know what they are doing and why. They could also then improve on that technology.

Mario's statement concludes with the theoretical possibility for local knowledge to improve on expert knowledge—in this way there is the potential for collaboration—yet the rest of this statement shows a vertical flow of information from the organization to the farmers. Interestingly, when he was asked whether local knowledge could be used in these projects, his answer shed light on why he had expected farmers to "have more knowledge." Enthusiastically changing his tone from that of the expert with something to teach farmers to that of someone who owes his expertise to the farmers, Mario replied:

Yes! Most of the knowledge that I have, I obtained from the producers' ancestral knowledge! At university I learned conventional and scientific agriculture but the conventional didn't help us much with organic agriculture. I owe my training to the peasants and producers—they are my teachers! The ancestral knowledge is very valuable.

In the course of a matter of minutes within the same interview, I had received vastly contrasting images of indigenous small farmers as people who lack knowledge and as holders of profound knowledge. His statements portray local knowledge as a static possession of previous farming generations. I pressed the issue throughout the interview, and later more was revealed. Central to Mario's concern, and what he saw as his role, was to be a person who can spread knowledge about organic agri-

culture in the face of a strong force of propaganda from those with power over the media, heavily supported and influenced by the global food companies and American corporations. In response to a question regarding the main obstacles for small farmers, Mario elaborated:

First of all the lack of training, the lack of knowledge and I wouldn't say the lack of culture because they have more culture than us, but they need knowledge. The problem is that they get knowledge from the media, which is also a way to be *misinformed*, because those who control the media ... provide information that is convenient for them. For example, they simply talk about transgenic seeds because they own the companies that sell these products ... They have created a dependence. They have created disaster. It's a suicidal method. At the beginning it is very profitable, there are high yields but then the income slows down and they become indebted to the banks and the big companies. As you know, this is what conventional agriculture does. We know this, but the producer doesn't know this, so we are here to show them what others have experienced in order to learn from those mistakes.

Mario sees his role as presenting a crucial counter-discourse and practice to the dominance of the global agro-industry, yet his assessment of the farmers' ignorance of this stands in contrast to his assessment that the United Nations Food and Agriculture Organization—currently funding state-led organic agriculture research but also credited with introducing the Green Revolution to Bolivia—has changed its approach because Bolivians themselves have pushed for these changes. Implicit in this idea is that it is not the farmers but other (more educated, professional) Bolivians who are calling for food sovereignty and organic production.⁶

ODEP agronomists also tended to describe their work as part of a larger effort to resist powerful companies like Monsanto, but ODEP's approach has been to legitimize its role as representing farmers, highlighting concerns about climate change, loss of biodiversity, a desire for leadership, and so on. ODEP argues that the farmers themselves express these concerns. ODEP civil engineer Rodolfo had several years of experience working in farming communities in Norte de Potosí. As he reflected on local knowledge, he highlighted how this knowledge could not be severed from superstitions⁷ and beliefs that dreams are prophetic. As I examined these themes with people in the communities, I wondered how often NGO workers, with their university training, had outright dismissed these ideas. Many of the agronomists at ODEP grew up on farms themselves. Their earliest knowledge of agriculture was couched in local

knowledge, yet the Western-style training they received at university overwhelmed it. Rodolfo raises an important and often muted aspect of what local knowledge entails. Knowledge about how to seek guidance from dreams and notions of luck refuse to fit neatly into scientific understandings. It may be valued as part of culture, but it may be dismissed in encounters between different types of agricultural knowledge, contributing to defining knowledge in narrower terms.

Agronomists as Teachers, Farmers as Students

Although participatory development is treated as the proper approach to take, compared to previous top-down versions, the technicians at ODEP are trained to understand the value of participatory methodologies primarily as teaching tools. Not surprisingly, some people have taken to employing these methods with more ease than others. ODEP's handbook for agronomists facilitating workshops provides multiple examples of games, anecdotes and experiments and reinforces the idea that being shown how to do something and participating in that process is far more effective than simply seeing or hearing about it. However, new agronomists with ODEP who were recent university graduates had been trained to be "expert" technicians rather than facilitators of participatory projects. Moreover, the learning curve could be steep in terms of absorbing and applying ODEP's many methodologies for participatory development. For example, one such agronomist, Teodoro, often talked to me in terms of the knowledge he and ODEP had to transmit. He never responded to my questions with notions of exchange between the farmer and the agronomist, though he did recognize the value of the practical knowledge gained by working in the fields, as opposed to the theoretical knowledge gained in the university. He tended to describe himself in heroic terms as he talked about teaching farmers.⁸

I asked the facilitators what they found easiest and most difficult to teach the farmers. Rocío, a seasoned agronomist who left ODEP to work for PROIAB, really enjoyed promoting organic agriculture. She described the interest and ease with which most farmers understood why agrochemicals were a problem (though she recognized in her new job at PROIAB that certain potato-growing communities in the municipality, heavily reliant on chemical fertilizers, would be hard to convince to move away from such an approach). On the other hand, teaching farmers basic accounting for the entrepreneurial component of ODEP's workshops was very difficult, and she felt she had rarely succeeded in successfully teaching these skills. Teodoro, by contrast,

responded to this question by stressing that everything was hard to teach farmers. An idea or a technique had to be taught over and over, and perhaps on the third time around, the farmers would begin to understand. He felt his ability to teach was aided by holding workshops in which men, women and youth attended so that, rather than one member of the household being responsible to retain the new knowledge and share it with her or his family, at least two household members were participating.

The handbook provided to staff by ODEP highlights that the criteria used to mark success are based on how successfully the student learns, rather than how much the teacher teaches. There was no doubt that this was part of their goal, but my observations showed that women especially had a hard time retaining information as it was framed and were quick to state that they as individuals lacked the ability to remember what they learned from ODEP.

Local Knowledge and the Notion of Lacking Knowledge

The common response of farmers in the two communities to a range of questions regarding local knowledge and knowledge transfer across generations—"We didn't know anything before the institution[s] came"—portrays a narrow definition of knowledge (at least when talking to a formally educated outsider such as myself). This narrow conception emerges from uneven power relations in that what counts as knowledge is that which is acquired through formal channels, such as training by professionals and experts. Mothers and fathers, typically with only a few years of primary school behind them, compared themselves to their children, who, thanks to easy access to high school, now "know things," in contrast to their parents' perceived lack of knowledge. This knowledge through formal education opens doors for their children to go to university and become "professionals"—the dream for a child's future of almost every parent asked. Young people also sometimes responded along similar lines: When I asked 13-year-old Alcira what she had learned from her mother, she replied, "My mom? She doesn't know anything!"

Often the notion of "knowing nothing" arose in my interviews with the opportunity to contrast life before the NGOs entered the communities or before improved access to high school and university education. By marked contrast, in the same interviews people could also very confidently tell me that they had taught their children everything they would ever need to know about farming, so that after their likely move to the city, they would be able to return without difficulty to rural life. So it

seemed that farm families were confident that they knew what they were doing on the land and confident in what they could pass on to their children, yet in a conversation about knowledge, in which the NGO was implicated in the discussion (either directly or indirectly), local knowledge was denigrated.

Since a great deal of local knowledge is acquired on a daily basis through action rather than narration, without having to go to a special institution (like a school or even a workshop), it is possible that this type of knowledge transfer was not seen as being on the same level as specialized knowledge taught by a professional.⁹ Even when it came to what parents considered to be important knowledge to pass down to children, how this knowledge was passed down was not always registered. One of the clearest examples of this was found in talking about the gendered division of labour and teaching children: While mothers clearly taught their sons much about farming, sons were understood to be taught by their fathers.

An important contradiction persisted in the question of who is understood to have agricultural knowledge (as well as how this perception influences knowledge exchange): While the discourse of development workers and farmers alike centred on the idea that farmers now (and recently) lacked knowledge, the farmers' ancestors were imagined to have held important *saberes locales*, local knowledge (discussed further below). This is not to say that such underlying concepts were not contested. In the NGO's farmer-training workshops, I heard a few of the more confident and outspoken men express frustration with being viewed as coming from a place that was notorious for *lack*—lack of sufficient food, lack of knowledge, lack of "civilization"—as Norte de Potosí is imagined by many Bolivians as a very cold and barbaric place (Goodale 2008), intensified by the infamy of its ritualistic fighting.

The Interface of Theoretical and Practical Agricultural Knowledge

ODEP relates the idea of sustainable agriculture to the Andean world view and understanding of *Pachamama* (Mother Earth). In the first of a new series of farmer-training workshops, Rocío gave a presentation in which she described sustainable agriculture as a "mutually beneficial relationship between people, plants and animals and the Earth." ODEP agronomists drew on both their scientific knowledge and what they understood to be ancient Andean knowledge, such as in their adaptation of terraced fields on steep hillsides. Sometimes ODEP mentioned the concept of *saberes locales* to farmers, with vague references to the farming knowl-

edge of local peoples' ancestors (*los antipasados*). This can be read as a counterdiscourse to the attitude of many local farmers that local people *knew nothing* before increased formal education and the intervention of development organizations. In this sense, it was a positive reinforcement of local wisdom and culture. However, in practice this framing was too vague and temporally distant to serve this purpose effectively. Rocío had explained to the farmers when she mentioned *saberes locales* that the ancient techniques and wisdom of the farmers' ancestors needed to be restored. But terrace-building as an example of ancient farming knowledge in the communities of Tomacoyo and Q'ayarumi was less straightforward to the farmers in my study than the agronomists assumed. Despite the visible markers of grown-over ancient terracing further up the mountain above the communities, men and woman alike clarified to me that those had been the ancestors of *different* people (also see Zoomers 2006). The ancestors of the Quechua-speaking ethnic group on the other side of the mountain had made the terraces. ODEP recognized the distinction between these groups of people but referred to Andean ancestors at a wider scale, with which the farmers might identify as *originarios*, but, in practice, the farmers distinguished themselves from their neighbours in the surrounding valleys.

While virtually every professional interviewed emphasized that farmers could not be successful as growers unless they acquired the professionals' knowledge of agricultural techniques, many professionals also claimed that they had gained practical knowledge through working in the communities. This was especially the case for those professionals who had been working for many years, compared to those who had graduated more recently from university. For some, this was simply a product of working in the field rather than studying "theory" at university, but other professionals explained that this more practical knowledge had emerged from encounters with Norte de Potosí farmers already familiar with the land. Rocío, for example, drew attention to the regular work she did in the fields with farmers. She highlighted how conversations about growing techniques and timing happened organically in quotidian aspects of her job.

There were other circumstances in which people expressed the importance of the practical knowledge gained in the field. When I asked farmers what, if anything, they thought ODEP's agronomists might have learned from the community or from working with them, some immediately thought of the practical nature of learning in the field rather than the classroom. I asked everyone whether there was a difference and, if

so, what they thought the difference was between learning about agriculture in a university and growing up in the countryside (keeping in mind that many of the agronomists also grew up in rural locales and learned on the land before pursuing formal education). Several men suggested the same answers that the agronomists tended to give me: The countryside presented opportunities for practical, rather than theoretical, learning (*aprender por uno mismo/experiencia; aprender con la práctica*). The common response from women was that there was a difference, but few were willing to suggest what they thought that difference might be. Others simply told me that it was the same, different but equal. Evita, the grown daughter of a couple who participated with ODEP in the hopes of improving their access to water, began her response in precisely this way, but, as she elaborated, her tone changed and her statement became more of a commentary on the power dynamics in which some forms of knowledge are given value over others:

People that live in the country have *experience*; they know how to prepare the field, when to prepare, they know the timing! Agronomists also know but it's more theoretical, they don't *really* know, right? The people from the country know when it's going to rain, they know how to interpret the wind and the rain. The agronomist could say that ... it's going to rain but in the end, it won't rain. People from the country say it's going to rain because they have that communication with the stars. The agronomists know because they have read many things in books but people from the country know because they have *lived* it. They don't have a *diploma*, that's the difference with agronomists. Both of them learn from each other. I believe people from the country know more than the agronomists but, at the same time, the agronomists can teach us some things, like how to improve the system ... For example, they told us to grow fruit and it's good because it's good for our own consumption, for our health. But the people from the country have more experience because they have more experience looking at the sky; they know about the *stars*, they know about the *wind*.

Evita's point, that university-trained professionals lack important farming knowledge because they miss or misunderstand the signs that nature provides, is important. Her statement signals the idea that knowledge results in lived experience; it is not something that can be simply shown off with a diploma. As a rural schoolteacher, she also talked about the importance of formal education; while I was there she became increasingly interested in participating in ODEP's workshops (at the

end of which she would receive a diploma). Yet, as the following interview segment indicates, she resisted the power dynamics ingrained in the notion of agronomists teaching farmers how to farm. I asked Evita to elaborate on her motivation to participate in ODEP's training workshops:

Evita: I want to anticipate some of the signs for when a plant is going to get sick, because there are various illnesses that can affect the plants. I also want to graft and know how to take care of the plants and when the best time is to plant vegetables, because my father is getting older. I want to know what I need to do to plant—when, which month. Because I have seen my father doing that each time, but I have never done that before.

Jenny Cockburn: Is it possible for you to learn from your father?

E: Oh yes, my father teaches me of course.

JC: So what is the difference between the knowledge your father has and what you can learn from ODEP's courses?

E: Some is the same of course, but if you are an agronomist, you can use that to work here too. It is very good together with the knowledge that we have here. It is better together! [She clasps her hands together for emphasis.] That's why some people in the community become agronomists—like don Romeo—and now his wife is taking courses through the university.

JC: Can you give me an example of how that knowledge is useful when combined?

E: Oh yes, well, with the peaches and little fruit trees that are newer here, of course ... Also, the *climate is changing and we must adapt*. Farmers know how to do that, but agronomists know about these changes too and they know about how to protect the land.

Evita indicates here the role that ODEP and similar organizations may play as a useful resource for farmers, by virtue of their knowledge about environmental problems, such as climate change, or potential improvements in pest control without the use of chemical pesticides. Another farmer, Romeo, who was trained as an agronomist, described his dreams for the future of his community, emphasizing discourse between indigenous community members:

My vision for my community—and Bolivia really—is that *los originarios* [the indigenes] will reach a point where *we* talk about conservation and cleaning up pollution and garbage. At that point it will not just be the institutions teaching us, we will *know* and we will live better!

These farmers recognize the utility of the environmental knowledge offered by ODEP and similar organizations (including the governmental ones) for the future well-being of their families and communities. They also address the potential to take relevant knowledge and integrate it into their local knowledge. Thus, a second theme to be drawn out from Evita's statement above is a notion of hybrid knowledge that keeps local knowledge alive. Evita's desire to develop the agricultural knowledge that her father is understood to already know indicates that *local* knowledge can be maintained and developed through *inclusion* of outside influences, rather than being abandoned in favour of outside ideas (also see Dove et al. 2007; Sillitoe and Marzano 2009). It also serves as a reminder that local knowledge is not static but evolves. Yet, further complicating these questions and the discussion thus far is the fact that, among the ecological agricultural professionals, knowledge is contested.

Expert Knowledge and the Potential for Exchange

The holders of expert knowledge do not always agree about what constitutes expert knowledge; they are also not a homogeneous group. Interviews with agronomists working with other organizations, as well as those who had previously worked for ODEP, revealed these professionals' critiques of ODEP's approach. For example, Virginia, an agronomist with another Bolivian NGO working in Norte de Potosí and the daughter of a farm household participating with ODEP, criticized ODEP and similar organizations for trying to create projects that were unrealistic, and she suggested a solution for working within the limitations of the local environment:

Micro-irrigation and reservoirs are needed but, I ask, *where* is this water coming from? I prefer to work with corn and broad beans that grow with the rain. Then when some people grow these and others grow onions there can be an *exchange*!

This local agronomist highlights the resource problem, a lack of water; however, an uncontested concept, implicit in her statement, is the idea that people should work with what they know and already have, placing more importance on the practice of exchange. The emphasis on exchange counters the potential for jealousy that comes from certain families having more than others, while also requiring less training and added community labour.

ODEP's Canadian NGO partner, CANGO, emphasizes the notion that farmers themselves are holders of expert knowledge. This perspective not only is evident

in CANGO's literature but was also part of the discourse of the various staff members who met with ODEP and visited the communities in 2010 and again in 2011, irrespective of whether their backgrounds were in social science, management or the physical sciences. It was quickly evident through observation that ODEP applied the farmer-as-expert model in a comparably limited way. Beyond the consensus among farmers and ODEP agronomists that the role of the latter was to train the former, there were few observable moments when farmers were recognized as having valuable knowledge to exchange with agronomists. Nonetheless, the participatory method of *Campesino á Campesino* ("Farmer-to-Farmer") exchange was integrated into the NGO's workshops, in the bringing together of several farmers to discuss the challenges they face with climate changes, agrobiodiversity and any number of other subjects that might be addressed formally and informally during group work or over meals.

The idea of exchanging knowledge and experience was raised often around efforts to organize or participate in farmer *intercambios*—farmer experience exchanges. However, I came to understand that these involved less of an *exchange* per se and more of a field trip for the farmers to learn some new—albeit interesting and arguably important—lesson in organic farming and environmental sustainability. At the "exchange" I attended in and around the city of Cochabamba, as one of the modules for a particular set of workshops to create local farmer-promoters of ecological agriculture in their own communities, two Bolivian male agronomists from a government organization concerned with food security (Mario and another man) spoke to the farmers about sustainable agriculture and its importance for Bolivia. They emphasized the important work that the Food and Agriculture Organization and the Bolivian government were doing in agriculture. After they introduced themselves and their topic, the director of ODEP, Juan Luis, introduced them to the visiting farmers from Norte de Potosí. He highlighted what a great opportunity this was for the government agronomists to ask the farmers from a remote area about their experiences and challenges related to farming, food security and access to the market. To my knowledge this was the only moment where the possibility for an actual exchange of experiences was stated explicitly during the three-day "exchange." However, at no point during the workshop did the government professionals ever ask the farmers anything about their experience or ask for feedback during their Spanish presentation.

Their inability to engage with the farmers reminded me of other governmental organization workshops held in the municipality in Norte de Potosí to introduce plans for participatory research and certification of organic farmers. In a workshop led by Angel from PROIAB, despite his idealized views as expressed above, Angel called on farmers only to answer closed questions and repeat back information, reflecting narrow conceptions of the purpose of participation and the challenge of transcending top-down approaches even when the intention is stated.

These instances also shed light on the challenge ODEP faced in overcoming larger (national and global) entrenched power relations regarding who is recognized for their knowledge and given a voice. In this context, it is arguable that ODEP made real efforts to facilitate the collaboration of knowledge between farmers and the NGO, so that my critique of where ODEP fell short should be read within its national and global context.

Still, the "farmer experience exchange" organized for the participants of a series of workshops geared toward training farmers to be community promoters of agroecological methods is a good example of how the notion of *participation* can serve as a loose representation. In this case, the term *exchange* is deceptive in its implication that knowledge transmission is multidirectional. The field trip does allow the Norte de Potosí farmers to participate in several farming experiences showcased by farmers and university professionals. They can ask questions and experience hands-on learning. The fact that some of the teachers were farmers themselves allows for instances that can still be considered "Farmer-to-Farmer" or *Campesino á Campesino*. But the important point here is that the Norte de Potosí farmers always remain students in this framework.

The Global-Local Position of Ecological Agriculture

Let me return to the paradox addressed at the beginning of this article, in which agronomists described local knowledge in ways that made it seem irrelevant to the work they were doing *and* talked with pride about how they had learned from local knowledge. It may be tempting to see local knowledge in this case as an idea that receives lip service, while rarely being recognized as applicable in practice. It is likely this was sometimes the case, but this assessment is too simplistic. Such a generalization of the agronomists' perspectives misses the positioning of agrobiodiversity conservation and organic agriculture as themselves a reaction to the conventional farming practices of global agribusiness, such

as the development of genetically engineered “suicide seeds” and, more locally in Bolivia, the damaging effects of the Green Revolution. The latter brought chemical inputs to solve the problem of poor soil conditions for the nitrogen-absorbing tubers but led to a much bigger problem of decreasing biodiversity and increasing reliance on chemical fertilizers (Altieri 2009; Saad 2009; Walsh 2003).¹⁰ The ecological agriculture movement, building international momentum in the last couple of decades, has aimed to recover indigenous practices, undermined by the power relations of scientific agricultural knowledge and technologies guided by neoliberal notions of efficiency and economic growth. Efforts to promote organic farming contend with a long history of indigenous farming practices being devalued both globally and locally, so it is not surprising that ODEP emphasizes the importance of revaluing locally grown, native foods and finds ways to support these practices. Yet, in practice, power relations remain entrenched most of the time, and even Rocío, the staff member most concerned with levelling power differences, still understood her main role in the community as a transmitter of crucial agricultural knowledge.

Andean local agricultural knowledge encompasses centuries-old techniques for growing on steep mountainsides. ODEP and other actors in agroecology (non-governmental and governmental alike) place emphasis on revaluing this knowledge as vital not only for local problems of food security but also for global concerns of biodiversity knowledge. ODEP’s efforts are sincere and dedicated to strengthening marginalized farming communities against the ever-encroaching forces of neoliberal global agribusiness. NGOs like ODEP participate (to varying degrees) in the growing resistance to the “agribusiness-as-usual” schemes to monopolize ownership of genes and knowledge while finding “solutions” to food shortages through the global economic market that rarely provide lasting improvements in the lives of small farmers (the prevalence of “suicide seeds” is a good example). Altieri and Toledo (2011:609) shed some light on what is needed in a way that reflects the beliefs underlying ODEP’s work:

Dismantling the industrial agrifood complex and restoring local food systems must be accompanied by the construction of agroecological alternatives ... Of key importance will be the direct involvement of farmers in the formulation of the research agenda and their active participation in the process of technological innovation and dissemination through *Campesino á Campesino* models where researchers and extension workers can play a major facilitating role.

This is, in part, what ODEP employees and the employees of other similar NGOs and government agencies intend as they form alliances not just with other organizations or local governments but also with universities, in addition to potential future ties with schools. It is helpful to recall Cooke and Kothari’s (2001) recognition that participation that involves sharing knowledge, negotiating power relations and engaging in political activism may challenge oppression and injustices. Yet development workers may draw on these concepts in describing participation, while the participation in practice may actually conceal and reinforce oppressive power relations and injustices in their various manifestations (Cooke and Kothari 2001:13). How this argument can be applied to ODEP’s participatory approach to working with farm households and communities depends on the scale.

At a larger, transnational scale, ODEP’s work with farmers involves working against the dominance of agribusiness giants and unjust global market relations. It involves both technical and political approaches to increasing food security and draws on both traditional Andean farming knowledge and scientific knowledge to do this. Shepherd argues that:

NGOs cannot succeed in utilizing local knowledge without challenging some of the fundamental tenets of development, not only in terms of development’s reliance on external or foreign technologies but also in terms of the kinds of narratives that are invoked to define the problematic of the local environment. (2005:36)

ODEP’s promotion of organic agriculture, agrobiodiversity and food sovereignty challenges the reliance on external/foreign technologies. It challenges the narratives invoked to define the problematic of the local environment, that is, in terms of drawing on, as well as translating, aspects of the Andean cosmovision (such as *buen vivir* or gender complementarity) to present to their international funders.

Meanwhile, at the *local* scale of relations between NGOs and participating farmers, in many ways power relations remain entrenched, with agronomists as teachers and farmers as students, and participatory approaches are recognized to be the most beneficial for their promise to transfer knowledge to the student. In ODEP’s use of the *Campesino á Campesino* model, information flows in one direction most of the time. Participatory language masks tendencies to fall into traditional patterns; as this article shows, what qualifies as “exchange” may be unidirectional.

Who Holds Agricultural Knowledge? Imbalance Hides in "Exchange"

Despite much discourse to the contrary during exchanges among NGOs and in ODEP's literature, the relationship between the Bolivian NGO in this case and the farmers shifted easily and routinely into a common power dynamic in which, as Hobart (1993:11) put it, the relationship of developers and developed is usually regarded hierarchically by *both parties*. Thus, "communication easily becomes the giving of information or instructions by those with expert knowledge" (11). So farmers expressed their lack of knowledge as they defined it in terms of formal education, saying things like "we did not know anything before ODEP came." Time and participant observation provided insight into which farmers really seemed to feel this way, compared to those who made such statements but also recognized that they, as farmers, had much more practical local knowledge than the agronomists. But the traditional power dynamics encourage rural people with local knowledge to defer to professionals with scientific knowledge, even when they *recognize* that the value of their own knowledge is muted under these dynamics.

ODEP's efforts to raise the confidence of farmers are undermined by the limitations of their definition (in practice) of local knowledge. Treating local knowledge as something that the farmers' *ancestors* held—reifying this aspect of indigenous cultural heritage—emphasizes what the farmers today lack. And, in a context where farm families readily identify knowledge as something that one attains from formal education, few of the agronomists are challenged to transcend the comfortable position of relative power they enjoy. Rocío was exceptional in thinking critically about how to resist traditional hierarchical relations along class lines and incorporating this into her work (i.e., discouraging formal titles or sitting and cooking with women). At the same time, however, she readily embraced her role as knowledge provider and participated in transmitting the notion of local knowledge as lost. There is a disconnect between that practice and the conscious effort to collaborate and treat these different types of knowledge as equal. While ODEP's handbook, as discussed above, guides agronomists to think like "facilitators," if this is not part of a re-education process, many agronomists will not automatically make such a shift, having received training that undermines this view.

The farmers who choose to work with ODEP participate in this dynamic by devaluing their own knowledge. While windows of opportunity arise through the efforts of individuals with a strong dedication to removing bar-

riers along class/status and gender lines, such as Rocío, this does not mean that the players involved will be open to such exchanges. The farmers themselves do not often offer their own knowledge and experience without being asked very pointed questions, and those who enjoy expert status in agriculture do not necessarily recognize the resource of farmer knowledge.

Building on Tsing's (2005) observation that collaboration is not a simple sharing of information but creates gaps where truths that are incompatible are suppressed, we can look at sustainable agriculture, through organic production and agrobiodiversity conservation, as "globally circulating knowledge" that creates new gaps even as it grows through the frictions of encounter. ODEP and other professionals draw parallels between some of their techniques and ancient local knowledge, while either ignoring or relegating to cultural mythology the ancestral knowledge that farmers described as the *practices* of their parents and grandparents.

Group work, such as within workshops, does allow for a degree of farmer-to-farmer knowledge exchange in important ways. The chance for farmers who live in different communities within the same region to work in groups on given issues leads to interesting possibilities for collaborative knowledge across commonalities and differences. However, the subjects are shaped by the NGO facilitators and ultimately lead to learning—and reinforcing—certain concepts, such as resource management and marketability, rather than shared rituals of other types. Traditions are repackaged to make sense within scientific knowledge as something that is morale-boosting for participants, such as Mario's assessment that "they" have more culture than "us" but lack knowledge.

Local Knowledge Repackaged

My field experience indicates that people with some education are in a position to talk about knowledge in ways that the majority may not be. Interviews quickly revealed how much more easily Evita and Romeo, as farmers *and* country schoolteachers, could talk about agriculture, culture and knowledge, compared to many other adult community members. The tendency to use as few words as possible to explain something to me or to say, "I don't know," "It's just what we do" or "It's just custom," may also reflect a discomfort with a superficial imposition to *narrate* their knowledge. It also sometimes reflected expectations regarding what I was capable of understanding as an outsider (not limited to white foreigners but also including urban professionals and even extension workers from a range of professions). The inability or unwillingness to engage in a

process of narrating lived, experiential knowledge might at times be misinterpreted as a lack of knowledge, particularly if those same farmers pay lip service to that idea and say they need to be trained by knowledgeable professionals.

The issue of exchange raises another question about how knowledge is interpreted by those whose aim is to “facilitate.” Mario, a state-employed agronomist, determined through “experience exchange” that small farmers had less knowledge than he had expected. I may risk romanticizing local knowledge by insisting that it was *there* and he just could not see it; however, the above discussion demonstrates that farmers do possess knowledge and in certain contexts—usually when it is not being compared with the knowledge of professionals—place value on that knowledge. This raises the question of how, despite sincere efforts to facilitate it, the design of exchange between farmers might be framed in a way that does not necessarily achieve its goal.

Facilitators shape the vehicles of knowledge transmission. Within this framework some knowledge will be communicated, and some will not. The participants are still influenced by underlying power relations. It seems likely that when farmers remained silent when a professional voiced his or her wish to hear from them, they were deferring to the professional, accepting pre-established power dynamics. Moreover, I suggest that farmers were dismissive of their own knowledge as a strategy to gain institutional support within the established power relations—from colonialism and dependent capitalism to neoliberalism—that portrayed farmers as lacking knowledge. While ODEP’s analysis was that farmers needed outside intervention to raise their self-confidence, certain farm households did not truly believe their own knowledge was deficient and attended ODEP’s training sessions only to secure assistance with their more pressing concerns, such as improved irrigation.

The treatment of local knowledge as something rooted in a vague glorified ideal of the Andean past, as the knowledge of ancestors, lends extra legitimacy to modern ecological agriculture practices. The development organizations intervening in these communities can thus position themselves as *re-establishing* local knowledge. But placing value on local knowledge as something that has been or is being lost but that is restored through the work of ecological agriculture has a greater implication than “simply” maintaining power relations that stubbornly persist. Ultimately, an enormous irony is at work. Farmers remain positioned by this framework as lacking both scientific agricultural

knowledge and local knowledge, whereas the agronomists who resist conventional agriculture can become the holders of *both* scientific knowledge and local knowledge. The agronomists, already enjoying the position of experts, are then able to impart these knowledges in a combined, repackaged way to the farmers with whom they work.

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Notes

- 1 NGOs, government organizations, people and communities have been given pseudonyms. It is not my wish to criticize specific organizations or individuals. The issues here are not restricted to these particular institutions or places but can be found in international development and interfaces of knowledge more generally. The tensions between understandings of who holds agricultural knowledge (in practice) have broader application for “sustainable” agriculture development.
- 2 During previous neoliberal administrations, Bolivia, like Latin America more broadly, saw a proliferation of private-sector organizations. Later phases of neoliberal reform emphasized the development of human resources (such as human capital and capacity-building), through social inclusion and alleviation of rural poverty, as an imperative for sustainable economic growth (Haarstad and Andersson 2009). Andolina et al.’s (2009) notion of *social* neoliberalism is helpful for conceptualizing the sequenced transformations that neoliberalism has undertaken, as the analytical term recognizes the shift from earlier narrow versions of neoliberalism that focused primarily on privatization, downsizing the state and trade liberalization (see also Hale 2002 and Molyneux 2008). This paradigm expands notions of development’s potential by placing terms like “diversity, inclusion, sustainability and stakeholders alongside terms such as efficiency, self-management, productivity, and capacity” (Andolina, Laurie and Radcliffe 2009:10). Participation in development is understood to be rational and responsible, making local communities and individuals “partners” in the development process.
- 3 *Buen vivir* or *vivir bien*, meaning “to live well,” emerged as an alternative concept to Western classical development approaches, based in indigenous traditions. Within the Bolivian constitution, the term is used to cover various rights, including the rights of the Earth. For more on this subject see Gudynas 2011.
- 4 Throughout the interview with Angel, he pointed to failures in agricultural research and development as a result

of top-down approaches and, importantly, privatization during neoliberal regimes, which allowed an ever-growing number of NGOs to enter rural areas with their own agendas. He alleged that NGOs generally had disregarded farmers' concerns while withholding resources.

5 Because ODEP is a pseudonym, a reference cannot be provided for the text in question.

6 While at the national level the call for expanding the market for organic production as well as food sovereignty has come from farmer's associations, more research would be needed to know how much of this call comes from farmers in Norte de Potosí. At the workshops I attended, the *ayllu* leaders (traditional authorities) spoke of these issues and supported the work of ODEP in promoting these ideas among farming communities.

7 For example, I asked Rodolfo, who was overseeing the current micro-irrigation project, whether local knowledge could be applied to the issue of "harvesting" water (*cosecha de agua*). His response was that

over the years when [the community members] didn't have water, they would go up to the top of the mountain and sacrifice a sheep for *Pachamama* in the hopes that she would give them more water. Irrigation is defined by what [current farmers] saw from their grandparents, now [they] have continued with these methods of irrigation but it's not optimal. The irrigation only happened monthly, so in between the plants were very dry. That's not a good situation, that's why we need to change it with training.

8 For example, Teodoro often responded with authority, emphasizing his teaching (even suggesting he was teaching women to cook less familiar vegetables). He was also competitive with his colleagues in his responses: "It's because I am fluent in Quechua that I can *really* teach the classes," he told me, in referring to the other male agronomist in the district, who was still working on improving his language skills and tended to alternate between Spanish and Quechua when talking to farmers.

9 It is possible that, among themselves, farmers distinguished between the knowledge they passed down among themselves and the knowledge they gained from working with the NGO. Since my interviews were mostly conducted in Spanish or translated into Spanish, the same words were used (e.g., *saber, aprender, enseñar*).

10 The agronomists interviewed here often referred to an ongoing process that picked up momentum in Bolivia in the late 1960s and carries on today despite the counter-movement of agroecology and the emphasis in Bolivia on increasing agrobiodiversity.

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The Site of Lead: Social Poisoning in El Salvador

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Abstract: This article explores lead contamination, or *plumbism*, as both an illness and a symptom of social suffering caused by unscrupulous corporations operating with the complicity of corrupt governments and backed up by medical bad faith in El Salvador. I explore how the biomedical model of disease (as a quantifiable phenomenon) is used politically to contest and delegitimize victims of plumbism, privileging economic progress over human welfare. I examine the tensions between official narratives and people's narratives of illness and their relationship to an ideology of industrial development and economic prosperity in El Salvador.

Keywords: El Salvador, lead contamination, social poisoning, corporate irresponsibility, social suffering, medical bad faith

Résumé : Cet article explore l'intoxication par le plomb, ou « plombisme », à la fois comme maladie et comme symptôme d'une souffrance sociale causée par des entreprises sans scrupules, qui exploitent avec la complicité de gouvernements corrompus et se voient appuyées par la mauvaise foi médicale au Salvador. J'examine comment le modèle biomédical de la maladie (en tant que phénomène quantifiable) est utilisé politiquement pour contester et délégitimer les victimes du plombisme, privilégiant ainsi le progrès économique au détriment du bien-être humain. J'étudie les tensions entre les récits officiels et ceux des gens sur la maladie, ainsi que les rapports qu'entretiennent ces récits avec l'idéologie du développement industriel et de la prospérité économique au Salvador.

Mots-clés : Salvador, intoxication par le plomb, empoisonnement social, irresponsabilité des entreprises, souffrance sociale, mauvaise foi médicale

Introduction

According to Trotter (1990), the four culturally shaped sources of lead exposure in human societies are food habits, health beliefs, beauty practices and historical and modern technology. Although lead poisoning is one of the oldest known and most widely studied environmental toxicants, it continues to be an industrial challenge and a health catastrophe around the world (Aufderheide 1993; Gidlow 2004; Markowitz and Rosner 2002; Pérez, Handley and Grieshop 2010; Rambousek 2008; Singer 2011). Lead toxicity can severely affect organs, tissues and the reproductive and nervous systems, particularly in children (Markowitz 2000). It is also known to cause permanent learning and behavioural disorders (Markowitz and Rosner 2002; Nriagu et al. 1996). Its main symptoms include abdominal pain, confusion, headache, anemia, irritability and, in severe cases, seizures, coma and death (Guidotti and Ragain 2007; Ragan and Turner 2009; U.S. National Toxicology Program 2012). *Plumbism* is the term given to the multiple symptoms caused by lead. The World Health Organization claims that more than 10 micrograms of lead per decilitre of a person's blood poses serious health risks. More recently, studies by the U.S. National Toxicology Program and the U.S. National Institute of Environmental Health Sciences (2014) claim that no amount of lead in the body is too small to be insignificant (Rossi 2008). Nevertheless, in the community of Sitio del Niño, in San Juan Opico, El Salvador, some people have more than 50 micrograms of lead per decilitre of blood in their bodies. In the course of a decade of industrial operations, a car battery manufacturing and recycling plant contaminated the soil, water, food, air and people of this community with lead. Owned and operated by Baterías de El Salvador (BAES), this plant came to be known as La Récord, since Récord is the brand name of the batteries it produces. Between 1997 and 2007 more than 7,500 people were contaminated by lead in Sitio

del Niño and now suffer from various degrees of plumbism (De Burgos 2011; Vásque and Yada 2009).

In this article I examine plumbism as a “biosocial” problem—one that is both a bodily illness and a form of social poisoning. Here I define *social poisoning* as the systematic disruption of the social conditions that allow humans to enjoy experiential health—freedom from illness and alienation, the capacity for human development, self-discovery, self-actualization and transcendence of alienating social circumstances (Kelman 1980). Taking a critical medical anthropology approach, I analyze how corporate irresponsibility, government subordination and the “bad faith” of medical institutions caused, and then exacerbated, plumbism in Sitio del Niño. The actions and inactions of these entities are predicated on an industrial development ideology that privileges economic growth over human welfare. *Bad faith* or, *mauvaise foi* in French, is the term Jean-Paul Sartre and Simone de Beauvoir use to describe the situation in which human beings under social pressure adopt false values and disown their innate freedom to act authentically (Childers and Hentzi 1995). Here I explore the cultural conditions that transform plumbism into a politically contested arena where subjective experiences of lead contamination are biosocially suffered by some while politically, medically and legally denied by the powerful who blame the victims for their ill health. Similar cases have been documented elsewhere. A prime example is the work of Renfrew (2013), who in examining the cultural politics of lead poisoning in Montevideo, Uruguay, reveals its link to housing informality, social exclusion and marginality. Nevertheless, he claims that those in power systematically shift responsibility for lead poisoning onto its victims.

Theoretically, I draw from Galtung’s (1969) concept of structural violence and Farmer’s (2004) pathologies of power, or how control, influence and authority can be illness-causing agents. The term *structural violence* generally refers to a form of tacit violence that occurs when some social structure or social institution actually harms people by preventing them from meeting their basic needs, including the inviolable right to health.

In addition, my analysis is informed by Lock and Kaufert’s (2001) argument that “local biologies,” as opposed to universal biology, actually reflect the very different social and physical conditions of people’s lives from one society to another. Similarly, Horton and Barker (2010) convincingly demonstrate that biology differs not only because of culture, diet and environment but also because of disparities in insurance coverage. Thus, my contribution in this article is to examine the role of social poisoning in reshaping the local biologies of structurally vulnerable people (Quesada et al. 2011)

owing to their place of residence and economic status. Schell (1997) argues that in stratified societies the risk of exposure to harmful material is focused on the socio-economically disadvantaged. This exposure has consequences that increase the likelihood of more exposure and more socio-economic disadvantage, thereby increasing social stratification.

Methods

This article is based on four months of participant observation in Sitio del Niño and six months of archival investigation, backed up by more than ten years of anthropological research in El Salvador. In previous visits to this country, I met with community activists and regular residents from Sitio del Niño. In 2007 I heard about their lead contamination tragedy on an Internet radio show. In 2009 I went to the community with a distinct research interest in mind. However, upon arriving, I witnessed the severity of the contamination and expressed to some community leaders my interest in making a documentary film about the lead contamination. They immediately liked the idea, which they saw as an opportunity to gain international exposure for their struggle for health, environmental security and social justice. After I met with my initial contacts, they introduced me to more members of the community and helped me build a wider network of cultural consultants. Through participant observation, I “hung out” in the community and went to many meetings, rallies, court sessions, marches and informal gatherings. In addition, I routinely visited families and community leaders to talk informally about lead contamination and its effect on their physical bodies and their social life. On several occasions, I also visited the local clinic and the parish church, where I spoke to two physicians and the local priest respectively. With a special permit issued by a San Juan Opico judge, I was allowed to enter La Récord factory with a filming crew to see the conditions of the plant and talk to some employees. My Salvadorean-born wife, Cecilia Guillén, and some local residents worked with me as research assistants. They all played a very important role in helping me collect data through interviews and surveys. In total, we conducted 60 semi-structured and 25 informal interviews with Sitio del Niño residents, including 10 community leaders and 15 former BAES workers. The interview questions included issues of community history, employment, community activism, industrial development, environmental safety, illness symptoms and narratives, and theories of contagion, as well as local understandings of the nature and genesis of the lead contamination. The length of the interviews ranged from ten minutes to an hour. Fifty-

three participants were Sitio del Niño residents, men and women from 18 to 70 years old.

This ethnographic study was complemented with extensive archival research that included newspaper articles, as well as governmental, legal, medical and environmental documents related to the claims, litigation and denial of lead contamination. I conducted most of the archival research in San Salvador at the Centre for Appropriate Technology, known by its Spanish acronym, CESTA. In San Salvador I interviewed CESTA's founder and director, world-renowned environmentalist and human rights activist Dr. Ricardo Navarro. I also interviewed two other human rights activists and two BAES apologists, including Roberto Girón, the leading member of the BAES legal defence team. I audio and video recorded most of the interviews during my research and used the footage to make the documentary *The Site of Lead* (De Burgos 2011) and to write this article from the copious field notes I took during my participant observation.

BAES, the Community and Industrial Policies

BAES was founded in 1961 as a small manufacturing plant in a densely populated neighbourhood in San Salvador. In 1995 it moved to Sitio del Niño, in the fertile Zapotitán Valley. BAES claimed it moved to a designated industrial area deemed "not suitable for agricultural production due to its dry climate and poor soil" (BAES 1997:1). Historically, however, this valley has been considered a classic-period Maya agricultural field (Zier 1980). In its more recent history, it was part of a vast plain used as an agricultural and livestock-rearing area. In the 1950s the Zapotitán irrigation project was built in this zone, and in 1956 the National School of Agriculture was also established in this valley precisely because of its fertile soil and optimum precipitation. The arrival of La Récord and other manufacturing plants, however, drastically altered the conditions and the social perception of the landscape. Idioms of progress were used to describe agricultural land as unproductive, while factories and industrial structures were positioned as the embodiments of progress. When the BAES representatives first contacted the community, residents were told that a cookie factory was going to open.

One late afternoon, more than twelve years ago, some friends of the family came to our home to share samples of the cookies the factory was supposed to produce. BAES lied to us because they opened a car battery manufacturing plant. Nevertheless, we were happy because initially it brought jobs. But, later on, it also brought illness and death to our community. [Manuel Carranza, M60¹]

The cookie tale was soon replaced by promises of jobs, which quickly attracted more people to the area. Improvised homes were built near the plant; eventually, many of these homes became permanent dwellings.

In its previous location, La Récord manufactured about 200 car batteries per day. In Sitio del Niño it processed around 1,800 car batteries daily, including recycled and new ones (BAES 1997:1). Quickly, La Récord became the largest recycling and manufacturing plant for automotive batteries in Central America. It also grew to be the largest car battery distributor, expanding its operations throughout Central America and the Caribbean. When it reached full operations, it generated close to 400 direct jobs and up to 2,500 indirect jobs and exported approximately US\$27 million in batteries a year (BAES 1997).

When BAES came to Sitio del Niño, the government of the right-wing party Republican Nationalistic Alliance was in full swing, privatizing state-owned companies and resources, including pension funds (Arias 2008). This trend, however, was not predicated on local initiatives. Since the early 1990s, El Salvador had been under pressure to implement a so-called modernization program financed by the Inter-American Development Bank and the World Bank (Moreno 2005). Driven by the financial interests of these banks and implemented by national governments, the reforms aimed at reducing the powers and functions of the state by promoting the neoliberalization of the economy, including the privatization of state assets and most of the public sector services (Arias 2008; Ibarra 2001; Moreno 2005). As a result, these policies further subordinated the state to corporate economic interests, paving the way for even more abusive relations of production.

The idea of promoting economic growth through "modernization" in El Salvador goes back to the establishment of *zonas francas* (duty-free industrial zones; henceforth ZFs) in the 1970s. In theory, ZFs were designed to modernize the country through the creation of large industrial complexes, introduced as a massive opportunity for jobs creation and the diversification of the economy (Figueroa and Granados 2011). Initially, less than a dozen transnational corporations established their manufacturing plants in ZFs. Presently, however, there are more than a hundred factories (Figueroa and Granados 2011). In practice, ZFs continue to provide ideal opportunities for investors who want to make profits with almost no labour, social, moral or even legal restrictions. Neoliberal economic policies, relaxed labour laws and tax exemptions are only some of the incentives that make ZFs enticing for investors (Angel-Mira 2013). Furthermore, a lack of rigorous operational regulations, and hardly any interest by the authorities in enforcing

them, makes ZFs breeding grounds for labour and human rights abuses (ITUC-CSI 2009).² This is not even remarkable in El Salvador since, for all practical purposes, the aim of establishing ZFs was production, not human welfare (Figuerola and Granados 2011). This is precisely the context in which La Récord established itself in a fertile agricultural area, operated with no restriction and became the centre of a catastrophic set of social relations of productions.

The Contamination

La Récord came to a place with a lovely name: El *Sitio del Niño*. It means “The Site of the Child,” in reference to baby Jesus. However, La Récord uses great amounts of lead for its manufacturing process; this lead slowly and imperceptibly began to poison everyone in the community. [Dagoberto Gutierrez, personal communication, July 12, 2009]

Automobile batteries³ are rechargeable lead-acid devices made of lead plates contained in a bath of sulphuric acid inside a plastic casing. After prolonged use and numerous cycles of recharging, the lead-acid plates deteriorate (Blacksmith Institute 2013). Under the Basel Convention, sulphuric acid and the lead contained in batteries have been classified as hazardous waste. This convention obliges signing countries to ensure that toxic waste is managed and disposed of in an environmentally sound manner. Although El Salvador is a signing party to this treaty, these conventions are rarely followed. Furthermore, neither the Salvadorean constitution nor its Labour Code guarantees free speech to workers in the private sector. Thus, if a worker informs the media about toxic waste in the workplace, the company’s administration can legally fire the worker (Hernández de Menjívar 1995). The following testimonies come from former BAES employees who, although aware of the contamination, had to remain silent while employed at BAES.

Lead and other harmful chemicals were deliberately mismanaged in order to save the company money. There was little or no concern for our health. Rather than properly disposing of toxic waste, we were ordered to dump it on the ground or bury it beneath the topsoil. It was less expensive this way. But the lead quickly started to permeate the water bed and consequently contaminated the wells from which we get our drinking water. (Martín Alfaro, M52)

La Récord would leave tons of lead slag unattended in open spaces, permanently exposed to rain and wind, spreading lead slag all over the community. Millions of lead particles gradually invaded the walls and the roof of the homes near the factory. La

Récord used bio-accumulators, which caused great contamination in the community. As lead plates were melted in large industrial furnaces, lead ash was released and later fell on our community. We breathe what comes out of the factory’s smokestacks. (Marcos Platero, M56)

Indeed, soil containing lead compounds typically turns to dust and becomes airborne. Lead amalgams are then easily inhaled or ingested by humans and animals in a variety of ways, including by drinking lead-contaminated water (Majid and Shahid 2012). According to the U.S. National Institute of Environmental Health Sciences, lead is a naturally occurring metal found deep within the ground (2014). Located there, it is never a health concern; when high concentrations are found in a single and superficial area, however, lead is always a health threat.⁴ The U.S. Geological Survey estimates that the average naturally occurring concentration of lead in soil is 16 parts per million (ppm) (Shacklette and Boerngen 1984). In 1996 the José Simeón Cañas Central American University conducted the first contamination study in *Sitio del Niño*. Eighteen samples were taken from the basins of the Sucio, Acelhuate and Cuaya Rivers to measure the ecological impact of the industrial zone in the Zapotitán Valley. Approximately 88 per cent of samples showed alterations in their chemical and biological compositions. Lead residues were also found but were only slightly above normal levels (Esquivel Orellana 1996). A second study conducted in 2009 found 134 ppm of lead in *Sitio del Niño*. This study was directed by the Salvadorean Centre for Nuclear Research and Applications and the Salvadorean Office for the Defense of Human Rights (Campos, Yada and Vásquez 2009). A more thorough exploration, conducted between 2010 and 2012 by experts from the Salvadorean Ministry of the Environment and the U.S. Protection Agency and Centers for Disease Control and Prevention (CDC), initially found that some areas in *Sitio del Niño* have up to 400 ppm of lead. However, its conclusion revealed a more nefarious aspect of the toxic legacy. Some soil samples collected near La Récord tested as high as 30,000 to 40,000 ppm of lead (MARN 2012). This gradual accumulation of lead and the reported plumbism epidemic suggest that, before the arrival of La Récord, the concentrations of lead in this area probably did not deviate from naturally occurring amounts. Table 1 shows various levels of physical contamination and the ways people perceive such levels in terms of types of soils.

Initial Narratives of Lead Contamination

Catholic priest Father Julio Mendoza (M52) told me that when he first came to *Sitio del Niño*, people did not

Table 1: Physical measurement and popular perceptions of contamination

Year	Parts per Million (Lead)	Perceptions of contamination
1996	Between 16 and 20	Relatively normal
2009	Over 134	Contaminated
2010	Over 400	Very contaminated
2011	Between 30,000 and 40,000	Over-contaminated

think critically about health and death: “Most would conceive both subjects as matters of God but not as issues of social or economic circumstances.” All this changed when, in January 2005, Patricio Rivas, a lay minister, told Father Mendoza a gruesome story about a four-year-old boy who had died in Sitio del Niño who had appeared to be strangely dehydrated, almost to the point of desiccation. Mendoza suspected this was not a natural death but one triggered by irresponsible industrial operations. The following testimony summarizes Mendoza’s participation in helping initiate the community activism that led to two central events: the shocking discovery of thousands of people irreversibly contaminated with lead and a unique and transformative episode in the political history of El Salvador, discussed later.

Initially, the death of the desiccated boy was regarded as a natural death. As a priest, however, I am aware of the multiple social problems in my parish. So, after I learned about that horrible death, Rivas and I went to inspect the surroundings of La Récord. Almost immediately, we discovered that all metal structures near the factory, including barbed wire and fences, were corroded. I was among the first few individuals who made the connection between people’s ill health in the community and La Récord. As both interest and preoccupation with lead contamination grew, we organized a local environmental committee. It started with four people, but it soon grew larger, to around 50 members. We called it the Ecological Committee. This led to widespread community activism by several hundred people. One day, however, engineers from La Récord came to see me in my parish and offered me \$123,000 to dissolve the environmental group. They didn’t shamelessly try to bribe me; rather, they told me that the money was for a potable water project in the community. Additionally, they also offered me \$75,000 for any other project of my choice. Insulted by their immoral proposal, I told them to leave my parish immediately. They left but later retaliated. In June 2006, Rivas received several death threats. Frightened, he left the committee and fled the country. The same month, my brother and I were coming home from a meeting in preparation for a huge demonstration against the

factory’s contamination; suddenly, a man in a car that had been following us started shooting at us. Miraculously, we escaped unhurt. After that incident, I continued to make people more aware of the seriousness of the contamination, including during Sunday mass. Everyone in the community understood that the factory was contaminating the impoverished but not the healthy. We organized several big marches, and people would bring banners with anti-contamination slogans. On several occasions, some even brought dead desiccated animals they found around the factory. The contamination started to get national notoriety. Unfortunately, the same year, I was transferred to another parish by my superiors. [Personal communication, August, 12, 2009].

When people started airing concerns about toxic lead pollution, not everyone in the community was ready to blame La Récord. There was resistance, especially from people who worked at the factory or depended on it financially. Some would even organize small demonstrations in support of the factory and in defence of their employment. Eventually, however, this support withered away, as it became increasingly evident that the issue was no longer just a matter of jobs but one of health, life and death. Many workers at La Récord and members of their families started to experience ill health from lead exposure and conceived the contamination in a new light⁵.

In September 2005 a second and more militant environmental committee was formed. It came to be known as the Movimiento sin Plomo (MSP), Spanish for “Unleaded Movement.” One of its most prominent leaders, Mejía (M34), became an important cultural consultant in this study. After I met him in 2009, I quickly learned that autobiographical narratives were central for the expression of lead contamination as a form of local perceptions of social suffering. Similar to Kleinman and colleagues (1997), these leaders defined social suffering as the whole assemblage of human problems that result from what political, economic and institutional power does to people. However, because it was related to lead contamination, they thought of it as a form of social poisoning. Under the auspices of these two environmental groups, broad ideas of the harmful effects of lead on humans, animals and the environment became part of everyday conversations. As more people in the community started suffering from “unfamiliar health problems,” the idea that lead from La Récord was making them sick became a prominent explanatory model.⁶ Soon, community leaders discovered that a great number of children were sick with rare and comparable symptoms. In July 2009 Mejía told me:

Ever since we moved into this area, our son started having repeated abdominal pains. But physicians couldn't tell us what was wrong with him. He had no parasites or any other apparent cause. At that time, we didn't suspect it was lead contamination. However, much later we realized we had serious health issues in the community when a significant number of children started complaining from unexplained but recurring symptoms. The most common ones included nosebleeds, nausea, vomiting, headaches, bone aches, diarrhea, skin rash, abdominal pain, respiratory problems, hyperactivity and learning disabilities. Naturally, we sought medical help and made the connection between lead contamination and our deteriorating health.

Children are particularly susceptible to lead poisoning because they go through phases of rapid growth during which the effects of lead on cellular functions are particularly severe (Markowitz and Rosner 2013). Other factors include their tendency to place toys and other objects, which could contain lead or lead-contaminated dust, in their mouths, as well as living below the poverty line in older housing and being closer to the ground than adults. As the most vulnerable members of the community, children became the first victims of lead poisoning. At this point, community leaders realized plumbism had become an epidemic. Brown (2007) argues that organized social movements are crucial in recognizing and acting to combat environmental diseases. They help overturn dominant epidemiological paradigms by changing the unilinear direction of policy-making and bringing new perspectives to health and the environment, as well as to the relationships among people, knowledge, power and authority.

Medical Denial and Community Resistance

By November 2005 the number of children suffering from plumbism had drastically increased. In the span of three months, the epidemic went from approximately 12 to over 70 documented cases. A large number of children were taken to the local clinic for lead-related complaints; there, patients noticed unusual clinician behaviour. Similar to the medical bad faith⁷ described by Scheper-Hughes (1993) in Brazil, medical personnel blatantly diminished, dismissed and denied lead contamination as the source of illness. The following testimony of such refutation is one of more than 20 cases I gathered during the study.

I took my two children to the clinic because they had respiratory problems and nausea. I told them I was suspicious of the lead contamination. But both the

nurse and physician told me that we were all sick because we burn plastic when incinerating garbage. They were willing to accept all sorts of possible explanations, except lead. They tried to dissuade us from making any connection between our sickness and lead contamination. [Marta Jimenez, F27]

This initial dismissal was not an isolated incident. The number of instances in which medical personnel systematically discounted plumbism increased, as did the number of people claiming to suffer from it. Patients became distrustful of local medical personnel. According to an MSP leader, Emilio Comayagua (M59), these denials were part of a government cover-up. "They are protecting BAES, not the community and its people," he said. For Benjamin Cuellar, director of the Central American University's Human Rights Institute, a government cover-up was not a surprise since, in El Salvador, the rules of the game privilege a few and harm the majority. "In this country, the government is tough with the impoverished and meek with the rich. The economic privileges of a few people override the health rights of millions" (Cuellar, personal communication, August 8, 2009). Rather than meekly accepting the initial diagnosis that denied lead toxicity, both the Ecological Committee and the MSP started an educational campaign. As MSP leader Mejía put it, "We taught people in our community that lead is a heavy metal that our body doesn't need; therefore, it is harmful to our health." People's understanding of the pathological scope of plumbism increased; for example, Manuel Vaquerano (M63) told me that, in addition to the worsening of their own health, lead contamination was affecting their food and animals. "For example," he related,

I have three cows. Before [the lead contamination] they would get pregnant easily. Nowadays, however, three, four or five moons pass by and they don't get pregnant, unless I spend money to ensure they do. All this is caused by the contaminated grass and water we feed our animals. [2009]

A 2013 study, conducted by the School of Biological Sciences from the Salvadorean National University, found that the milk from at least six commercial farms operating near La Récord is contaminated with lead (Guillén-Paredes 2013). Furthermore, during my research, some residents reported that every day many species of birds and pets are found dead near the factory. At one point, the contamination was so unbearable that every morning people could actually see the fields covered by a cloud of grey dust.

Every morning we can sense the acidity in the air coming from the La Récord factory. It comes and goes with the wind. The nasty odour suffocating us is coming from La Récord. Therefore, our health problems are clearly caused by the contamination. Night and day the plant sends out poisonous gases through its smokestacks. [Mario Morales, M59]

Marta Domitila (F31) told me that because her home was near the factory, she used to keep her children inside her house day and night. Alicia Martinez (F28) stated that the worst experience was feeling powerless to stop the contamination. "It is painful to see my own children suffering hopelessly. We are all ill here and that's because we are impoverished people." Although not everyone in the community was sick with plumbism, most families had at least one member affected by it. Nevertheless, local physicians and nurses continued to insult patients who complained about lead. Sick children and adults were routinely ridiculed by nurses and physicians for blaming lead as the cause of their illness. "I went to the clinic because I had incessant headaches, nausea and anemia, but as soon as I started explaining how I felt, a nurse laughing at me said: 'Oh no, now you'll tell us that you are sick because of lead poisoning'" (Maritza Martinez, F26).

Some physicians would laugh at lead claims and explicitly tell their patients that all lead contamination claims originated more in their imagination than in a factual poisoning.

Once a physician laughingly told a very sick woman, 'I bet you are going to tell me that lead is making you sick.' He even pointed his index finger at his head and said, 'Lead is only in your mind.' Another physician told me he didn't know why we kept complaining so much about lead if anyway lead is all around us. 'Look,' he said, 'this tile floor contains lead, the paint in your walls has lead, some kitchen utensils you use have lead and so on.' I think physicians and nurses were simply following orders. It was obvious that, behind the physician's attitude, the Ministry of Health was intentionally separating our sickness from the factory's operation. [Mejía]

Navarro said in an interview that it is not a secret to anyone that medical authorities were acting in complicity with the factory owners. As Navarro put it, "Nurses and physicians as public servants were simply complying with government policies geared at protecting big business" (July 12, 2009). He also claims that the connection between BAES and the government is not only institutional. It is also a personal one:

BAES used to be owned by the former minister of finance, Miguel Lacayo. He began to recycle car batteries from all over Central America, even from Colombia. Although recycling may sound environmentally friendly, they were not interested in the environment at all. Their goal was to make profits. [2009]

For decades, BAES has benefited from the generalized protection provided by ZF laws. Highly permissive industrial policies provide the political conditions for the total absence of any form of social responsibility. Therefore, La Récord's industrial lead contamination is only epiphenomenal to how most manufacturing industries operate in El Salvador and elsewhere. Although Sitio del Niño is only one example, denials of industrial lead contamination are commonly found around the world. In the United States, for example, Markowitz and Rosner (2002) demonstrates how the chemical and lead industries purposely deceive people about the dangers that their deadly products present to workers, the public and consumers. In another study, Warren (2000) argues that lead poisoning insidiously permeated U.S. culture and the bodies of its citizens. Similar cases have been documented in Africa, Asia, Europe and South America (Nriagu, Oleru, Cudjoe and Chine 1996). In Argentina, Auyero and Swistun (2009) explore the tragic environmental and human consequences of unregulated industrial growth. They expose the lived experiences of environmental suffering caused by a highly polluted river that carries the toxic waste of tanneries and other industries, a hazardous and largely unsupervised waste incinerator and an unmonitored landfill. Therefore, the Salvadorean cover-up is part of a global trend designed to maximize earnings industrially, even at the expense of human health and lives. In the same way that lead causes bodily disturbances, corporate irresponsibility, medical bad faith and government complicity equally poison people and cause social suffering. Lead is the immediate cause of plumbism, but social inequality is its ultimate etiology (Farmer 2004).

The Subjective versus Objective Signs of Disease

Although synonymous in popular usage, the terms *illness* and *disease* are distinct concepts (Eisenberg 1977; Fábrega 1999; Kleinman, Eisenberg and Good 1978; Kleinman, Das and Lock 1997). *Illness* is defined as a feeling of not being well, as a subjective experience (Good 1994). *Disease*, on the other hand, is defined in terms of what the scientific paradigm regards as an objectively measurable physical condition, that is, broken

bones, tooth decay and degenerated tissues, among other corporeal signs. Good (1994), however, argues that disease—the presumably objective description of illness—belongs to the culture of biomedicine, and that culture is not only a means of representing disease but is also essential to its very constitution as a clinical reality. Using this conceptual distinction, BAES executives and Salvadorean medical authorities systematically disclaimed lead complaints, alleging lack of objective evidence. In most cases, lead complaints were seen as subjective interpretations of other kinds of medical issues. Unfortunately for patients, the physicians' refusal to recognize lead as the cause of illness translated into a lack of adequate health care. There seems to have been an unwritten rule of "no proof, no treatment." The irony is that, in their bad faith, physicians were not interested in testing lead levels in patients' blood. In a community where everyone depends on a universal but precarious health care system, this is tragic. Some physicians, however, did not entirely deny the patients' illness. Rather, they contested the etiology of the complaints, not the existence of symptoms. Consequently, patients received only palliative care. Treatment of plumbism was systematically and officially denied.

I went to the clinic for lead-related problems, nausea, abdominal pain and headaches, but I was given no medicine. I was told to buy some acetaminophens, and that was it. [Mario Romero, M26]

My ten-year-old son was very healthy, but around a year ago, he started suffering from nosebleeds, abdominal pain and even seizures. I think it is due to the lead contamination, but no medicine has been given to him at the clinic. They just told me that my son was probably sick with parasites. [Araceli Morán, F27]

BAES lawyer, Girón, also argued that lead contamination claims were unsubstantiated by any scientific evidence and that subjective claims do not prove anything:

The presumed epidemic of people suffering from lead contamination in Sitio del Niño does not exist. It does not exist simply because there is no qualified evidence that scientifically proves it. It is possible that some people are being afflicted by illness, but that is not necessarily connected to the presumed lead contamination. [Personal communication, 21 July 2009]

To receive proper medical care, the patients' sensory and emotional distress associated with lead had to be scientifically proven to physicians, lawyers and politicians. Illness, as subjectively experienced by suffering

bodies, seemed less important than the medical validation of bodily and emotional pain. The conventional dichotomy between illness and disease was conveniently used to invalidate lead complaints. To be valid, pain needed to be "objectified" (Handler (1988)). For about two years, BAES and medical authorities were able to delegitimize lead contamination claims. As Eisenberg (1977) argues, patients suffer from illnesses; physicians diagnose and treat diseases. Narratives of objectivity as the defining feature of allopathic truth were suitably manipulated by dominant differentials in political, medical, economic and legal power. Intuitive medical knowledge about possible causes was rendered irrelevant in the face of non-medical interests, which determined not only the diagnosis and treatment of plumbism but also the eligibility of patients to determine the etiology.

Tired of mistreatment and systematic denial, on 29 March 2005 community representatives filed a formal complaint at the local clinic. The document stipulated that many of the illnesses they were suffering from were ultimately caused by the industrial operation of La Récord. "This factory," the document stated, "is objectively making us sick by contaminating with lead our air, soil, water, food and bodies." Leukemia, kidney failure, urinary tract infections, persistent headaches and behavioural problems were listed as major health problems. The names of three individuals believed to have died from lead contamination were also included in the document. In the same spirit, on 30 March 2005, people from Sitio de Niño came to the office of the Foundation for the Study of the Application of Law in El Salvador to report violations of their right to health and environmental security. They claimed that hundreds of people in the community were suffering from several health conditions caused not only by lead but also by the toxic emissions of sulphuric acid, cadmium, zinc and other metals used by La Récord.

As the health of more children and the elderly gradually deteriorated, community activism increased. Local leaders started to gather concrete, external signs of plumbism and demanded that the government initiate a free blood testing program. As a result of pressure from national and international environmental and human rights organizations and the Salvadorean Catholic Church, the Ministry of Health with the assistance of the CDC collected the first blood samples in the community in 2005. In its effort to rebuild its public image, BAES claimed that as part of its social responsibility policy the company was going to cover all the expenses for this blood testing. Despite the immediate benefit of the tests, many residents felt what Rajak (2011) describes

Table 2: Sample of Blood Test Results

Name	Sex	Age	Date of test (D/M/Y)	Blood lead concentrations (mcg/dl)	Epidemiological link	Diagnosis	Treatment
Angela Gomez	F	11	2/2/2005	55.5	Lives near a battery factory	Lead contamination	EDTA* for 4 days
David Velasquez	M	26	2/2/2005	41.89	Lives near a battery factory	Lead contamination	None
José Martinez	M	24	22/4/2005	41.2	Lives near a battery factory	Lead contamination	None
Roberto Cerna	M	25	26/4/2005	40.86	Lives near a battery factory	Lead contamination	None
José Cruz	M	34	26/4/2005	40.80	Lives near a battery factory	Lead contamination	None
Osmeri Ticas	M	10	23/4/2005	40.41	Lives near a battery factory	Lead contamination	None
Marvin Caseres	M	7	23/4/2005	22.20	Lives near a battery factory	Lead contamination	None

* *Ethylenediamine tetraacetic* acid oral chelation treatment.

as the ambivalence behind the apparent benevolence of “corporate social responsibility,” particularly if the gift only strengthens the authority of the giver over the recipient. Nevertheless, many people, including La Récord’s employees and their families, were tested. The samples were sent to an independent laboratory in Mexico City, and although these tests confirmed the presence of lead in the blood of many people altered results were given to patients by the Ministry of Health. Furthermore, it officially stated that, according to a collaborative study with the CDC, there was no conclusive evidence that La Récord was contaminating the community with lead (Ávalos 2008). Manuel Rodríguez, a researcher from the CDC, was notified about the presentation of the study and the inaccurate results. He then quickly and publicly denied any participation in such a study (Ávalos 2008; Cabrera 2007). In fact, he explained that members of the CDC had visited El Salvador in 2005 but only to train medical personal on how to assess lead contamination.

In 2006, once again owing to national and international pressure, the community was finally able to obtain the actual results from their first blood tests (see Table 2). At least 120 children were seriously affected by lead poisoning. Community leaders reported that, in addition to physical signs, some children also presented serious neurological damage and learning disabilities. “These health conditions are not found anywhere in this country. There isn’t any place in El Salvador where 50, 100 or even 200 kids with these health issues are found” (Mejía, M34).

“In Sitio del Niño, we have children who have more lead in their blood than the number of years or months they have lived. In fact, several women in the community have had miscarriages” (C. Evangelista, F26). According to Gidlow, “at lower levels lead has been associated with miscarriages and low birth weights of infants ... That is why,” he claims, “to protect the developing fetus, in some industrialized countries legislation for lead workers often includes lower exposure criteria for

women of reproductive capacity” (2004:77). According to the American Pediatric Academy, anything beyond seven micrograms of lead per decilitre of blood causes irreversible neurological damage (Advisory Committee on Childhood Lead Poisoning Prevention 2000; General Accounting Office 1999; Rogan, Dietrich, Ware, Dockery, Salganik, Radcliffe, Jones, Ragan, Chisholm, Jr. and Rhoads 2001). In this regard, Salvadorean environmental activist Navarro claims:

The amounts of lead found in this community are, by any analysis, regulation or measurement, totally harmful to any person. Can you believe that some children here have up to 50 micrograms of lead? That is why La Récord is by all accounts committing a crime in this community. [Personal communication, July 12, 2009]

Although saddened by the results, almost everyone I interviewed talked to me with expert knowledge about their blood tests. Through their social suffering people had also been politically and medically educated about lead contamination. Many people were now mindful of the *immediate* and *ultimate* causes of their social suffering, lead contamination and social poisoning. They saw lead particles only as the immediate cause of their maladies. The ultimate cause was embedded in their social vulnerability. People from Sitio del Niño became aware that in their quest for health and justice, they had to be strategically assertive and use a particular medical, legal and political language that engages both ideas and actions. In a case comparable to Sitio del Niño, Renfrew (2013) describes how lead-poisoned people in Uruguay use their structural vulnerability to urban environmental hazards and their status as lead victims to assert their humanity and rights.

Resistance and Transformation

Once community leaders learned the government had withheld the blood test results, there was no doubt in their minds that medical negligence was part of a state

cover-up. Medical dismissal was not gratuitous, since both the government and BAES wanted to avoid liability. The denial was so strong that even after substantiated evidence was obtained, BAES and government officials continued to disown it through legal ruses and medical bad faith. Local clinic director Carmelo Bonilla kept denying plumbism by making reference to the false results from the 2005 study and blood tests. BAES's lawyer Girón also used the same study to make the following claim:

In regard to the presumed abnormal levels of lead some residents from Sitio del Niño claim to have in their bodies, we have to say that, according to the result of the 2005 study conducted by the Minister of Health and the CDC, only 3 children, out of a universe of more than 100 that were tested, revealed abnormal levels of lead in their blood. This according to a Mexican scale used to measure acceptable levels of lead in the human body. [Girón, personal communication, 21 July 2009]

Faced with total indifference from both the Ministry of Health and the Ministry of the Environment, people felt they had to take to the streets to demand the unthinkable—the immediate closure of La Récord. With this goal in mind, protest activities intensified in the community. “WE WANT JUSTICE. LEAD POISONS AND KILLS” became the most important aphorism in a permanent campaign seeking health and social justice. Support from environmental and human rights organizations, as well as the Salvadorean clergy, contributed to pressuring the central government to take immediate action. One of the most significant events the community organized was a 30-kilometre march from Sitio del Niño to the Presidential House in San Salvador. On 12 September 2007 more than five hundred people, including children and the elderly, participated. According to Mejía, this march was an action born of desperation. “We have no one to go to for help. The Attorney General, Félix Garrid Safie, said that without any substantiated proof he could not do anything about it” (Mejía). A formal petition to close down the factory was delivered to President Antonio Saca, who also defended the factory, arguing that jobs would be lost (Castillo 2007a). Given the government's reluctance to help the community, residents from Sitio del Niño took the case to the United Nations. The petition to close the factory was endorsed by El Salvador's human rights ombudsman Oscar Luna on behalf of the hundreds of people affected by La Récord's lead (Castillo 2007b). Together with the community, Luna argued that as long as La Récord continues to operate, it will continue to contaminate. He also claimed the state is responsible for the

well-being of its people and, therefore, “accountable for any physical harm that could occur to its citizens” (Castillo 2007b). Luna was the first government official to refer to La Récord contamination as an “environmental emergency” (Orellana and Escobar 2007). For the first time in the history of El Salvador, the ombudsman's significant degree of independence was used to legitimately represent the interests of the public, not the government or big capital. Luna diligently investigated and addressed reports of industrial negligence and human rights violations.

In an unexpected turn of events, on Monday, 24 September 2007, the Minister of Health, Guillermo Maza, finally ordered the indefinite closure of La Récord. To the disappointment of many, however, La Récord was not closed on grounds of contamination. Rather, the legal ruling stated that the factory was closed for not having the required permits to operate, as it had been operating illegally for nearly three years. Nevertheless, for many people, shutting down the factory was only a partial victory. The sick continued to be in great need of medical care, and 32 thousand tonnes of lead slag had to be safely removed from the factory.

After La Récord was defunct, the legal effort to deny the contamination continued. Addressing the Salvadorean National Assembly, BAES general manager Samuel Martino argued that, before the arrival of their manufacturing plant, the land in the industrial zone was already contaminated (Cabrera 2007). By late 2007 the attorney general had received information on over a thousand individual cases of lead poisoning. In July 2008, BAES engineers Hugo Reynaldo Trujillo Díaz, Arturo Marenco Carballo and José Edgardo Brito Menéndez were criminally charged with several accounts of aggravated environmental contamination (Morán 2012). The office of the attorney general said that if found guilty, BAES would have to pay US\$3,964 million for damages to the environment. No mention of harm to people was made. BAES CEO and executive members José Ofilio Gurdíán Lacayo, Ronald Lacayo and Sandra Lacayo de Escapini, respectively, are still fugitives and wanted on several counts of environmental contamination.

The election of the first left-wing government in El Salvador in June 2009 brought politically favourable conditions for victims of lead contamination. Mauricio Funes was elected president largely for his promise of social and economic justice. His minister of health, María Isabel Rodríguez, shortly after taking office, created a special commission to investigate La Récord's lead contamination. In July 2009 the community organized a second march from Sitio del Niño to the Presidential House in San Salvador. A formal demand for the

removal of more than 32 thousand tonnes of lead slag from their community was their main objective. In October 2010 President Funes officially declared a state of “Environmental Emergency” in Sitio del Niño. The Ministry of the Environment and Natural Resources (MARN) announced a list of measures to aid residents in the affected community⁸, including providing urgently needed specialized health services, paving the area surrounding the shuttered battery factory, closing polluted wells and providing potable water. Lastly, the National Assembly passed a bill in 2010 allowing the removal of lead slag. As noted by Fortun (2001), disaster and tragedy are usually a turning point in environmental legislation. But the damage caused by lead contamination is mostly irreversible. Plumbism in El Salvador is a disease that affects only the local biologies of Sitio del Niño residents. Because of their place of residence and low economic status, their local biologies are at the mercy of the structural vulnerability that makes them sick and causes their social suffering.

Conclusion

This article has explored the ways in which plumbism as a medical idiom of victimhood—suffering from the injurious actions or agency of others—was claimed, contested, challenged, denied and legitimized through subjective experiences, medical language, political ideology and even legal ruses. I have demonstrated that when economic privileges override ethical and medical values, people and their suffering acquire secondary importance.

Owing to differences in political and economic power, the conceptual dichotomy between illness and disease was strategically used by the state, vis-à-vis medical professionals, to delegitimize victims of plumbism and to justify an industrial culture that privileges profits over human welfare. Not only did the lethal combination of corporate irresponsibility, medical bad faith and government subordination to corporations make people victims of plumbism, but people also suffered from the social poisoning of institutional deceit regarding industrial hazards, the medical denial of appropriate health care and the state’s unwillingness to deliver justice. Plumbism in Sitio del Niño is not just the subjective feelings of a poisoned body but also the reification of social inequality as a pathological condition (Farmer 2004). Plumbism is simultaneously both the *cause* of subjective suffering and the *effect* of objective social conditions. It is an etiology of bodily sickness and a symptom of social pathologies embodied in the bad faith that permeates corporate, medical and government institu-

tions. Profound social and economic disparities in El Salvador are in themselves a form of social poisoning because they cause disease, illness, social suffering and untimely death among the dispossessed. In a society plagued by enormous political and economic discrepancies, power is also a pathological agent (Farmer 2004). In Sitio del Niño, plumbism is not a disease only in people’s bodies as a singular, discrete biological organism with an individual psyche (Lock and Farquhar 2007). Rather, it is a form of social poisoning suffered almost exclusively by the impoverished who live and work in contaminated areas. Warren (2000) defines childhood lead poisoning as a disease of poverty. Those who are structurally vulnerable experience social epidemics daily that are rooted not only in micro-organisms but also in macro-political and economic systems that are produced, reproduced and perpetuated by structural violence (Farmer 2004; Galtung 1969). Gutierrez claims that although the issue of poisoning in Sitio del Niño clearly involves lead, there is another kind of poisoning, one that is social, political and economic:

The relationship between the corporation and the government or, more precisely, between the market and the state is a poisonous one. La Récord’s contaminating activities were possible precisely because the state was permissive; and this permissiveness coincides with the neoliberal philosophy which establishes that the market is king and the state is subject. [Gutierrez, personal communication, 12 July 2009]

Thus, any government that subordinates itself to the market, privileging profits over human health and life, is, by all accounts, a toxic agent and part of a larger pathological configuration that is the ultimate cause of illness and human social suffering (Farmer 2004). As this article has demonstrated, to understand social poisoning we must never separate moral, political, economic and medical issues. Conceptually separating them is an analytical fallacy because in everyday life they are inseparable. Thus, plumbism as the “embodiment” (Krieger 2005) of economic and political inequality—itself a social epidemic—obligates people to seek help outside the medical realm and in the political arena as a form of healing and social protest. The history of El Salvador is paved with government good intentions, not actions. Thus, despite multiple pre-electoral promises, people from Sitio del Niño continue to live in a highly contaminated environment, struggling to regain their health, stolen from them by progress and modernization.

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Notes

- 1 The M and F indicate male and female, respectively, and the number indicates the age of the interviewee.
- 2 2009, the *International Trade Union Confederation-Confédération syndicale internationale (ITUC-CSI) Annual Survey of Violations of Trade Union Rights* reported multiple cases of severe discrimination against unionized workers, their union membership and labour activities in El Salvador.
- 3 Invented in 1859 by French physicist Gaston Planté.
- 4 These conditions are typically the result of human activity, particularly mining, manufacturing and the burning of fossil fuels.
- 5 In a primarily African American town, in an area of southern Louisiana informally referred to as the "Chemical Corridor," Singer (2011) has also examined how people conceive of environmental health risk in ways that allow them to handle the potential conflict between access to needed employment and the local presence of industrial polluters.
- 6 Disease as an explanatory model was first introduced by Arthur Kleinman (1980).
- 7 Bad faith, or *mauvaise foi* in French, is what existentialist philosophers Jean-Paul Sartre and Simone de Beauvoir use to describe the phenomenon where human beings under social pressure adopt false values and disown their innate freedom to act authentically.
- 8 More than eight tonnes of contaminated corn crops were removed to avoid its commercialization (El Diario de Hoy 2010).

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Targets of Salvation: Ovumuila Women with Tuberculosis and the Potential of the “Unreached” in Medical Mission

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Abstract: The colonial history and political economy of Angola through years of conflict have marginalized the Ovumuila, a proportionately small ethnic group living primarily in the southwestern corner of the country. Yet it is precisely this constructed “backwardness” that has, ironically, rendered them targets of the contemporary colonialist enterprise of medicine and evangelical Christian mission. Drawing on ethnographic fieldwork at a rural clinic, this article discusses how Ovumuila women with tuberculosis are characterized as “unreached” and “at risk,” thus providing the impetus for an incessant and penetrating agenda of salvation.

Keywords: tuberculosis, Angola, targets, medicine, Christianity, risk

Résumé : L’histoire coloniale et l’économie politique de l’Angola lors des années de conflit ont marginalisé les Ovumuila, un groupe ethnique relativement minoritaire habitant la région sud-ouest du pays. Or, il est ironique que leur présumé « retard » ou « isolement » soit précisément ce qui les a désignés comme la cible de l’entreprise coloniale contemporaine sous forme de missions médicales et évangéliques chrétiennes. À partir d’un terrain ethnographique dans une clinique rurale, cet article examine comment les femmes Ovumuila atteintes de la tuberculose sont caractérisées comme « à risque » et « non contactées », entraînant un programme des plus soutenus visant à assurer leur salut.

Mots-clés : tuberculose, Angola, cibles, médecine, Christianisme, risque

Introduction

The meaning accorded to tuberculosis (TB) as an illness has differed across time and space and is continually in flux, dynamic and reinterpreted daily. TB therefore is, and perhaps always has been, more than the sum of its bacterial parts, and it is currently becoming an increasingly problematic infectious disease worldwide. As Inhorn and Brown point out, “infectious disease problems are both biological and cultural, historical and contemporary, theoretical and practical” (1997:32). Yet the implications of such categorizations as they become lived necessities attending to more complicated confluences—how bodies, illness and even treatments become metaphors of historically situated tropes, indexing forms of orthodoxy and orthopraxy through the contemporary salvific task of disease eradication. Encounters between practitioners of biomedicine and Africans (as a notable and monolithic target of the WHO’s Stop TB campaign) are instructive in attending to these confluences.

In this article I take as exemplary the illness experiences of 12 Ovumuila women with TB who have chosen to receive treatment at a rural clinic in southwestern Angola. TB in post-conflict Angola is a considerable problem, reflected in the most recent WHO (2013a; 2013b) statistics that state the prevalence of the disease per 100,000 people to be 413, whereas the regional sub-Saharan African number is 293 per 100,000. The women I talked with about TB varied in age from 30 to 60 and in a variety of ways appropriate to their ages. All of them cared for large, extended families, cultivating crops or selling produce in nearby markets. Some stayed at the clinic’s patient housing provided for those receiving TB treatment, and some walked the many miles to the clinic to receive medication every week. Yet their choice to seek treatment at the clinic allowed them to become enfolded within a complex mire of medicine and mission in which their Ovumuila ethnic label enables their transformation from an isolated rural people

viewed as “backward” to targets of medical and Christian conversion.

They are described as “unreached” by Christian missionaries, who consider their isolation as preventing them from hearing God’s word, and “at risk” for TB by both the WHO and the clinic’s medical staff, who implement infectious disease control programs in the area. What is more, the potency of these metaphors results from Angola’s history, geography and spatial dispersion of Portuguese colonialist influence—which includes contemporary medical practice and evangelical Christian mission presence—whereby the Ovumvila have been consistently peripheral to any external agendas regarding resource extraction, economic development or the project of modernization. The irony, then, is that years of marginalization and historical dismissal of the Ovumvila by the Portuguese and, later, by “modern” and “assimilated” Angolans, enable the Ovumvila to be reclassified as targets of Christian mission organizations (as tantalizingly “unreached”) and of the infectious disease eradication agenda of the WHO. This trope of “targetedness” cannot be understood without attending to its complex embedding within Angola’s colonial history, its unique political economy, the effects of assimilation policies resulting from years of devastating war, and the situatedness of the clinic within medical discourses of TB.

Background

Within Angola, there are three main ethnolinguistic groups or clusters, which make up nearly 75 per cent of the population: Ovimbundu, Mbundu and Bakongo (Hodges 2004). The largest single ethnic identification in Angola is Ovimbundu, representing about 37 per cent of the population (Warner 1991). The clinic is situated in an area populated by the Nyaneka-Humbe (of which the Ovumvila are part), an ethnolinguistic grouping comprising only three per cent of Angola’s total population and concentrated in Huila province (Warner 1991). The clinic is located in southwestern Angola approximately 40 kilometres south of Lubango, the capital city of Huila province, along the main highway connecting Lubango and Namibia to the south. The clinic is surrounded by several groupings of huts/houses comprised of family units and their corn fields. Supplies other than what can be grown or harvested on-site must be accessed by foot or taxi at small markets along the highway or at the bigger centres of Lubango to the north or Chibia to the south, both of which have government-run hospitals and clinics.

As it is a private clinic run by an evangelical mission organization, patients were charged for services. During

my fieldwork in 2008, one doctor was on staff working three days per week, as well as a handful of nursing staff, ancillary staff and “TB specialists,” the Community Health Team, who have received specialized training and education on TB. There are about 250 patients registered in the TB program each year. Because many patients travel great distances (often on foot) to receive treatment at the clinic and the treatment period is quite lengthy, temporary housing is available in proximity to the clinic, thus artificially increasing the population of the community.

The region of “southern Angola,” of which Huila province is a part, maintains a sort of distinction from the rest of Angola; its unique history is imbricated in the area’s particular ecology and geography, population distribution and shifting global markets; the Nyaneka-Humbe of southwestern Angola encountered the spectre of Portuguese colonialism less acutely than those in other parts of the country. Southern Angola has few natural or human resources, consisting of the northern marches of two deserts, the Namib and the Kalahari, separated by a formidable escarpment (Clarence-Smith 1979), while the northern regions of the country, in contrast, are resource-rich and distinguished by significant rainfall and forest. The escarpment is at its steepest to the west of Lubango, where the Huila plateau falls nearly 1,500 metres straight down to the coastal plain 150 kilometres from the Atlantic Ocean at the port of Namibe, nearly due west of Lubango.

The semi-desert coastal plain is sparsely populated, but above the escarpment, in the Huila highlands surrounding Lubango, higher rainfall allows for denser populations. The presence of this swath of semi-desert, the escarpment and the uneven distribution of population have meant that transportation and communication within southern Angola have, historically, been limited (Clarence-Smith 1979). Since their arrival on Angolan shores in the 15th century, the Portuguese stayed on the coast, building fortresses at strategic locations to facilitate the trade of Angolans to Brazil—Portugal’s major colony in South America—to work on sugar cane plantations. Such was the case for the seaport at Namibe, from which transportation networks were restricted to northern and southern routes along the coasts and inland to the escarpment. Therefore, because of the geography of the region, the “colonial nuclei” of Portuguese settlements were restricted and discontinuous.

Wheeler and Pelissier (1971) suggest that up to four million Angolans were taken in the Portuguese slave trade, and military efforts to maintain control of such economic interests meant that between 1579 and the 1920s, scarcely five years went by without an incursion;

the history of violence in Angola has thus been nearly constant since the arrival of Europeans in the 16th century. When Brazil achieved independence from Portugal in 1822 and the slave trade declined, the Portuguese were forced to develop other economic interests to maintain control of their African colony (Wheeler and Pelissier 1971).

As a result, following the abolition of the slave trade, the Portuguese became increasingly attentive to the area inland from their port stations to develop further nationalist interests and to secure a Portuguese foothold on the continent, as other European colonial powers were intent on doing at the time. In particular, there emerged a vision of filling southern Angola with white Portuguese settlers and African slaves to secure the colony for Portugal. Around 1910 Portugal became further interested in the development of a plantation sector based on immigrant labour; this would involve the imposition of taxation and forced labour of Africans (Clarence-Smith 1979). However, both because of the process the Portuguese undertook to achieve these ends and because of the resource-poor landscape, the effects were not as grand as was initially hoped. The shifting cultivation practices of the African groups in the area meant that land was not settled permanently, resulting in the government letting white settlers take whatever land they desired, at its most extreme, suggesting that all Africans would be “exterminated” from the land anyway (Clarence-Smith 1979:80). Though this did not happen in actuality, all the most arable and preferable agricultural land was taken by white settlers.

Between 1920 and 1960, Angola went through an uncomfortable transition from subsistence agriculture to a market economy. A railroad-building rush led to the “opening up” of the interior of the country, its settling by Europeans and the creation of a plantation sector that allowed for the cultivation of coffee, cotton, sisal and corn for export (Newitt 2008). This also significantly altered the relationship of the Portuguese and Angolans, who were now being employed as plantation workers. Whereas the Portuguese had maintained a strong coastal economy through the slave trade with Europe and the Americas, cities in the interior were now being built and settled by European immigrants (Newitt 2008), while agricultural land was increasingly taken and used for growing exportable crops. In this emerging market economy, young adult Angolan men would find employment on plantations or in the cities, shifting the demographics and dynamics of families and social networks (Henderson 1979).

In the 1920s and 1930s, the economy of southern Angola was significantly affected by the Depression, re-

sulting in the complete stagnation of the economy by the 1950s. In the 1960s, with insurrection beginning in the northern parts of Angola, the Portuguese became fearful of new peasant violence and concentrated on creating social and economic changes for Angola, particularly in the south (Clarence-Smith 1979). This meant an increase in health and education spending; increased communication and transportation, including airstrips and paved roads; and a new hydroelectric dam. Lubango doubled its population between 1960 and 1970 and became the main commercial and administrative centre of the province, over Namibe (Clarence-Smith 1979).

The changing economic landscape since the 1920s led to increasing urbanization; employment in the cities subsequently became competitive, imbued with tensions around race and power. As Clarence-Smith suggests, discrimination by European employers toward Angolans “was just one of the ways in which a section of the petite Portuguese bourgeoisie (fishermen, small farmers, petty traders) attempted to maximize their own security at the expense of others” (1979:57). To solidify this security, the Portuguese government in Angola developed an assimilation policy that followed the example of French colonialists in categorizing Africans. This categorization was based on the concept of

assimilation ... that was meant to deal with the competition for urban employment between Africans educated in mission schools, the Afro-Portuguese (those Angolans with both Portuguese and African ancestry) and poor white immigrants ... To become an *assimilado* [someone who is assimilated] a person had to display stipulated levels of education, Portuguese culture and economic independence, criteria that could be raised or lowered to regulate admission into the colonial elite. [Newitt 2008:53]

Almost all Afro-Portuguese and nearly 50 thousand Africans were given assimilated status, forming a new educated elite, separated from the majority of the population. From this group came the leadership of the nationalist movements that would challenge both the Portuguese for independence and the Portuguese nationalist rhetoric supported by Western countries in the 1970s (Newitt 2008). If the Portuguese colonial mandate was as “racially tolerant” as postulated, why did no Angolans hold positions in either the public or private sectors and in the educational system, and why did forced labour, expropriation of African lands and arbitrary arrests and torture continue to exist (Bender 1978)? Somewhat ironically, as Newitt (2008) points out, the formation of an educated, elite, urban nationalist movement striving for independence nevertheless was a

continuation of the Portuguese colonial social distinction of “assimilated” that they were striving to overcome.

After several incursions, independence from Portugal was granted in 1975, but conflict escalated between factions vying for control. Over the course of nearly 30 years, various world powers were also involved (including Russia, the United States, Israel and South Africa), arming Angolan factions fighting first over the merits of communist ideology and later over oil and diamonds. The ethnic landscape of Angola changed dramatically after 1975 and during the nearly 30 years of war which followed. During these years, the population underwent an intensive urbanization process, which meant an unprecedented interaction of people of differing cultural backgrounds living in proximity, vying for employment and competing for the same limited resources (Hodges 2004).

The paradox of Angola within an economic framework, however, is its description as a country endowed the “richest” resources in Africa yet associated with years of conflict, economic decline and human misery, rather than with development and relative prosperity (Hodges 2004). Such assertions foreground the problematic tensions of capitalist promises of “development” and “prosperity” undercut by the dangers of resource “extraction”: Until 2002 Angola was racked by conflict that began after its independence from Portuguese colonialism and was propagated through the exploitation of two of the West’s most precious resources—oil and diamonds. As Renner describes, “the ideological differences that first sparked the war came to reside in the dustbin of history but resource-driven greed and corruption proved to be powerful fuel for its continuation” (2002:6).

In 2002, after nearly 30 years of conflict, the country was reeling from the collapse of its administrative infrastructure, and a bleak economic situation severely compromised any government support for social institutions. Chabal (2008), for instance, notes the interaction of certain factors, whose confluence can be seen to characterize the modern nature of Angola: years of Portuguese rule and its impact on the relationship between ethnic and regional groups, anticolonial and nationalist movements, and the effects of oil wealth. The result leaves postwar Angola with a chronic lack of educational materials and school books, and its hospitals lack sufficient medicines or equipment (Pearce 2005).

The UN estimates the number of displaced persons in Angola to be four million, and after the war ended, a major demographic shift occurred throughout the country to accommodate the movement of these persons (Ayisi 1998). This massive displacement of people, however, has meant that a national Angolan identity has

developed instead of an “ethnic particularism,” most evident with the prominence of the Portuguese language at the expense of African languages (Hodges 2004). The post-independence government adopted the Portuguese language as an instrument of national unity; therefore, it has been (and continues to be) the exclusive medium of educational instruction and the language of the military, subsequently providing a common language for generations of Angolan soldiers. According to Hodges (2004), nowhere else in Africa, with the exception of some island states, has a European language taken up a place of such prominence among the population, particularly owing to urbanization, the expansion of education after independence and the impact of television.

Yet, while this dramatic urbanization was occurring and the Portuguese were manoeuvring further toward Africa’s interior, the Ovumula seem to have been less interested in this project. At one point in the 1930s, in fact, they offered armed resistance to the European takeover of succession disputes, arbitration and judicial functions in Ovumula communities, functions previously presided over by chiefs of clans. An organized group of “social bandits” formed, from within various Ovumula tribes and clans, to abolish what they perceived as European interference. These bandits initially came from the hierarchy of chiefs of surrounding clans and tribes and were eventually joined by escaped slaves and ex-soldiers who assisted in building fortresses to attack the Portuguese. The organization eventually devolved and was defeated by the Portuguese, yet such a form of armed resistance (up until the conflict following independence) was unique in the historical relationship between Angolan groups and the Portuguese (Clarence-Smith 1979).

The war left the southwestern portions of the country (poor as they were in resources and subject to the exigencies of a difficult geography) relatively untouched; the assimilation project, too, was less successful, and greater numbers of Ovumula tended to remain subsistence agriculturalists. Yet, as the Portuguese cultural influence was resisted to a greater degree by the Ovumula, who tended to maintain traditional cultural practices and subsistence agriculture, they began to garner a reputation for a lack of sophistication and provincialism owing to what was perceived as a rather antimodernist position (Clarence-Smith 1979). In the literature on Angola’s history of ethnic relations, there are references to the “cultural conservatism” of the Ovumula (Clarence-Smith 1979; Warner 1991) or to their reputation in Angola as a “hopelessly backward and conservative people” (Warner 1991:103). Such ethnic relations were intimated to me by several clinic staff members, some direct, some rather more vague. One

response to the question of what makes someone Ovumuila and not Mbundu was answered with a knowing chuckle, a sound of hesitation, then “the language they speak is different.” Further questions were unwelcome. Another stated, “The Mumuila are really looked down upon. Like they’re less. Dirtier.” Beyond the scope of interview scenarios, costuming, too, evinced boundaries: Staff members wore white medical coats over Western-styled clothing, while the women I talked with all wore Ovumuila-styled clothing, replete with elaborate beaded jewellery and hairstyles, colourful skirts and bare feet. This was commented on by staff members occasionally, stating that they (Ovumuila patients) “still” wear “those clothes,” clearly not obtaining the status a “modern” wardrobe brings.

Ethnic Relations and TB

Such visual cues communicate a rich terrain of significance in understanding southern Angolan ethnic relations. The consideration that there were also non-Ovumuila *staff* members (and their white coats) is further significant as their medical training works potentially to influence how patients are viewed. In the case of TB, biomedical practice is shaped by a metaphorical legacy of “consumption.” Views of African bodies also figure prominently in WHO programming, working to render certain target groups—those more isolated, “poorer,” perhaps even “dirtier”—as at increased risk.

As postwar Angola was struggling with a collapsed infrastructure following the war, rates of TB—as in most of Africa—began to rise. Globally, only AIDS is responsible for more deaths than TB, and the highest TB mortality rates are found in sub-Saharan Africa (WHO 2008). Recognizing the significant disease burden this places on sub-Saharan Africa’s infrastructure at every level, the WHO has attempted to alleviate this burden through implementation of an intensive control program, in accordance with its goals to eliminate TB as a global health problem by the year 2050 (WHO 2008). TB also holds the rather unfortunate designation of having been responsible for more morbidity and mortality than any other bacterial pathogen worldwide (Corbett and Raviglione 2005; Roberts and Buikstra 2003), despite an overwhelming mid-20th-century optimism surrounding the effectiveness of public health measures and the pharmacological eradication of TB and infectious disease in general (Mayer 2000).

This historically situated spectre still looms large in biomedical programming around the globe, influencing how TB treatment is carried out and how individuals with TB are enfolded within biomedical discourse. The history of European colonialism in Africa is long. The

creation of modern Angola, for instance, is situated in relation to both the political history of Portugal and the entirety of the colonial enterprise within the African continent. In looking particularly at South Africa, Jean Comaroff (1993) suggests, in fact, that this colonial history and ideology shaped the European view of the body (in relation to the African body) and the development of medicine and public health. Nineteenth-century European thinking focused on the male place in nature and the human species in relation to the rest of the world. Reason, it was supposed, uncovered “man’s essence,” or human nature, which separated human from object and human from animal (Comaroff 1993). Knowledge therefore lay in “man” himself: “The essence of life was in the unplumbed depths of organic being, to be grasped through the invasive thrust, the looking and naming, of the new biology” (307). This way of seeing, this “invasive thrust,” equated with the body, was produced and reproduced in discourses about the “discovery” of Africa by European explorers (Comaroff 1993).

This exploratory endeavour by Europeans involved the creation of discourse around the “natural hierarchy” in which Africans were placed lower on the evolutionary ladder and thus closer to animals than white Europeans were. In Angola these ideas solidified the Portuguese colonial enterprise within the country. The Portuguese settlers, who felt looked down upon in Europe, came to Angola perceiving themselves as superior to the Africans, thus developing an entrenched and significant classist and racist legacy in their attempt to “maximize their own security at the expense of others” (Clarence-Smith 1979:57; see also Wheeler and Pelissier 1971).

At the beginning of the 19th century, European colonial officials sought to ensure the well-being of both government employees and the expanding European-majority communities. In South Africa (and Angola), the functioning of these communities was dependent on African labour. The contradiction of Africans being both central to the new colonial economy and yet marginal to its political and moral community was, according to Comaroff (1993), built into the constitution of South African society. The public health project to ensure the well-being of Europeans therefore also functioned to maintain control of Africans, situated within existing ideologies of colonialism and “man’s place” within the natural order.

The African body, along with the whole of the African continent, was viewed as infectious and dangerous (Comaroff 1993; Schoepf 1998). Viewing Africans themselves as dirty was congruent with the idea that they were, in evolutionary terms, closer to animals than the white settlers. This is particularly the case for HIV and

AIDS in Africa because it is also entrenched within Western ideas of African sexuality. As Schoepf (1998) points out, biomedical accounts of AIDS in Africa are overtly racist, characterizing African sexuality, particularly that of women, as “promiscuous.” In the global public health arena, these entrenched views of Africans are further evidenced by the sudden renewed interest in TB in the 1980s as a “re-emerging” infectious disease, though incidence rates had been climbing in certain geographical areas since the mid-century. TB in Africa—a disease of the poor and deprived—was thus not addressed in global health until the 1980s, when it became “problematic” in Western countries (Roberts and Buikstra 2003). Such labelling is an example of the metacommunication of biomedical discourse regarding African cultures and sexuality, and the idea of Africans being somehow dirtier (both sexually and as “impoverished”) in contrast to Europeans has not been completely lost to history, nor has the popular early 20th-century idea that TB was a disease of poverty.

The metaphorical history of TB in Europe highlights myriad cultural values that become reflected in constructions of disease, like romanticism, capitalism and increasing urbanism and industrialization. Sontag (1979:5), in highlighting the role of both TB and cancer in our collective Western medical imagination, suggests that “the fantasies inspired by TB in the last century, by cancer now, are responses to a disease thought to be intractable and capricious—that is, a disease not understood—in an era in which medicine’s central premise is that all diseases can be cured.” Though TB dissolved the physical body, it “etherealized the personality” and “expanded consciousness” in death and led to a new sense of death as aesthetic (18). The “consumptive appearance,” a physical measure of one’s social worth, became a manner of “appearing”—appearing to not eat heartily and looking sickly for the sake of glamour. The “tubercular look” symbolized “an appealing vulnerability and a superior sensitivity,” especially for women (29).

In southern Angola, though far apart in time and space from Romantic Europe, TB’s effects on the body also opened space for metaphors of “consumption” but in different form. Present in all of the interviews and numerous informal conversations I had with staff at the clinic was an implicit description of a non-sick body, a body (particularly, that of a woman) that was able to fully participate in expected Ovumula social relations and economic activities. This idea was evident throughout the women’s narratives in talk of the appearance of the non-sick body. Most frequently and most explicitly, this was explained by the women as a decrease in strength, specifically the inability to walk or to walk

long distances. When asked how they felt when they first knew they were “sick,” most women responded with descriptions of a cough that would not resolve and weakness. One woman stated that she decided to seek treatment because “I couldn’t walk ... and also, I had a big body, I was really big and strong ... but [not] now ... it’s because of the sickness.” Other women, in remarking about how they knew the medication/treatment was working, stated they were “feeling better” as expressed through a renewed ability to walk: “I’m feeling better because in the past I couldn’t walk a long distance but now, I can walk a good distance.”

For the Ovumula, who are not reliant on cars and telephones for communication, it is no wonder that the ability to walk, to move one’s body, was a prominent feature in the idea of what constituted a state of “abnormality”—of sickness. The importance of a state of being “big and strong” was also echoed by others, who showed me the degree to which they had lost muscle on their arms, who declined requests for pictures because they were ashamed of their thin bodies or who frequently commented on how big and strong *I* looked.

Yet perhaps the most potent metaphors of TB are those from the beginning of the 20th century, when the medical treatment of TB began the sanatoria movement. This change shifted from treating TB with pleasing scenery and climate—a “change of air”—to treating it via institutionalized segregation. With the rapid industrialization and urbanization in North America and Europe, TB became geographically situated in poor locales. The metaphors about TB came to reflect the disease as a “disgusting stigma of poverty” (Gandy 2003:22). The imbrication of disease and poverty is certainly evident in contemporary TB programming and remains particularly salient for the Ovumula, imbued as they are with the essentialist qualities of the “impoverished African” susceptible to or at risk for disease.

While life for these women is undoubtedly difficult, the processes that render them “impoverished,” “at risk” or as “targets” work, in a Foucauldian sense, to transform them into the subjects that necessitate the salvific mission of medicine and of the evangelical Christian organizations who run medical services like this. The idea of poverty is an idea of development produced within the past 50 years, classifying these women as impoverished based on Western economic standards (Escobar 1995). Though it is true that the women interviewed had to work extremely hard, were worried for their families and often could not generate enough income to pay for the health care they needed, the problem, it seems, is not that these women are living in poverty

but that we have come to view these women as being impoverished and therefore at increased risk for developing TB.

The idea of medical surveillance and discipline put forward by Foucault and the critique of Western medicine's focus on health as a project of self-discipline enacted on the body and separated from the social or emotional (Crawford 1985) both allude to larger historically situated systems of colonialism and development (Comaroff 1993). Escobar (1995), for instance, offers that the same problematization of phenomena by First World experts functions within the processes of development and the creation of the Third World. The need for resources for the capitalist-industrial system that fuelled the superpower status of the United States after World War II required the creation of a "domain of expertise" to control and manage the resources of the rest of the world. Just as medicine as science was seen as objectively describing reality and therefore not influenced by social processes (Hepburn 1988; Martin 1989), development became an economic and market-driven enterprise that was based on objective scientific fact, ostensibly legitimating it because of its removal from the cultural context (Escobar 1995). So, too, does the WHO TB programming function, where the concerns of the First World provide the imperatives for action in international health work (Lane and Rubenstein 1996). Yet this one-size-fits-all approach encounters innumerable obstacles in its deployment, as efforts at the clinic can attest.

The centrepiece of such an international health strategy intended to control TB is the DOTS strategy (Direct Observation Therapy, short course). Initiated by the WHO and the International Union against Tuberculosis and Lung Disease in the early 1990s, the DOTS strategy is meant to reduce mortality, morbidity and transmission of TB worldwide by "directly observing" patients as they take their medications (Lewontin and Levins 2003; Lienhardt et al. 2003). Because the treatment of TB is based on lengthy, multidrug therapy, the DOTS strategy was developed as a means of assisting TB patients in following a regimen that includes taking four different pharmaceuticals for six months (Garay 2004). Further, the DOTS strategy focuses on five major components: government commitment to TB control, diagnosis including bacteriology with an effective laboratory network, short-course chemotherapy with a four-drug regimen, an uninterrupted supply of quality-assured drugs and the consistent recording and reporting of patients (Chauhan et al. 2005).

DOTS has not met with the success initially anticipated, however, and much literature (particularly in the realm of public health) is devoted to uncovering possible

reasons for this. For instance, the issue of access to health care services is commonly raised in public health research and anthropological literature, as it relates to reasons why individuals do not comply with DOTS treatment regimens. It has been reasoned that if better chemotherapeutic agents were available—eliminating the need for lengthy therapy and combating the threat of multidrug resistance—issues of access and patient (non-)adherence, the most troublesome barriers to effective programming in this system, would be eradicated (Dye et al. 2006; Liefoghe et al. 1997; Pratt et al. 2005; WHO 2006a; WHO 2006b).

When examined in totality, the multiple barriers to proper TB control identified through different levels and perspectives of study move into tighter and tighter spheres of identification from the more general (like access and poverty) to more specific (patient adherence or consultation with traditional healers). Within the biomedical ethos, attempts are made to rationally assess why the implementation of a seemingly coherent control program is not functioning, most often focused at the patient level. Poverty and other socio-economic factors function on a larger access level, while practitioners of such a model enter into a patient-clinician relationship with cultural baggage and assumptions about the education levels of their patients and mistrust about patient compliance. In other words, treatment failure is the patient's fault.

The task of curing TB at the clinic, however, is frustrated by seemingly obdurate patients who refuse to seek the correct treatment or who default on it. The significant number of defaults (failure to "observably" take TB pharmaceuticals, resulting in a blank space on the patient's chart) was also a point of frustration. When asked why they thought so many patients had lapses in their TB treatment regimen, one nurse on staff with whom I spoke remarked, in rather exasperated tones, that patients say they forgot to come to the clinic or could not (would not) make the effort. With no phones and little contact information, the logistics of communicating the importance of continuing treatment to these deserters, or of reminding patients to come to the clinic, become quite complicated. The frustration regarding defaulting behaviour was also evident when patients with several weeks of unchecked boxes (defaults) on their medical charts resumed treatment. On one occasion, I witnessed a confrontation between a nurse and a TB patient. The nurse, waving the medical chart with its plethora of blank checkboxes, was quite forcefully castigating the patient for these defaults. The patient, meanwhile, stood rather meekly staring at the ground.

The frustrations expressed by the staff are understandable in the context of TB control; diagnosis and treatment based on DOTS would be simple and effective if all patients with TB followed the DOTS rules. The DOTS strategy requires unwavering devotion to treatment regimens and early voluntary case detection, meaning there is no room for flexibility in adhering to treatment. Phrased thus, such notions posit an implicit sense of responsibility in ensuring the success of the DOTS program. While several epidemiologically oriented studies place the responsibility of successful therapy on those supervising the care of the patient, because of the public health considerations related to TB (Hopewell 2006) or negligent care (see, for example, Buu et al. 2003; Squire et al. 2005), the majority, along with the staff at the clinic, place that responsibility, through education, on the patient. Simultaneously, such actions work to absolve the clinic and medical staff of any responsibility in the failure to eradicate TB.

Though this pharmaceutical regimen is effective in curing TB, certain people are necessarily targeted and chastised for not adhering to the orthopraxy of the control program as it is deployed. As the example of this particular clinic would attest, I would argue that it is those who fall into those WHO classifications—the impoverished and the provincial—who are foregrounded within its programming as its most potent targets. Such targeting is evident particularly in programming aimed at education, a potent index of medicine's orthodoxy and the necessity for conversion in getting subjects to believe the message and act accordingly.

From the perspective of the clinic staff, this process of conversion was an undertaking fraught with difficulty. There seemed to be a general frustration with the length of time it took for individuals with a cough to come in to the clinic, a frustration shared by many medical practitioners involved in TB programming and public health initiatives in Africa (Montgomery et al. 2006). One nurse suggested explicitly that what needs to happen is more education, as people generally do not realize a persistent cough could be significant and require treatment. Frustration was also expressed at the lingering idea that TB is caused by witchcraft, a belief which leads individuals to seek treatment from witch doctors. Such treatment may exacerbate the problem, cause other problems, or have no effect but to delay proper treatment, all of which impact on the health care provider and absolve the clinic and clinic staff of responsibility for treatment failure.

The women's ways of incorporating such "educational efforts" proved fascinating. Over the course of my fieldwork, what became increasingly apparent was the

hybridity of causal explanations of TB provided by the Ovumula women with whom I talked. TB information—what it was, how to treat it, what precautions to take to prevent contagion—was relayed by health care workers following diagnosis. When I inquired after what information was gleaned following such an information session, all of the women responded with a list of proscriptions reflective of the biomedical interest in preventing behaviour that may lead to infection of others. Interestingly, when a few women were asked directly, "What did [this nurse] tell you TB is?" one woman responded, "They told me that I had TB, that I had a cough, which is TB." She then went on to list the things she was told not to do. The other women mentioned nothing about "what TB is," but rather only what the health care staff told them to do or not to do. The women did not refer to themselves as having TB, instead stating they were either told their cough was TB or relied on the health care staff to give them information. Two women, for example, stated they were told to eat healthy food and not drink alcohol; what "healthy food" was, specifically, was not mentioned. One woman stated she was told not to eat dried fish (a rather common food staple), although she expressed uncertainty (or even apathy) as to why not.

In addition, while several women mentioned they were not supposed to eat with others or share utensils like cups or spoons, one woman said that she was told she could eat with her family. Most women offered further variations on how to "prevent the spread": cover their mouths when coughing, do not cough on others, and if you have to spit on the ground, cover it up or use a cup so that you can dispose of the contents. Sometimes this was understood as necessary, to avoid infecting others, but not consistently—the woman with extrapulmonary TB was not contagious (i.e., did not have pulmonary involvement) but still understood she was not supposed to cough on others and should cover her spit. Such efforts at education by medical staff, however, seem to engender divergence between the educators and those being educated, where disparate views of the power and authority of certain forms of knowledge, coupled with the requirement of conversion, work, in part, to entrench views of the backwardness of Ovumula patients.

Medical education and its concomitant financial benefits become powerful indices of the desire for the "modern" in post-conflict Angola. At the clinic, the mission of both its evangelical mandate and medical agenda can therefore be seen to be centred on education—the orthodoxy required to successfully "save." I would argue, along with Good (1994), that "correct belief" is of central

concern to science and the Christian mission effort in Africa. Belief is enabled through conversion and, as John and Jean Comaroff (1992) suggest, a reformulation of consciousness that results in ultimate salvation. The task of both missionaries and public health workers is to get people to believe (and subsequently do) the right thing, and if this task is accomplished, public health problems like TB will presumably resolve. At the clinic, the potency of this enterprise is such that a Community Health Team roves the countryside, "penetrating" further into the communities of the unreached. The Community Health Team, whom I accompanied on numerous missions, comprised up to four (non-Ovumuila) staff members. We drove through the scrub and bush to designated meeting spots, being met by upwards of 50 adults and children, who, following a short sermon and prayer, were vaccinated, weighed and given vitamins. The crucial mission of these teams, however, was to identify possible cases of TB to be registered. Individuals with suspected TB were then sent to the clinic for treatment.

While the impetus for such health teams is to bring the "message" that the Ovumuila should believe in the power of germs and their own sinful nature (understood to manifest itself through faith in traditional knowledge and in witch doctors or spirits, for instance) in order that they may receive salvation through medical mission practice, the translation of that message to action is less clear. When I asked why the women came to be treated at the clinic, all responded by explaining they had a social connection with a staff member. One woman, for instance, explained that her husband's brother is a neighbour to one of the nurses at the clinic. When the time came for the family to decide how to remedy the woman's increasing weakness and worsening cough, they chose the clinic because they knew someone who worked there, rather than (most tellingly perhaps) going to a government-run hospital where services were *free*. At the same time as public health researchers, epidemiologists and social scientists research reasons why TB continues to plague sub-Saharan Africa or why education programs are not functioning as efficiently as planned, here is a powerful example of how relationships function to relieve these women's afflictions in ways that feel appropriate to the Ovumuila, regardless of their perceived disease etiology or the ways such explanations may differ from the perceptions of the staff members who treat them.

Can this then be tenuously framed as a sort of resistance, a "consciousness of colonization," as John and Jean Comaroff (1992) suggest, a resistance to the inculcation of the promise of salvation, of cure, imported

by evangelical missions and medicine? The Comaroffs cogently demonstrate the colonization of consciousness within southern Africa through the imposition of a European way of seeing and being, and signs and practices, by conversion. They argue that the effect of such conversion discourse was that, regardless of the outcomes of such attempts at persuasion, Africans were drawn into encounters whose terms were set by Europeans. The "drawing in" of the Ovumuila into the discourse of medicine and mission through intensive and penetrative control programming in this way remains negotiable, however, becoming a fascinating imbrication of notions about where or what TB is and how, where and from whom to find a solution for its debilitating effects.

The relative isolation of the Ovumuila in southwestern Angola has, ironically, made them, quite literally, targets. They are targeted as "unreached" by the evangelical Christian mission organization and as "at risk" for developing TB because of their poverty and isolation, according to the WHO. Through this categorization, they are dually rendered "docile bodies" in the Foucauldian sense, providing the impetus for the incessant and penetrating mission of medicine in an increasingly globalized postwar economy. "At risk" in this sense is fascinating: at risk for TB, yes, but perhaps further representational of yet a different sort of consciousness of colonization by the WHO, a realization of the potentiality—the risk—of resistance. This would be a risk of significant proportion to the mandate of infectious disease eradication and the mission of the evangelical church for whom human souls may be ultimately unreachable. If the Ovumuila are, in fact, at risk—at stake, even—what it is that they are at risk *for* remains to be seen.

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Cross-Sex Siblingship and Marriage: Transformations of Kinship Relations among the Wampar, Papua New Guinea

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Abstract: Relations between brothers and sisters remain crucial to Wampar patterns of affinity and broader processes of social reproduction, despite a century of significant historical change. Nevertheless, the role that these ties play, under contemporary circumstances, contrasts in important ways with their former place in defining connections within and between corporate groups. Changes in partner choice, rates of interethnic marriage, concepts of intimacy, patterns of social stratification and household composition have all had effects on sibling bonds and their relevance to affinal relations. The effects of these factors are amplified by the Wampar's proximity to the city of Lae.

Keywords: cross-sex siblingship, marriage, interethnic relations, Papua New Guinea, social change and intimacy

Résumé : Les relations entre les frères et les sœurs demeurent cruciales dans les modèles wampars d'affinité et à travers des processus de reproduction sociale, malgré un siècle de changements historiques significatifs. Néanmoins, le rôle que ces liens jouent, dans le contexte actuel, contraste radicalement avec leur rôle traditionnel, qui consistait à définir des connexions au sein des groupes corporatifs et entre ceux-ci. Les changements survenus dans le choix des partenaires, les taux de mariages interethniques, les concepts d'intimité, les modèles de stratification sociale et de composition de la maison ont tous eu des effets sur les liens fraternels et sur leur pertinence dans le cadre de relations d'affinité. L'influence qu'exercent ces facteurs est accentuée par le fait que les Wampars vivent à proximité de la ville de Lae.

Mots-clés : rapports frères-sœurs, mariage, relations interethniques, Papouasie-Nouvelle-Guinée, changement social et intimité

Introduction

In this article I analyze the transformation of the links between cross-sex siblingship and marriage among the Wampar of the Markham Valley, Papua New Guinea.¹ I aim to show how these have changed and to explain why, among the Wampar in particular, they have become more varied and more complicated with an increase in the number of interethnic marriages and "interethnic sibling sets" (Beer 2006). Siblings with different ethnic affiliations might or might not live in one household (for shorter or longer periods), share resources (e.g., school fees or land), make a living together or support one another. The transformations I discuss are an aspect of a broader set of changes that present contemporary Wampar with new options in education, subsistence employment and residence in the context of their geographical location close to Papua New Guinea's second largest city, Lae.

Interest in kinship has moved again to the centre of anthropological research and theorizing, with an emphasis on construction of relations ("relatedness," Carsten 2000; "kinning," Howell 2006), personhood, intimacy (Jamieson 2011; Padilla et al. 2007) and shared experiences and practices (Alber et al. 2010; Alber et al. 2013; Morgan 2011). This process, which focuses on social change and the overlap kinship has with other relations, such as forms of ritual ties, co-parenthood and friendship, has revitalized kinship studies after a period of marginalization (Stone 2001:1) and the "cooling of anthropology's love affair with kinship" (Peletz 1995:345). This article aims to contribute to these ongoing discussions by analyzing dynamic connections between cross-sex siblingship and marriages in a rapidly changing socio-cultural context among the Wampar, a coastal ethnic group in Papua New Guinea.

It has become clear that the content and structure of relations are not separable; some structural aspects account for the specific characteristics of siblingship, and, simultaneously, ambivalent emotions (envy, rivalry,

support and closeness) influence the development of these relationships. Relevant aspects of siblingship are, first, that siblings are the closest relatives to share more or less their entire lifespan (compared to parents and children); second, that they compete for attention and care and sometimes for inheritance; and, third, that they also share (depending on age, birth order and gender) rights and obligations. In addition, in most societies, relations between siblings are categorically excluded from the sphere of reproductive processes.

It is common in non-industrialized societies for cross-sex sibling relationships to be fundamental to marital arrangements (see, for example, Kelly 1977; Marshall 1983b for Oceania). Among the Wampar, brothers had a lot of authority over their sisters; for example, brothers, rather than the parents, disciplined unmarried sisters/daughters. A mother's brother also played an important role in the lives of his sister's children, offering support that complemented that given by the father's family in important ways. Social and cultural change has had an impact on all aspects of sibling relations. Changes in partner choices, concepts of intimacy attendant on the nucleation of the ("modern") family, patterns of social stratification and new household composition have all had effects on sibling bonds and their connection to affinal relations.

In my research area in Papua New Guinea, these changes are part of a wider tendency for large corporate entities, within which individuals were related to genealogically distant kin, to yield decision-making powers to smaller family units (of different kinds). These have become the most important kinship-based social collectives, which constitute the reference point of loyalties, mutual support and trust. I call this process "familification,"² one aspect of which is the shift in the locus of major decisions and economic activities away from brother-sister relations to the bonds between husband and wife and their children.

Ethnographic Context

The Wampar are a language group of about 12 to 15 thousand persons, occupying the middle Markham Valley in Morobe Province, Papua New Guinea, close to the city of Lae. They live in eight villages, five of them close to the Highlands Highway. The concentration of the population in villages is a post-contact phenomenon, developed under the influence of colonialism and Christianization after 1911. With new economic opportunities through cash crops, cattle and chicken farms, and marketing along the main highway, additional settlements have proliferated. Today Wampar occupy an almost sub-

urbanized area, with much of the population accustomed to engagement with the market economy.

Aside from the growth in the number of hamlets and orientation toward the Highlands Highway (and the market economy), there has also been increasing factionalism in the dominant Evangelical Lutheran Church and the growth of new religious denominations and churches. Fischer (1975, 1994), who has studied the Wampar since the late 1950s, observed that until the 1970s all Wampar conceptualized themselves as members of one of the thirty named social groups called *sagaseg*. Wampar speak of *sagaseg* as patrilineal groups, but, as often happens in Papua New Guinea, the incorporation of non-patrilineal kin is common. Also, the fusion of non-related *sagaseg* is historically verifiable. Furthermore, marriage patterns and practices have been diverse and are changing, with, for example, increases in interethnic marriages (Beer and Schroedter in press), children born out of wedlock and adoptions. Marriages within the same *sagaseg* were formerly subject to sanctions, but this is no longer the case, and some young people have even become unclear about their membership of a *sagaseg* (Beer 2006).

These changes and others (including the very real possibility that a large gold and copper mine will be opened) have tended to challenge the hegemony of descent identities; what defines a Wampar, who counts as a member of the *sagaseg* and how inter-*sagaseg* relations are configured are less clear than they once were. Fieldwork between 2009 and 2013 made it clear that kin networks, which now often join ethnically different groups, have made Wampar ideas concerning boundaries and significant social identities more complex. In practice, the specific circumstances of particular social actors and the kinds of relationships they have among themselves and with their extended families, including those involving interethnic marriages, have become decisive in accounting for commitments between individuals and groups

This article will describe the results of field research on interethnic social and reproductive relations pertaining to siblingship and marriage among the Wampar. Population growth and comparatively intense in- and outmigration resulting from the proximity of Lae city have led to a marked increase in interethnic marriages involving Wampar and non-Wampar (called *yaner*),³ especially since the 1990s (Beer 2006, 2008). I will address challenges to and changes in the relationship between brothers and sisters that are induced when affinity and kinship get linked to ethnic identities.

Cross-Sex Siblingship and Marriage

Case study 1: A young, unmarried woman whom I had known for a long time behaved unusually during the early stages of my 2003/04 field trip to Gabsongkeg village. Whereas I used to see her chewing betel, chatting and sitting together with other women, preparing food or doing some other work together, now she stayed away from social events and informal gatherings and seemed to be depressed. Bruises were visible on her arms and shoulders, so I asked what had happened to her. People initially denied anything had happened; nobody wanted to speak about it. But, as usual, nothing can be kept secret for very long in the village, and it emerged that her brothers had beaten her up a week before I arrived, because she had a relationship with a man they did not like. He is Wampar but older than her, a widower from a land-poor lineage. He has a severely disabled child from his first marriage, who lives with the parents of his deceased wife. My friend's brothers thought the widower had not looked after his first family as he should have done and was not working enough in his gardens or in paid employment in town. So he was less than an ideal husband.

When I returned in 2009 the couple were married, had a child and lived not far from her parents' household. The story of the couple made me realize that many of the cases of violence I had witnessed over the years were between brothers and sisters, perhaps as many as between husbands and wives.

This case study exemplifies the asymmetrical power relations between brother(s) and sister(s), which was similar in former times. Fathers, especially, expect sons to discipline their sisters, yet their capacity to enforce their wishes on the sister/daughter is uncertain. Moreover, in the disputes between cross-sex siblings about proper marriage partners, it is not only brothers who try to force sisters to give up a relationship but also sisters, who may dislike the future wife of a brother. Following traditional family cycles, young couples would first live with the husband's parents, which makes it easy for unmarried sisters to drive a brother's wife out of the household. With young people spending more and more time at school, in town or with relatives in other provinces of Papua New Guinea, and with neolocal post-marital residence, it has become more difficult to observe relations between siblings at the time of the engagement and later marriage. Nevertheless, from narratives, I worked to reconstruct relationships and patterns of support and conflict, and I also observed obvious behaviours: settlement patterns and living arrangements, short- and long-term visits, marriages,

fostering and adoption of children, contributions to bridewealth, help with school fees, joint businesses and cooperation in work.

In his introduction to an influential earlier volume on siblingship in the Pacific, Marshall (1983a:12) suggested that the cross-sex sibling relationship contrasts with that between spouses as sharing does with exchange (even taking account of the day-to-day cooperation of husbands and wives). This reiteration of the Lévi-Straussian point that relations between dyads themselves are systematically related arguably overstates the contrast, but the importance of both brother-sister and husband-wife dyads in defining the broad profile of gender relations is worth stressing.

Marriage and siblingship are related in important ways. As noted already, brothers and sisters are members of one generation, so their lifespans are coextensive. Within one generation and the same lineage, rights, resources and obligations are of shared concern. Today older patrilineal usufructuary rights are transformed into "ownership," and that has to be negotiated. By default, brothers automatically have these land rights via the lineage, while their sisters do not have them. This difference has an impact on their relationship, their respective postnuptial residence and their powers with respect to their children.

Case study 2: Intermarriages with Adzera, a neighbouring ethnic group. Wampar women who marry non-Wampar men and their children often live with her parents, or bilocally (*ikam igo*) or in a third place where the husband works, because a yaner man has no right to use land for gardens or to start a business on Wampar land and would fully depend on his wife's brothers. My data on 957 marriages⁴ include 101 Wampar-Adzera couples (see table 1). Of 31 marriages between Adzera men and Wampar women, 12 couples live in Adzera territory, 14 in Gabsongkeg, 3 in a third place (town), and 2 bilocally. Of 70 marriages between Adzera women and Wampar men, only one couple lives on Adzera land, none lived in town, and none maintained two households. The gender asymmetry in Wampar-Adzera marriages reflects a strategy of economic hypergamy: Wampar, on average, have greater access to resources that both groups seek.

The case of Ngawe (Adzera) and his children exemplifies the difficulties of marriages between yaner men and Wampar women. Ngawe is a plumber who in the 1960s worked in Madang, where he married his Wampar wife, Tsowar-Lea, who worked there as a nurse. The couple moved back to Gabsongkeg in the 1980s, where they settled on Tsowar's brother's land, near the High-

Table 1: Marriages Between Wampar and Adzera

	Adzera husband	Adzera wife	
In Gabsongkeg	14	69	
On Adzera territory	12	1	
Adzera territory and Gabsongkeg	2	–	
Town	3	–	
Total	31	70	101

lands Highway. Ngawe maintains land rights among Adzera and wants to send his children there because he predicts conflicts over land will become fierce among Wampar. The couple has two daughters and three sons, all married to yaner and all living in Gabsongkeg, near their father's household at the Highlands Highway.

Ngawe had also informally adopted Tony, a brother's son. Tony fell in love with Enob-Ononempe, of Gabsongkeg, in 1991. Although her parents were strictly against the marriage, the couple married, and they have three surviving children; the family was consistently refused permission to use Enob's father's land. Instead, they lived with Ngawe, and Tony commuted between his Adzera village and Gabsongkeg. One morning in 2008, he was found dead at the highway, his body smashed by a car. It has never become clear that his death was an accident. In 2009 Enob was commuting between Adzera territory and Gabsongkeg, trying to sort out where her children could find homes in the future.

Ngawe's wife, Tsowar, has only one brother and a sister, who died young. Enob, in contrast has four

brothers and a sister, all married in Gabsongkeg and claiming land (see Figure 1). This case demonstrates a general fact: that the possibility of a yaner man residing with his wife's family is contingent on the situation of his wife's sibling set, especially her brothers and the amount of land her lineage has. Negotiations about staying or going never end, as Ngawe's worries about his children's future show.

Brothers, sisters and their spouses set many of the parameters for the future of their own children, nephews and nieces. Issues about land, the care of aging parents and investment in education involve and affect relations between siblings. Same-sex siblings help each other with marriage transactions (bridewealth and, more recently, a kind of dowry), which again links siblingship and marriage. Closeness and support, in conjunction with rivalry, between siblings and between their spouses tend to create ambivalence and sometimes outright conflict, especially in today's rapidly changing sociocultural context.

Sibling Exchange Marriage

Sibling exchange⁵ is (or was) the ideal form of marriage in many Pacific societies (Marshall 1983a:11). In various Wampar origin myths, crucial relations between whole ethnic groups are founded on sibling exchange. One tells the story of a ghost that turns into a man and impregnates a woman. He lives either as an eel or as a snake inside the woman or stays together with her and is finally killed by other villagers, who discover him and learn of his deeds. After his death his father (or grandfather) comes to the funeral feast and punishes the villagers for killing his (grand)son. He kills the villagers

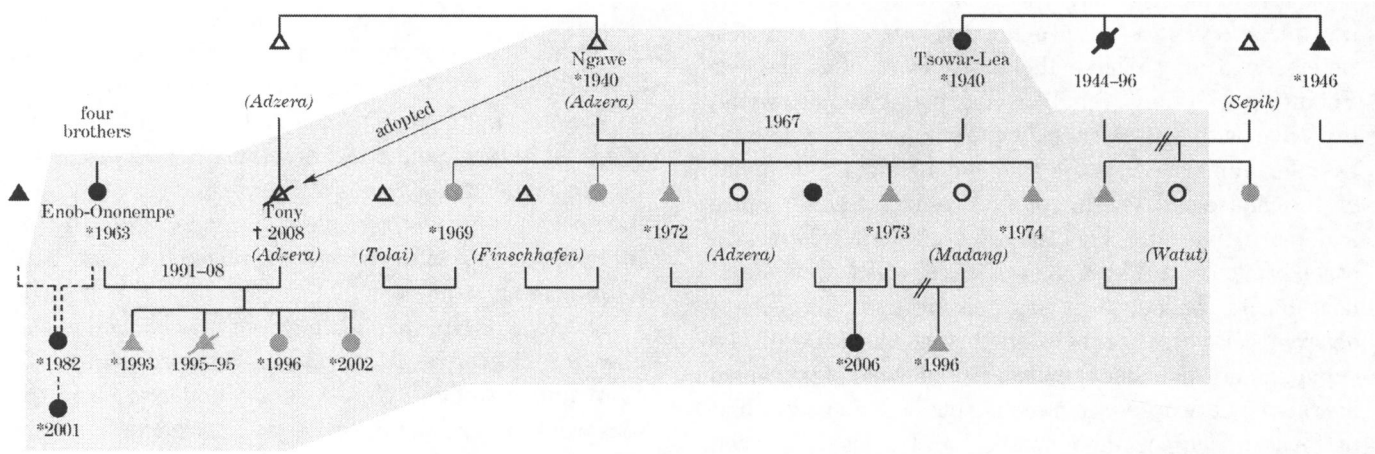


Figure 1: Ngawe's and Tsowar's kinship network (key: black symbols, both parents Wampar; grey, one parent yaner; white, both parents are of non-Wampar ethnic background).

with a big flood. Only two sibling pairs survive because they did not attend the feast (different versions give different reasons), and they engage in sibling exchange (*iwiriwir en nafon a riran*, “they exchange their sisters”). Their offspring are, according to different versions of the myth, humanity, the *ngaeng Wampar* and other peoples, or *ngaeng Wampar* and mountain peoples (Fischer 1975:204–206; 1994:66–68). Georg Stürzenhecker, a German missionary, documented two versions of the myth in the 1920s, and seven more versions were collected by Hans Fischer in the 1960s and 1970s (Fischer 1994:67). Even if the first part varies, all versions have in common that sibling exchange is the basis for the first marriages of Wampar ancestors.

Direct, immediate sibling exchange (“to exchange with each other,” *wiriwir* or *widiwid*; “sister exchange,” *edz ono refean*) was an important aspect of social organization among the Wampar. Even in the 1970s, more than a quarter of all marriages were of this kind. Out of 42 marriages by sibling exchange, 28 involved actual brothers and sisters, while 4 involved first-degree and 2 second-degree cousins (Fischer 1975:202, 203). This suggests that the exchanging units were not very large (but see the discussion of bridewealth below). It was important that the terminology and the generations exactly matched each other. Sibling exchange is one foundation of the strong position of the mother’s brother, as he is at the same time the husband of the father’s sister. The mother’s brother was said to be very influential in marriage decisions and the naming of his sisters’ children (202).

A man sees the children of his sister as “in between families,” expressed in the use of the verb *bantsar*, which means to “be or go between things or between people, to separate fighting parties, to mediate; to belong partly to something and partly to something else.” (Fischer n.d.) As one man explained, for example, “when my sister has a child, he belongs half to me (*ebantsar*). He is my ‘half-caste’” (Fischer n.d.).⁶

Over the last three decades sibling exchange has become rare, which is understood by Wampar as a logical consequence of the fact that, as young men put it, “women marry whom they want.” Wampar women have always been at least as active as men in courtship, and in former times they had to be convinced to agree to sibling exchange. Without their consent a marriage was not possible. Today many women marry men whom their families do not find acceptable. If the resistance of parents and brothers is strong, a woman might move away with the man she wants, either permanently or until after the birth of her first child.

Not all Wampar pay bridewealth, and if they do, it is often only after the couple has produced one or more children. Sometimes, if the husband’s family enjoys some business success and its senior members want to gain influence through a demonstration of strength and wealth, then bridewealth payments will be conspicuously made. According to Fischer, sibling exchange marriage also involved bridewealth transactions (1975:203). Usually, brothers and those raised in the same household have to contribute to each other’s bridewealth payments. These joint bridewealth payments strengthen the bonds between these close relatives (229). Other villagers make contributions too, according to closeness of kin relations. Hence, the sibling exchange marriage practised by the Wampar potentially joins two social units of wide scope in a quite dense web.

On the bride’s side, the adults who raised her have a right to bridewealth, even if they are only people with whom she lived. Some women have been raised in several different households, and therefore conflicts over entitlement to bridewealth emerge, especially recently, when Wampar women marry into ethnic groups prepared to pay large sums of money.⁷ Today, many people insist that namesakes (usually from the mother’s side) are entitled to the bridewealth, if the girl’s matrikin looked after her well. Nowadays, contributions to school fees are an important element in deciding entitlement to a share in bridewealth since school fees are a major financial burden for many families and an important investment in the future of children. Rising monetary bride-wealth payments can compensate for the considerable costs of education. An interethnic marriage may or may not involve bridewealth; when it does, the size of the transaction varies with such factors as relative reputation and the history of the relationship between the families involved, the specific ethnic background of the partners, and expectations for future relationships.

Traditionally, male relatives, especially brothers, contributed to the bridewealth of the groom. Nowadays, sisters also contribute to a dowry for their sister in marriage transactions, a custom that has to do with the influence of missionaries and modern ideals about equality in marriages. This has also become common in marriages between Wampar.

Marriage transactions can affect relations between spouses, between siblings and between affinal relatives. As noted, the ethnicity of a spouse is one factor that influences marriage transactions; in marriages between Wampar men and Adzera women, for example, a fixed bridewealth is paid after at least one year, whereas Tolai partners neither give nor expect bridewealth. In other

cases, bridewealth is given or not given for a variety of different reasons: Two families might be in friendly, close relations and want to keep the future exchanges of things and support open; in other cases, on the contrary, they are involved in conflicts which preclude bridewealth. In one case, a yaner husband who was not asked to pay bridewealth lives with his wife on her agnates' land, but the couple is obliged to look after those of the wife's kin who are either too young or too old to take care of themselves. Not asking foreigners for bridewealth is also a strategy of parents and brothers to maintain moral rights over their daughter/sister and her children.⁸

Case study 3: A 2009 investigation into preferred marriage partners revealed cases of relationships that were seen as incestuous according to Wampar norms. Two cases were described to me in some detail. One woman, at the age of 23, had an illegitimate child whom she raised in her father's household. People said she had remained unmarried because she had a marked limp. Much later she began a relationship with her first-degree cousin (MBS), who was seven years her junior. Her family was strictly against the relationship. The couple went secretly to Lae, where they entered into a legal marriage. They presented the certificate as grounds for general acceptance of the relationship. Later, when twins were born, most people began to accept the marriage. Now, the couple and four of their children live in her natal village, but her first, illegitimate child still lives with her father, who continues to regard her marriage as wrong.

In recent discussions about "good" and "bad" marriages and relations between siblings and cousins, the differentiation between cross and parallel cousins has become less important in norms and practices. As kin-term usage tends to move away from Wampar norms to Tok Pisin or English, it seems that certain differentiae (cross-sex or same-sex relative) have become less salient.

Demographic Changes and "Modern" Marriages

Many interdependent conditions have facilitated the transformation of kinship relations among the Wampar, including the demographic transition to lower mortality and a fall in average fertility, the mobility of the population and the high rates of immigration from other parts of New Guinea. Later age at marriage, higher education levels and frequent intermarriages have changed household and family composition. In short, pacification, Christianization, urbanization and access to media, travel and work in other parts of Papua New Guinea or

abroad have all led to fundamental changes of perspectives on "traditional" ways of life.

Some structural aspects of sibling sets have been transformed since pacification and Christianization of the Wampar in the 1920s. Lower mortality produced an increase of kin in all kinship categories. Possibilities to interact with all members of a kindred are limited, and therefore one expects the average genealogical distance between people who cooperate to "shrink" (Lang 1997:25). Combined with a Christian family ideology, spread initially by Lutheran missionaries but today by a variety of other churches too, these processes strengthen an ideal of the nuclear family with the husband-wife dyad at its centre. At the same time, declining fertility (produced by the availability of contraception, education and changes in values) produces smaller sibling sets relative to the wider kinship network (which lower mortality and immigration have made larger). Population growth since the 1970s, higher rates of migration, inter-ethnic marriages, and higher divorce rates and an increase in the number of remarriages have all acted to diversify coexisting family types and household forms. Moreover, the average age difference between siblings has increased, as has the average span encompassing the eldest and the youngest in the sibling set. (This is because of the increased age difference between the partners of interethnic marriages and between those who are remarrying.) As the spacing between siblings increases and as opportunities to move out of the natal household (for school, work, etc.) grow, the experiential dimension of sibling relations has also changed. Urbanization, education and employment possibilities have diversified individual life courses and the phenomenology of siblingship as well.

Relations between brothers and sisters and between husbands and wives among people like the Wampar changed significantly over the past 20 years as the direct and indirect effect of broader historical currents, but they equally demonstrate important continuities in values and practices in this period. The more general demographic changes in the Wampar population over the past 50 years have transformed household compositions and the relations between and within generations. An extension of the average lifespan, and the fact that people now marry later, means that some adult children spend more time with their parents than before and, because even very old men and women retain the headship of the household, often under their power. Brothers less frequently have to assume responsibility for younger siblings after the early death of both parents; conversely, looking after aged parents is increasingly a problem a sibling set has to face. A fall in the average fertility of women has lowered sibling-set averages and, therefore,

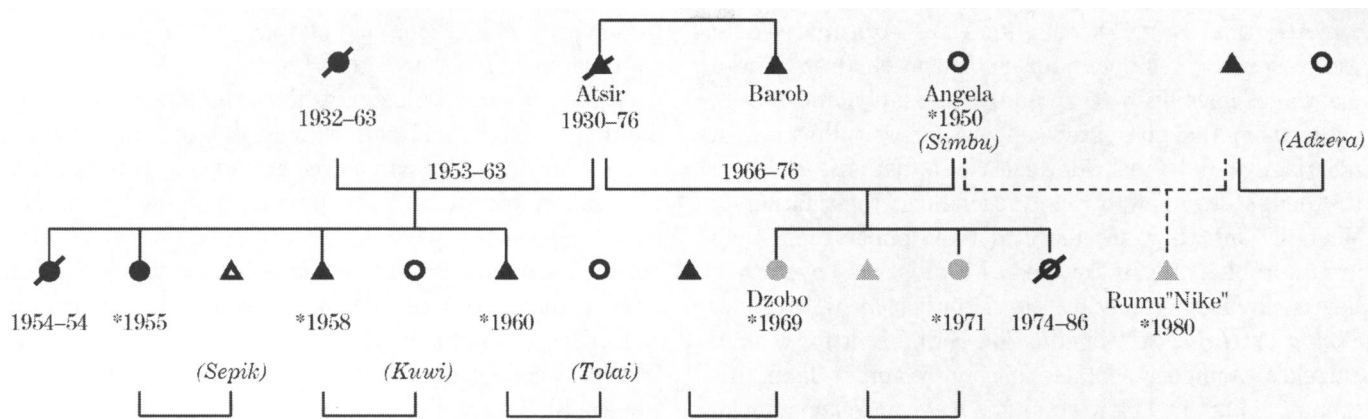


Figure 2: Atsir and Angela's offspring: siblings, half-siblings and stepsiblings (key: black symbols, both parents Wampar; grey, one parent yaner; white, both parents of non-Wampar ethnic background).

the size of the extended family, with a “decline in the numbers of aunts, uncles and cousins one generation later” (Johnson-Hanks 2008:303). How demographic changes influence relationships between brothers and sisters is a complex issue requiring further research.

While the demographic transition has important effects on household composition and kin networks, migration and mobility also exercise great influence on them. By the 1950s Wampar men had already begun to work in other areas of Papua New Guinea, for long as well as shorter periods. The following case study of Atsir and Angela's marriage illustrates some crucial aspects of these processes, in this case as they pertain to blended families.⁹

Case study 4: Atsir was born in 1930, and after World War II, he finished his education at a school founded by German missionaries. In 1953 he married his first wife, a Wampar woman who was two years younger than him (see Figure 2). At that time, most Wampar thought an age difference of one or two years was ideal. Their firstborn child died; three more children followed, a girl and two boys. In 1963 Atsir's wife died at the age of 31.

Atsir had become a truck driver who went up and down the Highlands Highway and did not spend much time with his parents and brothers in the village. Three years after the death of his wife, he brought home Angela, a 16-year-old girl from Simbu Province, after one of his journeys to the highlands. In 2009 Angela told me that her father had initially been vehemently against the marriage, for in the 1960s highlanders were still scared of coastal peoples. Atsir managed to convince her brothers and her father of the advantage of her marriage to Atsir, who paid bridewealth to her lineage. The newly married couple lived for some time in the

highland towns of Hagen and Goroka; later they lived in Lae, close to the Wampar settlement area. Their eldest daughter, Dzobo, was born in 1969, followed by two more, in 1971 and 1974, all in Lae. Later, the couple moved to Atsir's village of origin, where he became very ill. According to Angela, people were jealous and made sorcery against him. After he died in 1976, she and the still small children stayed in the village with his parents, and she continued to live there after Atsir's younger brother, Barob, succeeded his father as head of the household.

In 1980 Angela had an illegitimate son (Rumu, or “Nike”); she and her children formed a separate little household still attached to that of Barob and the rest of her deceased husband's relatives. The second eldest daughter died in 1986 after falling from a coconut palm. Today, Angela still lives in Gabsongkeg with one of her stepsons, who is married to a Tolai woman.

Angela's children not only are very different in age (with a gap of 20 years between eldest and youngest) but also differ in the ways they are related to Atsir's kin. Atsir's sons by his first wife have a well-established status in Gabsongkeg: they have enough land, and both married women from coastal ethnic groups whose status in the local ethnic hierarchy is equal to that of the Wampar. Their sister, married to a Sepik man, has severe “psychological problems,” according to her relatives, and they live in Gabsongkeg and share land with her brothers. However, that land use is sometimes contested: When the Sepik man gathered coconut for sale, Angela and others protested, and the case was discussed at a Friday meeting.¹⁰ The final opinion was that, while it is possible for a Wampar to give a foreigner rights to use land for subsistence, it was not permitted for such an outsider to use the land for business purposes.

Atsir and Angela's daughters are both married to well-respected Wampar men and have children. These marriages have been accepted by the family, and Barob, with whom the girls grew up, was most influential in marriage and later bridewealth negotiations. Because the daughters grew up in Gabsongkeg, their father is Wampar and they are married to Wampar men, they are unproblematically counted as Wampar. I have never heard anybody referring to them as *miks*, *hapkas*, *Simbu* or *Hailans*. The situation is different for Rumu, Angela's youngest son. He has no Wampar land. Although his father is known and is a clever Wampar who is not short of land, he is married to an Adzera woman and has many legitimate children with her. Nike uses the name of his deceased mother's husband, as a modern surname. Some Wampar say it is because Nike is lazy and does not work hard in the family gardens that Atsir's family has not given him land for gardens of his own. When he went to school, Angela initially paid the fees, but when he misbehaved, she stopped. Since then he has spent a lot of time in the highlands with Angela's brothers, coming and going between Simbu and Gabsongkeg.

Nike wanted to finish high school in the highlands but never got the money to do so. He hung around in the village and was criticized for being unsettled and unreliable. In his thirties in 2009, he remained unmarried. However, he now has employment with a human resource office in Lae; he was one of the first Wampar to contact me via Facebook and evidently uses new technologies like smartphones and the Internet.

Angela's brothers have always played a role in her life, even while she lived in Barob's household and then with her deceased husband's youngest son. "Living with" Barob meant she always had a house and a fireplace for herself and her children. Her brothers came to Gabsongkeg for extended visits, and while they were unmarried, they stayed with Angela for longer time periods. Exchange relations between Barob's household and her brothers from the highlands have been maintained for a long time. They brought vegetables and took betel nuts back home. When they stayed in the household, they helped with hard work like other young men attached to the household. In return, Angela's son Nike also went to the highlands and stayed with his mother's brothers for several months. Today one of her brothers even lives with his wife and two children in Gabsongkeg, which is quite unusual for a family of foreigners without first-degree affinal kin among the Wampar. During my fieldwork in 2009, another brother and some of his connections stayed with Angela while he sold cacao in Lae in an effort to meet a considerable

bridewealth obligation. One of Barob's daughters made a special meal for the visitors.

This case study illustrates the situation of a blended family of siblings and half-siblings who are offspring of one of the first Wampar marriages with a woman from a distant ethnic group. In such marriages, the age difference between the partners is usually bigger than it is between Wampar, as the man married the yaner woman after a marriage with a Wampar woman had ended or as a second, simultaneous wife. As a consequence, some Wampar children have half-siblings and stepsiblings who could, in terms of age, be their parents.

Since the 1990s there has also been an increase in women's mobility, and their absences from the family have become more frequent. Accordingly, women's opportunities to meet sexual and potential marriage partners have increased. Wampar women travel to markets to sell garden products (mainly betel nuts), and they go to town to spend their money. Attendance at high schools, colleges or universities and travel as a member of one of the many church groups or sports teams, as well as on other occasions, all provide women with the opportunity to be away from the supervision of parents and brothers. Mobility, education and absence from the family lead to a greater financial, emotional and practical independence of women from their brothers. Therefore, men have found it more difficult to keep sisters/daughters under control, or even to put effective pressure on them. Not all women prefer yaner husbands, but partner choice is more independent from family pressure. In the next section the case of a young Wampar woman who married a yaner will be described, to show how this influences relations with her siblings and children.

Ideals of marital relations have changed in most parts of Papua New Guinea. In addition to and connected with the changes noted so far, the spread of ideas of romantic love, passion and "companionate marriage" (see Wardlow and Hirsch 2006) affect not only relations between husband and wife but also those between brothers and sisters. The question of which social collective the couple owes solidarity and support is central to modern ideas of marriage, family and kinship, as Wardlow (2006) showed for the Huli. Among the Wampar, women have always had a certain degree of freedom in partner choice. They took the initiative in courting, although brothers monitored, and in some cases tried to control, their choices. After a woman had decided, her family would eventually come to approve of the relationship, especially once children were born. The usual pattern was for a woman to live for the first one or two years with her husband's parents and his siblings. Today more women marry yaner men and stay in Gabsongkeg

or move to town. The question of who owes solidarity and support to whom is answered in many different ways. Some women, for example, live for long periods in the household of their parents, even if they are married to a yaner; others leave while still young for education and work and spend a relatively short time in their natal families. In the first case, parents and the women's brothers accept a woman's right to make gardens together with a yaner husband on the clan's land, although, as noted, conflicts might arise if the couple seeks to earn a profit from Wampar territory.

The set of interconnected transformations discussed so far have effects on cross-sex sibling relations. These changes, and the options they present to Wampar agents, are also reflected in the language of siblingship, which can be used to emphasize, minimize or negate its significance, as the next section describes.

Siblingship in Blended Families and Transcultural Kinship

Wampar formerly differentiated between cross and parallel siblings and between siblings born of the same parents and those who have only one classificatory father or mother in common. With the additional linguistic resources of Tok Pisin and English, which most Wampar have access to, these possibilities have multiplied (see Beer 2011). The Wampar language has no term for "sibling." Ego distinguishes between cross-sex and parallel same-sex siblings, but a single term applies to cross siblings. One can add *fon* or *dzob nidzin*, "real" or "true," to the kin term for parallel or cross-sex siblings to designate non-classificatory siblings, or *ongan*, "other," for classificatory siblings. The Wampar, though, can also use the resources of Tok Pisin or English to facilitate whatever categorizations they need to make, and they usually switch between these different possibilities.

One often hears talk about siblings (*bratasusa*) in Tok Pisin. Some people still prefer the old usage, with *brata* designating a same-sex sibling/cousin and *susa* or *sista* a cross-sex sibling/cousin, although as Mihalic wrote in 1971: "This Melanesian usage is dying out in many areas and giving way to the European use of brother and sister" (1971:76). Today both forms still coexist, so people often have to ask twice if they do not know each other's siblings. This might be one sign that the differentiation between cross- and same-sex siblings is losing importance. *Brata* and *sista* are used for close friends of the same sex and age as well, and the terms can also be used in friendly forms of address. The Tok Pisin equivalent of Wampar *fon/dzob nidzin* is *tru*, used to indicate a "real" or "true" sibling. The situational dif-

ferentiation between closer, or "true," and more distant half- and stepsiblings indicates that the prototype of a sibling is a person who has the same father and mother as ego.

In former times, after a marriage ended, whether by divorce or the death of one or both of the partners, where the children lived depended on specific circumstances. They might remain with one parent or join the household of grandparents or of a sibling of a parent. Sometimes, siblings were split between relatives. No fixed rules existed (see also Fischer 1975:223). If one of the partners remarried, children did not usually join the new household. Today, with increased divorce and remarriage rates, blended-family households are no longer rare. In fact, various living arrangements are possible, as the next case study shows.

At village court meetings, I repeatedly heard the opinion that the parent who was not responsible for the divorce should have the children. But that does not mean that this person or his or her family actually wants to have the kids. Sometimes people argue that if bride-wealth has been paid, the children belong to the father's kin group, while if the bridewealth is paid back, the mother's side has rights in the children. Sometimes completely different arrangements are found. The following case study illustrates the sort of complicated situation in which a blended family may find itself.

Case study 5: Ngangkoa-Rut is a Wampar woman who has one sister and no full brothers (see Figure 3). Her mother, who was from a neighbouring ethnic group, died, and her father married a Menyamy (Imane) woman. The couple had a son, but the new wife left her husband, taking their son with her. Like her sister, Ngangkoa-Rut lives on her father's land with her son and three daughters by her first husband, a non-Wampar who had deceived and left her. After the separation Ngangkoa-Rut had an illegitimate girl by a Wampar man (in 2006). The girl has been adopted by an educated single Wampar woman, who lives in Papua New Guinea's capital, Port Moresby. Neighbours told me that the girl goes to an international kindergarten and "fantasizes" about marrying a white man. It seems there was some difference of opinion about the correctness of the girl living with an unmarried woman in town. People told me that she was a very beautiful baby, and many Wampar families would have loved to care for her. In 2008 Ngangkoa-Rut married Robby, a man from Simbu. The couple have a son, but most of those close to her secretly believe the boy's father to be a man from the Sepik region.

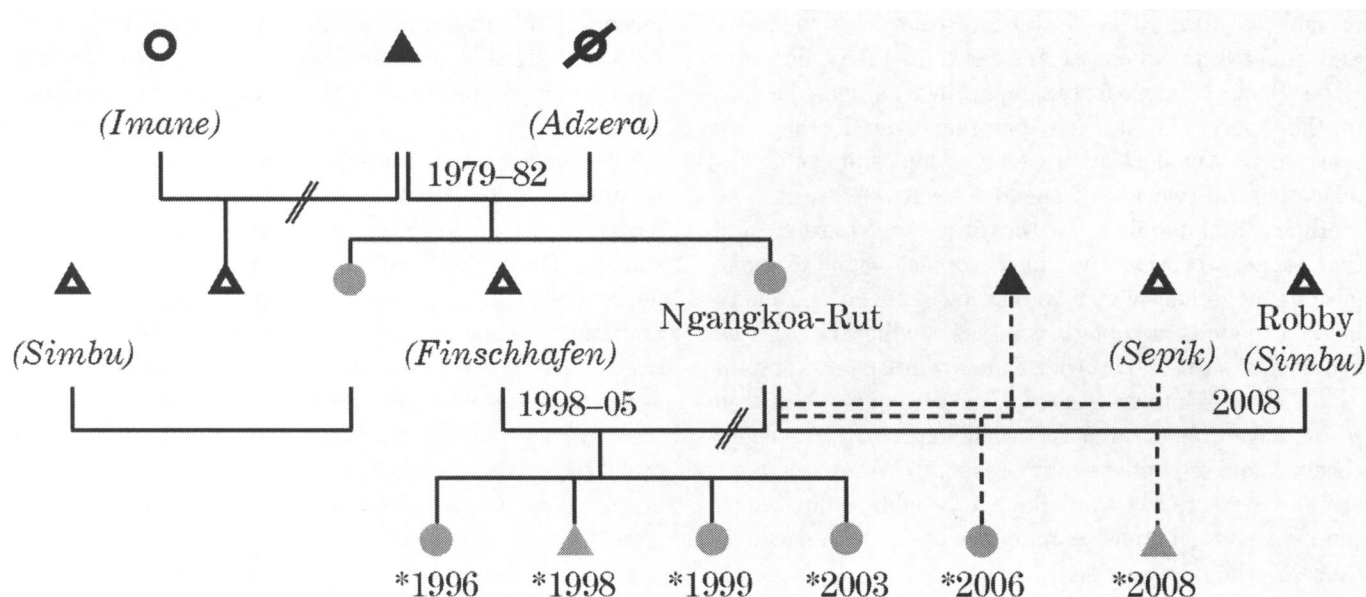


Figure 3: Ngangkoa-Rut's husbands and her offspring (key: black symbols, both parents Wampar; grey, one parent yaner; white, both parents of non-Wampar ethnic background).

Ngangkoa-Rut's children represent a heterogeneous sibling set, already somewhat dispersed and they could become more so. The daughter living in Port Moresby might come back one day, or another child might follow her. Ngangkoa-Rut's second husband might find out that the last-born boy is not his son, or the couple might have more children together. As Ngangkoa-Rut and her sister both live with yaner husbands on their father's land, it is not clear what will happen to their children, especially after their grandfather's death.

Following a more traditional Wampar logic, Ngangkoa's father's brothers would have influenced any decision concerning land. But times have changed; the new households have cleared gardens, which could not be taken away from them without trouble, and they have been selling their products for some time. Ngangkoa's and her sister's children have conflicting interests; they compete with each other yet share a similar status vis-à-vis other Wampar as *hapkas* with yaner fathers. Similar ambiguities of contemporary siblingship have been investigated in Euro-American contexts that are not inflected by descent-group identities and ethnonymic identities. Anderson reports that

there is a wide array of sibling relationships that can appear in remarried families and the nature of these relationships is often ambiguous. This ambiguity is illustrated by children's responses to a seemingly simple question: Who is in your immediate family? Furstenberg (1988) found that 41 per cent of children excluded their stepsiblings from their lists of imme-

diates family members. Interestingly, Furstenberg finds that these exclusions were unrelated to the length of time spent living in a stepfamily. [1999:101]

Anderson's own investigations of the quality of interpersonal relations compared siblings, half-siblings and unrelated stepsiblings in the United States:

The relationships of half siblings were more like those of full siblings than stepsiblings, a finding in accord with the reports of Ganong and Coleman (1988, 1994). Although half sibling relationships showed somewhat less rivalry than full siblings and were observed to be less positive than those between stepsiblings, the composite analyses showed no differences between full and half siblings and no other differences emerged ... In sum, in these long-term stepfamilies, stepsibling relationships stand out as a unique group. They exhibited less [tendency to conflict] than other sibling relationships, but appeared equally as positive. In contrast, there were few differences in the relationships among half siblings, and full siblings in stepfamilies and nonstepfamilies. [1999:121, 126]

Anderson's description of siblingship in blended families matches some observations made among the Wampar, although gender contrast is a stronger factor than birth order in Wampar sibling sets. Among Wampar, half-siblings and stepsiblings are seen as kin although there is still nothing equivalent to the Western ideology of "immediate" family; nevertheless, the quality of relationships has to be negotiated on the basis of how those so linked actually interact (living together, eating the same

food, having the same mother or father, being raised by somebody, sharing a name) rather than being defined in terms of rights and duties. However, in the course of negotiations full (tru or fon) siblings and half-siblings can be and sometimes are differentiated, especially when the issue is access to real economic resources.

In transcultural families, the question of the ethnicity of the father or mother makes any issues that might arise for siblings much more complicated. I made the point above that idealizations and structural oppositions tended to elide the ambivalence of relations between brothers and sisters and between men and women, as these were configured in the past. Today the patterns of exchange, sharing, solidarity, cooperation and conflict are expanded and made even more complex as Wampar sociality encompasses non-Wampar Papua New Guineans ever more often. This complexity leads to changes in behaviours and emotions and in access to land and other resources.

In particular, the behavioural and emotional tone of cross-sex sibling relations has altered. Many Pacific peoples have characterized the brother-sister relation in overwhelmingly positive terms, as providing a person's main source of support, protection and emotional closeness. Many anthropologists reported these ideals and norms without the qualification that descriptions of actual behaviour can provide (McKinley 1983 is a notable exception). Such idealization may colour any account of siblingship and kinship in general, but cross-sex siblingship seems particularly liable to it, especially by comparison to the characterizations of parallel siblingship, which are often depicted as more likely to involve conflict (Marshall 1983a:11).

Today Wampar still emphasize what Marshall (1983a) called "love," "concern" or "compassion" between kin in general and siblings in particular. This closeness between siblings is customarily attributed to their standing in a structurally similar relationship to other persons and resources (e.g., land), and they "share a jointly inherited past and a common future" (13). That this tends to be less true of siblings under contemporary conditions is obvious: Children tend to share fewer experiences with their siblings as a result of the separations produced by education and employment. Advantage, choice and aspirations may now be differentially distributed within a sibling set to a significantly greater extent than they were, although siblings still feel they have a special relation to each other and share access to resources within the village. New conflicts certainly arise, but it would be wrong to see the cross-sex sibling relationship as having been free of them in the past. Continuity and discontinuity are relevant to both the positive

and the negative dimensions of the ambivalent relations between brothers and sisters. So while siblings share resources and can be supportive, protective and emotionally close, that these relationships could generate conflicts has always been true. This applies to cross-sex siblings as well; for example, brothers, who have to protect their sisters, are also seen as responsible for disciplining them when necessary. Among the Wampar, violence is actually no more frequent between husband and wife than it is between brother and sister (even between brothers and married sisters). On the other hand, men's customary responsibilities are invoked these days when brothers support a sister with illegitimate children or adopt her children if she finds a new partner. This happens increasingly frequently with the rise in the number of single mothers, some of whom have illegitimate children from different fathers, sometimes of different ethnic backgrounds.

Land rights, land use and inheritance practices have all been impacted by these changes, as the case studies demonstrate. Wampar traditionally passed land from fathers to sons. Today exceptions to this pattern of inheritance occur and can be a source of conflict: Some yaner men live with the family of their wife because it suits the brothers or father of the woman. Some Wampar men who spend many years working in other parts of Papua New Guinea, where they marry yaner women, find they have to defend their land rights against brothers (and sometimes sisters with yaner partners) who have gardened on their land during their absence. Whether these changes in mobility, marriage patterns and gender relations lead to conflict or not depends on how much land a lineage has, the composition of the sibling set, whether the clan or any of its component lineages has sold or leased land or plans to do so, and whether absent family members have maintained relationships with village kin.

In a cross-cultural comparison Cicirelli found (despite acknowledged methodological difficulties) a fundamental difference between sibling relationships in "industrialized" and "pre-industrialized" societies, noting that "perhaps the most basic difference is that sibling relationships in industrialized societies tend to be discretionary, while in non-industrialized societies they are obligatory" (1994:16). One could also interpret changes in Wampar sibling relations as shifts from obligatory to discretionary modes, involving more diversity in degrees of closeness. Cicirelli summarizes:

Overall, in non-industrialized societies, sibling relationships are of fundamental importance in determining family functioning and the family's adaptation to

the larger society, with sibling cooperation essential to attain marital and economic goals (Weisner 1993). In contrast, in industrialized societies, sibling relationships are secondary to spousal and parent-child relationships and do not have a major effect on family functioning or adaptation to the larger society. [16]

He assumes that “the family” has a “function” in society in general, and although he points out aspects of change that are worth investigating, some of the conclusions he draws from his comparison of sibling relations are problematic. There is more to the described changes in sibling relations than he can see in his data. I would claim that they are part of a wider process of familification, a transformation of Wampar (or even Melanesian) kinship systems and sociality related to Christianization, urbanization, economic changes, mobility and migration and their consequences, of which changing brother-sister relations are one important aspect.

Conclusion: Transformations of Intimate Relations

Before the 1970s, sibling exchange and bridewealth payments set many conditions for kin relations in succeeding generations and also involved the relationships that last the longest in most life courses, as siblings tend to share many different life stages—sharing a household as children, finding partners, negotiating marriages, caring for the next generation and becoming old. Generalized reciprocity, the sharing of obligations, mutual concern and competition are central to the usual course of this process, but these have all changed in recent decades. Today, in all stages, from sharing in the household of orientation, through negotiating bridewealth, to handling together the death of parents (negotiating inheritance, organizing burial, etc.), things are somewhat different. Moreover, migration may lead to marriage with non-Wampar, in which case sibling exchange is no longer directly connected to bridewealth or other ritualized patterns of exchange, even if it is still based on reciprocity and mutual support. Today, with fewer sibling exchanges, the size of the kin networks in which people have connections increases.

Over the past 35 years, these related changes have resulted in a fundamental transformation of cross-sex siblingship. First, the increased rates of interethnic marriages and of remarriages have led to more multi-ethnic and blended sibling sets, and to some that are both. Before the 1980s, stepsiblings seldom grew up together, and blended families were rare. After the remarriage of a single parent, a child usually grew up with his or her grandparents, whereas today a child might stay with a

remarried parent. Relations between full siblings, half-siblings and stepsiblings can be similar in closeness, mutual help, trust and also competition, but patrilineage relations to land can produce differences between siblings, and Wampar acknowledge this, especially in case of conflict. Second, the changes in possibilities for partner choices and the differentiation of life worlds of today's young people (with some of them growing up in blended families) have made things more complicated and altered relations between siblings. Socio-economic differences within and between families are at once a result of change and a condition liable to produce more diversity.

The most general conclusion is that the increase in possibilities for Wampar agents, males and females, means siblings (and the wider kinship network) can exert less control over each other. The influence of “Western” family values; peer groups at school, church and other associations; “role models” depicted in the media; and ideas about consumption and “lifestyle choices” are all liable to affect individual decisions. Negotiations now conspicuously take place in a nuclear or extended family or are avoided by moving away, for a shorter or longer period.

With the changes detailed in this article, in marriage decisions, household composition and the constitution of intimate relations, it is not uncommon for sibling sets to be heterogeneous with respect to descent and ethnic identities and with respect to access to Wampar resources. In this process, brother-sister relations can sometimes relax and become more supportive, especially in new environments, like boarding schools or urban settings. But some new arenas of conflict have also emerged. Resources (especially access to land) are becoming scarcer and more valuable; therefore, competition is increasingly sharp. At the same time, new possibilities to avoid conflict arise, such as marrying out, moving to town or looking for education or employment somewhere else. Within transcultural, blended sibling sets, children have connections to different localities and different kinship networks. The illegitimate, “unrelated” Nike (case study 4), for example, spent time with his mother's brothers in the highlands after conflicts with his Wampar stepsiblings and half-siblings. Later, he returned, and relations relaxed again. This shows how a greater space for individual strategies and opportunities to find support in other kinship or friendship networks may attend modern transformations.

Some parents still expect sons to discipline their sisters and to observe more traditional values about partner choice and kinship obligations. Other parents have themselves already followed a more unusual life course in respect to migration, marriage and way of

life. The familification of kinship networks, individualism and the high diversity of family and household patterns form the background to heterogeneous contemporary cross-sex sibling relations among the Wampar. Some of these relationships remain among the most intimate, trusting relations an individual has. For others, competition, envy and resentment have made them distant, perhaps hostile relations. Still, the “de-kinning” of siblings remains hardly conceivable, even when interactions come to an end through death or permanent migration. Most actual brother and sister relations, including relations between (transcultural) half-siblings and stepsiblings, are located on different points on a continuum between these extremes; moreover, they are liable to change their quality as life itself unfolds and to vary for each of the dyads within the sibling set, depending on age, birth order, ethnic background and gender.

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Notes

- 1 Fieldwork has been conducted in 1997, 1999/2000, 2002, 2003/04, 2009 and 2013 and was additionally informed by the Research Focus Wampar, established by Hans Fischer in 1958. Fischer had conducted fieldwork in Gabmadzung in 1965, and then in Gabsongkeg in 1971/72, 1976, 1988, 1990, 1993, 1997, 1999/2000, 2003/04 and 2009. In 2009/10 Doris Bacalzo and Tobias Schwörer did research in Dzifasing, and Heide Lienert, Christiana Lütke, Rita Kramp and Juliane Neuhaus worked in different Wampar villages.
- 2 *Familification* refers to the process of social change in which individuals related through primary social reproduction (procreation, birth, alimentation, care, support) are (re-)defined by dominant ideologies as an especially marked unit, differentiated from relations grounded in more distant kin connections, friendship or neighbourship. A growing focus on the “family” is connected to the broader context of Christianization, consumerism and advertisements, medicine and health care, social work, policies, gender, corporations and the education system.
- 3 Wampar call all non-Wampar from Papua New Guinea yaner, and they address and refer to specific people mostly with their first name and a place name of their area of origin (e.g., “Kaspar Sepik”). The ethnonyms I use in this article are used by Wampar for a specific person and refer

to localities of different size, ethnic groups (“Simbu”) and regions (“Hailans”). Sometimes they match the ethnonyms used by yaner themselves.

- 4 The figure includes no longer and still existing marriages since the 1950s, as well as inter- and intraethnic marriages with a partner from Gabsongkeg village.
- 5 I use *sibling* and not *sister exchange* because both men and women are exchanged. However, in Wampar this is expressed as *sister exchange*.
- 6 *Edza nafod ongan epeng naron, da gea ebantsar edza. Gea imu edza hapkas.*
- 7 During fieldwork in 2009 a conflict was going on about a young woman who wanted to marry a “Simbu.” His kin announced bridewealth of K50,000. The father of the girl claimed the money as he had paid the bridewealth for her mother, who separated from him but whose kin never paid back the bridewealth. From when she was three years old, the girl had grown up with her mother’s father. It was unclear who should have how much of the bridewealth. Her father also married a woman from Salamaua who died giving birth to their second child, and then he married a Wampar woman who left him (taking a child with her); in 2009 he married his fourth wife from the Sepik.
- 8 Doris Bacalzo also made this observation in the context of her research on transcultural socialization and childhood among the Wampar in the village Dzifasing (Bacalzo Schwörer 2011, personal communication, February 5, 2014).
- 9 A blended family, in the paradigmatic case, is a domestic group comprising a married couple and the children resulting from earlier relations of the partners, as well as, if there are any, children of the current relationship. The members are living together and are part of different kindreds owing to earlier separations and often continuing interactions with ex-partners and their relatives. “Transcultural blended families” refer to different ethnic affiliations of the spouses or partners or of their children.
- 10 Lutheran missionaries established the custom of *dzob a gom renan*, or “Friday talks,” for the discussion and resolution of conflicts. Since village courts have been established, they have lost their importance, because it is easier to get compensation in money at the village courts.

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Processus d'altérisation de l'obeah à Sainte-Lucie

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Résumé : Les processus de stigmatisation entourant l'obeah à Sainte-Lucie sont analysés du point de vue de la moralisation négative de la « sorcellerie ». Le concept d'altérisation est utile à la compréhension de ce phénomène – tant du point des discours coloniaux, religieux, populaires, médiatiques que scientifiques – et il devient indispensable pour saisir la différenciation sociale et morale dont sont l'objet ces pratiques et les personnes associées. La réception de l'altérisation doit aussi être intégrée à cette analyse, ce qui est ici donné à voir via l'étude des éthiques ordinaires et des stratégies de légitimation des praticiens de/associés à l'obeah. Cette perspective démontre la nécessité de concevoir la production de l'altérité comme un processus simultané d'intériorisation et d'extériorisation.

Mots-clés : altérisation, moralisation, éthiques ordinaires, obeah, sorcellerie, Sainte-Lucie

Abstract: The analysis of the processes of stigmatization against obeah in St. Lucia is conducted from the point of view of the negative moralization of "witchcraft." The concept of Othering is useful to the understanding of this phenomenon—both in terms of colonial, religious, popular, media and scientific discourses—and it becomes essential to grasp the social and moral differentiation that these practices and people associated with them are facing. The reception of Othering must also be part of the analysis, through the study of ordinary ethics and strategies of legitimation of practitioners of / or associated with obeah. This perspective demonstrates the need to develop the production of Otherness both as an internalizing and externalizing process.

Keywords: Othering, moralization, ordinary ethics, obeah, witchcraft, St. Lucia

Introduction

La notion d'altérité, au cœur de la discipline anthropologique, semble aller de soi. Son caractère essentialiste doit pourtant être questionné et il est regrettable que les aspects dynamiques et relatifs de ce concept soient généralement négligés¹. Car l'altérité n'existe pas sans le processus d'altérisation qui la produit et la reconduit. Comme il n'y a pas de « race », de « classe » et de « sexe » en soi, l'altérité n'existe elle aussi qu'à l'intérieur de processus sociopolitiques et historiques qui lui ont donné naissance, elle renvoie donc à un processus de naturalisation d'une relation de pouvoir (Dorlin 2009). La dénomination de l'Autre suppose déjà une relation de pouvoir entre l'énonciateur de cette différence² et la personne – ou le groupe – qui est visée par cette distanciation. Comme le rappelle si bien Delphy (2008:19-20), l'Autre n'est « jamais maltraité en raison de qualités ou de défauts qu'il exhiberait en tant qu'individu ou que groupe ; il est maltraité d'entrée de jeu, au moment même où on commence à le désigner comme 'Autre' ». Les processus d'altérisation s'appuient donc sur des processus existants de différenciation sociale, la construction de l'altérité devant inévitablement être conjuguée à une hiérarchisation sociale (Delphy 2008). La tâche consiste alors à saisir les enjeux de pouvoir inhérent aux logiques d'altérisation, de production et d'énonciation d'une différence.

Il existe de multiples utilisations du concept d'altérisation dans les travaux scientifiques, souvent reliées aux travaux de Saïd (1978) ou de Spivak (1985). Plusieurs tendances se dégagent des recherches actuelles utilisant le concept d'altérisation : circonscription au champ des relations interculturelles, restriction du concept au niveau identitaire, manque d'approfondissement des dimensions morales (Meudec 2013). En effet, même si les aspects éthiques et moraux semblent traverser nombre de ces perspectives (via les termes suivants : stéréotypes négatifs ou péjoratifs, stigmatisation, dévalorisation, moralisation...), les relations étroites entre la mise à

distance sociale et les évaluations morales ne sont pas systématisées. L'altérisation, définie dans cet article comme processus de différenciation sociale et morale, peut être observée à la fois au sein de pratiques de recherches en sciences sociales, mais aussi à travers les discours politiques, médiatiques et les relations inter-individuelles au quotidien. Le présent article procèdera à un bref rappel des relations entre anthropologie, « sorcellerie » et altérisation, montrant comment le domaine d'étude des pratiques magiques et sorcellaires illustre à merveille le processus d'altérisation. Une recherche doctorale sur la moralisation de la sorcellerie et la dimension éthique des pratiques magiques et sorcellaires à Sainte-Lucie viendra ensuite illustrer et appuyer le développement d'une nouvelle perspective donnée à l'étude de la construction des rapports d'altérisation.

Anthropologie, altérisation et « sorcellerie »

L'anthropologie a contribué à produire de l'exotique, à créer l'altérité et à reproduire la logique d'altérisation en son sein (Cunin and Hernandez 2007). Au cours de l'histoire, les populations locales, les « indigènes » ont été altérisés dans un contexte où de nombreux anthropologues se sont rendus complices du colonialisme (Harrison 1991; Mafeje 1976). Aujourd'hui encore, « *there is the constant risk of exoticising, if not othering, the locals* » (Olukoshi and Nyamnjoh 2008:1). De telles critiques à l'égard de la « méthode anthropologique de l'altérisation » ressortent notamment de recherches axées sur l'étude des pratiques magiques et sorcellaires, là où l'on assiste à l'invention d'un « Autre ethnographique », généralement réduit à une seule dimension, ces pratiques étant renvoyées à la tradition, à l'irrationalité ou à un ailleurs (Kapferer 2003:5). La construction de la sorcellerie comme figure de l'Autre est une perspective partagée par plusieurs auteurs (Green 2005; Shaw 1997). Dans le cas du Paraguay, Blaser (2005:154) écrit par exemple : « *The concept of witchcraft provides an uncomfortably close example for anthropologists (...) of how enlightened critique reproduces and perpetuates hierarchical differences with enormous political consequences* ». La « sorcellerie » est souvent considérée en anthropologie comme un phénomène existant en soi, excluant de ce fait les mouvements sociaux et politiques donnant lieu à ou participant à son existence. Shaw (1997) considère en ce sens que la sorcellerie en Afrique doit être conçue comme le « produit de l'histoire de la traite atlantique ». Cela fait écho au travail de Siegel (2006) portant sur l'altérisation historique (*historical Othering*) de la sorcellerie en Indonésie ou à celui de Green (2005) soutenant, dans le cas de la Tanzanie, que les politiques d'éradication des pratiques

de sorcellerie et les recherches anthropologiques à leur sujet ont finalement contribué à leur institutionnalisation. Ces approches remettent en question le fait que la « sorcellerie » soit tenue pour acquise dans de nombreux travaux en sciences sociales, révélant la nécessité d'étudier la construction scientifique de la « sorcellerie ». Ces réflexions sur le statut à donner à la magie et la sorcellerie dans nos recherches conduisent au cœur des questionnements épistémologiques de l'anthropologie (Kapferer 2002).

L'altérisation de la « sorcellerie » opère par l'association de certaines pratiques au passé, à l'irrationnel, à l'ailleurs, aux superstitions et cela aboutit souvent au regroupement et à la catégorisation d'un ensemble de pratiques et de représentations variés sous un même vocable (Green 2005), quitte à forcer l'inclusion. Le cas de l'*obeah* à Sainte-Lucie illustre ce phénomène, là où l'altérisation se traduit bien souvent par l'attribution d'un caractère négatif et maléfique à un ensemble non homogène de pratiques. L'*obeah* est ici compris comme un ensemble de pratiques de gestion thérapeutique, spirituelle, magique et sorcellaire de la maladie et de l'infortune. Ces pratiques, nommées de façon similaire dans d'autres îles anglophones de la Caraïbe, sont souvent associées à la « sorcellerie » dans le cas de cette étude³.

L'altérisation comme processus de moralisation

Cette recherche s'inscrit au sein des développements récents de l'anthropologie des moralités et de l'éthique (Fassin 2012; Lambek 2010a; Massé 2009). L'étude de la moralisation, impliquant une conception contextualisée de la morale, rend compte des processus d'attribution de qualités morales significatives à un phénomène, un objet ou une pratique (Howell 1997; Rozin 1997), ainsi que des processus de construction ou de maintien des valeurs, des jugements moraux et des « moralités (*moralities*) ». Cette conception dynamique et évolutive permet d'envisager les enjeux pluriels entourant la visibilisation ou la disparition de certaines valeurs morales (Lambek 1993), les changements moraux de fond d'une société, tout en se rappelant la possible coexistence de moralités au sein d'une même société ou d'un même individu.

À Sainte-Lucie, la moralisation négative de la « sorcellerie », c'est-à-dire l'attribution de valeurs morales négatives, s'exprime entre autres en termes d'altérisation. L'étude des processus de construction de l'*obeah* comme pratique sorcellaire maléfique démontre d'une part la nécessité d'envisager une définition non-essentialiste de la « sorcellerie » (mes recherches ayant démontré que l'*obeah* ne renvoie pas à un ensemble circonscrit

de pratiques précises ou à portrait typique de praticien) et, d'autre part, le fait que les pratiques et les personnes de/associées à la « sorcellerie » ne peuvent être conçues indépendamment de leur altérisation (au plan colonial, religieux, scientifique, médiatique, populaire). Une telle perspective permet de saisir la reconduction du caractère illégitime et immoral associé aux pratiques et aux praticiens de/associés⁴ à l'*obeah*, alors que cette attribution émanait surtout des institutions coloniales et religieuses par le passé. Le concept d'altérisation aide à rendre compte de la moralisation négative des pratiques de/associées à l'*obeah* à Sainte-Lucie, lesquelles sont mises à distance et renvoyées aux autres, dans le temps ou dans l'espace, un phénomène constaté également par Mantz (2007) à la Dominique. Le pouvoir sorcellaire est ainsi attribué aux Autres, du Sud de l'île ou des régions reculées, aux anciens, aux Martiniquais, Haïtiens, Africains⁵. Pour paraphraser Sartre (1947), *l'obeah, c'est les autres*.

Plusieurs processus de moralisation ont été identifiés dans le cadre de cette recherche (Meudec 2013). Le processus d'assimilation renvoie aux glissements sémantiques et axiologiques – de sens et de valeurs – effectués envers des personnes, des pratiques ou des désignations. Ce phénomène rend par exemple compte de l'infléchissement fréquent existant au sein des conceptions locales entre l'usage de protections, la manifestation d'une « croyance en l'*obeah* », la possession de connaissances et la possibilité de pratiquer la « sorcellerie » (donnant lieu au raccourci selon lequel celui qui s'intéresse à l'*obeah* pratique). J'ai aussi démontré dans mon travail doctoral la façon dont l'intention, la prétention et l'action de se protéger sont souvent renvoyées à la pratique de l'*obeah* et par conséquent à un même registre maléfique. Un autre phénomène favorisant la moralisation négative des pratiques et des praticiens de/associés à l'*obeah* est le processus de dilution, apparaissant à travers l'utilisation de termes généralistes et euphémiques pour désigner les pratiques et les praticiens de l'*obeah*. Ce processus de dilution, reflété dans les discours par ce que Favret-Saada (2009:30) nomme une « imprécision délibérée », se joint donc à l'assimilation à travers l'usage préférentiel de « désignations euphémiques (*euphemistic designations*) » (Alleyne and Payne-Jackson 2004:121) – la « sorcellerie » n'étant que rarement nommée comme telle –, ce qui a pour effet d'instaurer de nombreuses ambiguïtés au sein des logiques accusatrices.

L'étude des discours moraux entourant l'*obeah* a permis de constater la présence d'un autre phénomène, qui agit souvent de pair avec l'altérisation, à savoir la contagion morale. À partir des travaux de Vignato

(1999) portant sur les logiques d'accusation dans un contexte de contamination au VIH/sida, de Masquelier (2008), et bien sûr de Douglas (1971), j'ai défini comme suit cette notion rattachée aux logiques accusatrices à Sainte-Lucie : la contagion morale est un processus de moralisation spécifique, caractérisé par l'attribution, par contact, de qualités morales similaires entre personnes, ou entre une personne et un objet ou un lieu. Dans le contexte saint-lucien – une société d'interconnaissance où la question de la réputation est importante –, ce phénomène rend compte de l'imputation de caractéristiques morales à un individu en fonction des attributs sociaux et moraux des personnes de son entourage (amis, famille, connaissances), en fonction de ses accointances avec l'Église catholique, de sa (dite) possession d'un objet ou d'un instrument d'*obeah* (protection, livre...). Ainsi, nombre de pratiques sont guidées par l'existence de risques potentiels associés à cette contagion morale, ce qui permet de comprendre les logiques de préservation ou de renforcement du statut moral des praticiens accusés, logiques basées entre autres sur le secret, la prudence et la revendication de non-malfaisance.

Toutefois, alors que la contagion morale aurait tendance à refléter une attribution de valeurs sur le mode du rapprochement, le processus d'altérisation procède quant à lui à partir d'une mise à distance, d'une exclusion. Dans ce travail, je définis le processus d'altérisation comme l'ensemble des processus discursifs et des actions, s'appuyant sur des critères de disqualification et des jugements moraux, qui attribuent, à certains individus ou groupes sociaux et ethnoculturels, une altérité irréductible et combinée à des valeurs morales généralement négatives.

Expressions de l'altérisation à Sainte-Lucie

J'ai démontré dans ma recherche doctorale la pertinence du développement des enjeux éthiques et moraux de l'altérisation, ainsi que le nécessaire dépassement des termes généralistes binaires (Bien / Mal) pour approfondir l'étude du contenu moral de la différenciation sociale (Meudec 2013). En effet, même si cette polarisation Bien / Mal est omniprésente dans les discours à Sainte-Lucie, elle est davantage caractérisée par un mouvement dialectique et complémentaire entre ces deux pôles. Ainsi, Bien et Mal n'existent pas de façon absolue et ils s'incarnent de façon ambiguë dans des discours personnels à l'égard de personnes ou de pratiques précises. En effet, l'analyse de la « sorcellerie » comme objet de discours moraux et comme pratique éthique a permis de soutenir, d'une part, que les discours moraux de délégitimation et de moralisation négative (essentiellement les discours

coloniaux, religieux, publics, populaires, scientifiques, médiatiques et littéraires) ont participé pleinement à l'altérisation de l'*obeah*, et, d'autre part, que les cibles de ces processus d'altérisation – soit les praticiens de/associés à la « sorcellerie » – développent des stratégies variées pour répondre ou réagir à la mise à distance sociale et morale et aux accusations sorcellaires les concernant.

Enjeux historiques et coloniaux

La pratique de l'*obeah* est officiellement illégale à Sainte-Lucie jusqu'en 2004 (Bilby et Handler 2012), date de publication du nouveau Code criminel dans lequel l'*obeah* n'est plus mentionné. Au cours de cette criminalisation passée, issue de la période coloniale et esclavagiste, les praticiens de l'*obeah* étaient qualifiés d'« empoisonneurs » (Savage 2012), d'« imposteurs ou de charlatans (*frauds or quacks*) » (De Barros 2007), et les pratiques religieuses étaient dites « primitives et barbares » (Paton et Forde 2012). L'argumentation coloniale favorisant la répression de l'*obeah* s'est déclinée en ces termes, les textes de loi venant entériner ces perceptions et instaurer officiellement l'illégalité de ces pratiques, d'ailleurs toujours d'actualité dans plusieurs pays caribéens (Bilby et Handler 2012; Paravisini-Gebert et Fernández Olmos 2011). De cette façon, le rôle positif de ces pratiques dans la vie quotidienne des esclaves a été minimisé (Bilby et Handler 2004). C'est donc à travers l'application d'une conception européenne de la « sorcellerie » aux pratiques de guérison des esclaves, se reflétant dans les choix étymologiques effectués par rapport au terme *obeah* (Bilby et Handler 2004), qu'un ensemble non homogène de pratiques a été défini par les Blancs de façon entièrement négative (Handler 2000). La moralisation négative et l'attribution d'un caractère maléfique à l'*obeah*, apparaissant dans les discours des colons, puis des représentants de la loi et du gouvernement (magistrats, juges, policiers...), ont subsisté dans les écrits scientifiques ultérieurs, notamment ethnographiques et historiques (Paton 2012). Ces derniers s'appuient en effet pour la plupart sur des données de seconde main empruntées aux premiers écrits eurocentristes et racistes, ce qui a déformé ou rendu partielle leur vision de l'*obeah* (Bilby et Handler 2004; Paton 2012). La reproduction des préjudices et des conceptions négatives par les universitaires est également mentionnée dans le cas des religions afro-cubaines (Ayorinde 2004).

Et l'altérisation actuelle de l'*obeah* reconduit en partie les représentations coloniales passées. En effet, l'application de la notion de « sorcellerie » aux pratiques associées à l'*obeah* illustre un processus d'altérisation

occidentalocentré, initié durant la colonisation et reconduit au fil des siècles. Le poids des préconceptions occidentales sur cet ensemble de pratiques spirituelles et religieuses en Jamaïque conduit Paton (2009:16) à parler de « construction coloniale de l'*obeah* » pour évoquer ce phénomène comme une création du colonialisme, le pouvoir colonial ayant produit l'*obeah* lui-même. Cette notion rend compte de l'institutionnalisation (coloniale, religieuse, scientifique) de l'altérisation de ces pratiques, laquelle s'est transmise aux conceptions locales ordinaires. Ainsi, la pratique de/associée à l'*obeah* s'est développée au quotidien de façon nécessairement secrète et dissimulée (Paravisini-Gebert et Fernández Olmos 2011), étant perçue principalement comme source de détérioration sociale et non plus comme instrument de résistance (Mantz 2007). Cette continuité axiologique de l'altérisation se traduit aujourd'hui par l'utilisation locale du terme *obeah* pour désigner des pratiques souvent jugées indésirables et maléfiques, ce qui fait écho à la réappropriation du terme de sorcellerie en Afrique (Geschiere 1997).

Enjeux linguistiques

Au plan linguistique, il existe une différenciation morale et sociale entre les deux langues officielles à Sainte-Lucie (créole et anglais), lesquelles ne disposent pas du même contenu axiologique, comme Alleyne (1961) l'avait déjà constaté. L'altérisation de l'*obeah* opère à travers une association du créole et des personnes créolophones à l'*obeah*, et à une dévalorisation de cette langue et une disqualification des personnes associées. En effet, le créole est souvent considéré comme quelque chose de moins qu'un « vrai » langage (Garrett 2007), le terme « patois (*Patwa*) » (Frank 2001), connoté péjorativement, étant utilisé localement pour le désigner. En outre, les créolophones étant souvent plus âgés et les anglophones plus jeunes, cette altérisation s'exprime aussi en termes de différenciation générationnelle. La littérature s'ajoute au processus, constituant un élément de différenciation entre praticiens de l'*obeah* et prétendus praticiens, là où les praticiens lettrés, souvent plus jeunes, sont assez facilement soupçonnés d'accointances avec l'*obeah*. La possession et/ou l'usage de livres de livres de magie et de « sorcellerie » constitue alors un des signes de l'engagement sorcellaire. La Bible peut aussi parfois être empreinte de connotations maléfiques (Bougerol 1997), conduisant au soupçon à l'égard de personnes lettrées proches de l'Église catholique. On constate ici, à travers les accointances avec l'Église catholique et la possession/usage de livres de « sorcellerie », une des expressions du caractère transmissible et « contagieux » des attributions morales négatives asso-

ciées à l'*obeah*. Et c'est ici à partir de cette contagion perçue – faisant écho à une conception de l'efficacité magique procédant par effet de contagion (Mauss 1902) – que la logique d'altérisation s'exprime, visant des personnes et des pratiques auxquelles sont attribués des critères moralement mauvais.

Enjeux socio-économiques

Les logiques d'altérisation s'appuient également sur des critères sociaux – générationnels et genrés – et géographiques. L'âge agit parfois comme moteur de disqualification dans la mesure où les personnes âgées seront dans certaines situations plus facilement associées à l'*obeah* que les jeunes, même si dans la réalité il s'agit d'une pratique exercée aussi par les jeunes générations, à l'instar de ce qu'a montré (Bougerol 2008) pour la Guadeloupe. À ce décalage générationnel se superpose dans les discours un autre clivage, entre milieu urbain et rural cette fois, chaque lieu revêtant des représentations différenciées. La mauvaise réputation des milieux ruraux se traduit par l'expression consacrée, le *bush* (brousse), qualifiant un lieu peu fréquenté, potentiellement dangereux, et supposément idéal pour les pratiques associées à l'*obeah*. Le milieu rural est parfois représenté comme plus dangereux, d'autant qu'on lui attribue aussi une présence plus grande de personnes âgées, créolophones et censément plus proches de leurs origines africaines, reflétant un processus d'assimilation entre caractéristiques sociales et ethnoculturelles. Les habitants des campagnes, créolophones, seraient marqués par une « africanité » plus grande, ce qui les rendrait davantage susceptibles de croire ou de pratiquer la « sorcellerie », même si, dans les faits, les praticiens de l'*obeah* sont aussi citadins⁶. Certains praticiens résident dans des zones reculées en campagne et cette caractéristique alimente le processus d'altérisation, faisant ici écho au phénomène d'inversion symbolique (Hell 2002; Taverne 1996) selon lequel l'éloignement géographique et social d'un praticien engendre l'attribution de qualités magiques et thérapeutiques plus grandes. Est donc attribué un pouvoir thérapeutique et/ou sorcellaire plus fort à l'Autre, un Autre « ethnique » ou « national », éloigné géographiquement, culturellement ou socialement. Le cas des « voyages thérapeutiques » à l'étranger, c'est-à-dire des séjours effectués par des praticiens saint-luciens pour offrir des soins, illustre ainsi le grand pouvoir thérapeutique et magico-sorcellaire alloué à l'altérité.

L'altérisation cible également certains groupes socio-professionnels (politiciens, magistrats, policiers). En ce qui concerne les policiers et les représentants de la loi, cette représentation a peut-être à voir avec le fait que

ces personnes ont pendant longtemps été les agents de répression des praticiens de l'*obeah*, ces derniers ayant développé au fil du temps une grande connaissance des tactiques policières et donc des stratégies d'évitement et de protection face à d'éventuelles arrestations (Paton 2012). Anderson (2008) mentionne ainsi le fait que les policiers sont, en Jamaïque, à la fois les clients et les cibles des pratiques d'*obeah*. À Sainte-Lucie, la moralisation du statut socio-économique touche plus largement la réussite sociale et/ou professionnelle, autant chez les hommes que chez les femmes, l'attribution de « sorcellerie » pouvant être conçue comme « *a moral assertion often directed to curb an infraction such as the accumulation of power and wealth* » (Bond et Ciekawy 2001:323). Une mise à distance sociale et morale s'appuie aussi sur la prétendue pauvreté des praticiens de/associés à l'*obeah*, l'altérisation et l'attribution sorcellaire visant ici des personnes marginalisées, aux ressources économiques faibles, situées à l'autre pôle de l'échelle sociale, comme cela a pu être observé en Haïti (Hurbon 1987) ou en Tanzanie (Green 2005). Pauvreté et saleté sont souvent associées pour juger de l'immoralité des praticiens, de leur « mal propreté (*mal pwòpté*) » – matérielle, physique et morale. La notion de saleté morale devient ainsi propice pour illustrer ce processus moralisateur et ces attributions sorcellaires visant des praticiens sur la base de signes matériels extérieurs, de leur apparence physique, du lieu d'habitation ou d'exercice – jugé sale et/ou isolé et/ou dangereux et/ou malfamé – et du mode de vie, d'autant que l'attribution d'*obeah* s'exprime localement en termes de « tâche (*tach*) ».

Le genre intervient aussi dans les logiques d'altérisation à Sainte-Lucie, donnant lieu à l'existence d'une « moralité genrée » (Meudec 2009), laquelle s'exprime notamment dans le cadre des relations affectives et sexuelles. En effet, certains signes de l'engagement sorcellaire se construisent différemment selon le genre. Pour les hommes, c'est leur notoriété ou leur popularité auprès des femmes qui peuvent conduire à des accusations, le recours à l'*obeah* étant ici attribué à la volonté de séduire ou de pallier une impuissance sexuelle. L'attribution genrée des accusations s'effectue en cas d'exacerbation de traits associés à la masculinité, mais aussi parfois en cas de transgression des rôles de genre. Quant aux femmes, le jugement moral et sorcellaire fondé sur les relations affectives et sexuelles se traduit par un stigmatisme associé au célibat. En effet, parmi les femmes accusées d'*obeah*, praticiennes ou non, bon nombre sont relativement âgées, vivent seules, sont célibataires, divorcées, veuves ou en situation monoparentale – que cette situation soit voulue ou non,

revendiquée ou non. D'autres femmes accusées sont mariées ou vivent en concubinage, mais pour diverses raisons, sont financièrement autonomes et indépendantes de leur mari ou de leur conjoint. De façon générale, les jugements moralisateurs s'adressent aux femmes et jeunes filles plus durement qu'aux hommes et garçons, ce qui n'est d'ailleurs pas spécifique à la société saint-lucienne. Le jugement d'immoralité ressort en cas de non-conformité aux critères « traditionnels » de féminité ou sur la base de certains comportements jugés arrogants, décadents ou défiant les conventions sociales (Mantz 2008). La sexualité est aussi visée, là où les femmes jugées infidèles, sexuellement actives ou homosexuelles sont stigmatisées, faisant écho aux écrits de Kelly (2002). Ces constats font écho à ce que Wilson (1969:71) nomme un « double standard de moralité sexuelle » dans la Caraïbe.

Enjeux ethnoculturels

Le processus d'altérisation de l'*obeah* est aussi construit sur la base d'une différenciation ethnoculturelle, reliée à l'usage du créole ou à une implication personnelle dans des pratiques dites « traditionnelles ». On assiste alors à une distanciation reliée à l'attribution d'un certain crédit thérapeutique et magico-sorcellaire à des individus culturellement et socialement distants. Cette conception touche les personnes d'origine africaine, haïtienne ou indienne – souvent plus pauvres à Sainte-Lucie⁷ – et cela renvoie à l'idée d'une survivance d'une « mentalité africaine » et d'une origine essentiellement africaine⁸ des pratiques associées à l'*obeah*. Ce phénomène vise la pratique d'activités culturelles et « folkloriques » associées à l'Afrique, comme le *Kele* (Anthony 1986; Simpson 1973), un rituel qui a fait l'objet d'une condamnation importante par les Églises chrétiennes au cours de l'histoire. Cette forme d'altérisation vise aussi les Saint-Luciens disposant d'un phénotype associé à l'Afrique. Ainsi, on entend que les *vyé nèg* ou les *moun djiné*⁹ sont plus à même de croire en l'*obeah*. La dépréciation des Noirs est souvent combinée à une valorisation des Blancs, un phénomène présent dans beaucoup d'anciennes sociétés esclavagistes. En effet, bien que la question du préjugé de couleur soit rarement débattue dans les sphères publiques et privées à Sainte-Lucie, pourtant objet de recherches ailleurs dans la Caraïbe (Bonniol 1992; Giafferi 2007), sa pertinence demeure indéniable dans cette société. En effet, l'existence de discours axiologiques différenciés selon des caractéristiques socioculturelles et phénotypiques va de pair avec des inégalités sociales et une hiérarchisation spatiale fondée sur un processus de racisation, cette dernière

étant alimentée actuellement par l'imposition du développement touristique « tout-compris » (Meudec 2015a).

L'évitement de la question des origines africaines des Saint-Luciens, faisant écho à la « convention d'évitement des relations raciales » présente en Colombie (Cunin 2000:171) ou en République dominicaine (Schaffler 2008), laisse la place à des préjugés souvent négatifs à l'égard de comportements associés au passé esclavagiste. Ces représentations témoignent d'une sorte de coupure face à l'histoire coloniale de ce pays, même si cette vision n'est pas partagée par tous, comme des membres du mouvement rastafari et des chercheurs ou membres d'organisations culturelles. À Sainte-Lucie, les images – médiatiques notamment – de l'Afrique sont souvent réduites à la pauvreté et aux guerres, réactivant l'idée selon laquelle « tout ce qui est mauvais vient d'Afrique ». La moralisation des pratiques, des personnes ou des comportements associés à l'Afrique se décline sur un mode principalement négatif, même si certains éléments culturels sont parfois valorisés, comme à Cuba (Argyriadis 2000). Le processus d'altérisation touche aussi les Haïtiens, et l'évocation d'Haïti suscite des jugements très souvent négatifs, faisant écho à la situation de stigmatisation vécue par les personnes d'origine haïtienne ailleurs dans la Caraïbe (Bougerol 2010; Mantz 2007; Reno 2008; Schaffler 2008).

Discours de (dé)légitimation (à l'égard) des praticiens

L'examen de l'ensemble de ces critères de disqualification, organisateurs du jugement (Lambek 2010b), donne accès aux modalités d'expression des logiques d'altérisation et de moralisation négative de l'*obeah*. Cela donne un aperçu du contexte d'exercice des praticiens de/associés à l'*obeah* à Sainte-Lucie. Le processus de différenciation sociale et morale dont ils sont l'objet se fonde sur des représentations historiquement ancrées, sur des critères linguistiques, géographiques, générationnels et de genre, mais aussi sur des critères socioéconomiques et ethnoculturels, qui sont parfois interpellés de façon conjointe. Le processus d'altérisation à leur égard se traduit par une interprétation morale de certains comportements, capacités personnelles et caractéristiques relationnelles, signes physiques et critères socio-économiques ou ethnoculturels. Les conséquences possibles sont variables, allant de l'exclusion à l'attraction, de la dépréciation à la valorisation. Sur la base de critères esthétiques par exemple, la (dite) saleté, la (dite) laideur et la présence de signes associés à la marginalité (tatouages, piercings, cicatrices...) peuvent constituer des facteurs d'attraction, d'autant plus lorsqu'ils se combinent à un lieu d'exercice éloigné, à un statut socio-économique

faible ou à une origine ethnoculturelle dévalorisée. Certaines situations sont plus propices – mais pas systématiquement – aux attributions d'*obeah*. Pensons notamment aux imputations visant une femme âgée, pauvre, créolophone unilingue, habitant en milieu rural, ayant séjourné en Haïti et dont les origines africaines sont visibles, ou un jeune homme lettré, vivant une situation de marginalisation, réputé arrogant et ayant des fréquentations jugées douteuses. Ce dernier cas invite d'ailleurs à déconstruire la figure classique du praticien de l'*obeah*, souvent perçu à Sainte-Lucie comme une personne âgée, créolophone, habitant en milieu rural et ayant des origines africaines marquées. En effet, mes recherches ont démontré que les personnes revendiquant une pratique de/associée à l'*obeah* sont également jeunes, anglophones, citadines et leurs pratiques sont tout autant teintées de référents européens et nord-américains qu'africains¹⁰. Ainsi, même si les discours sur l'*obeah* à Sainte-Lucie ont tendance à altérer ses origines en direction de l'Afrique ou de l'oralité, il faudrait aussi tenir compte des traditions écrites et occidentales ayant influencé ces pratiques ; cela transparait notamment dans l'utilisation d'ouvrages occidentaux au sein des pratiques : *The Sixth and Seventh Books of Moses* (De-Laurence 1910), *Egyptian Secrets* (Albertus Magnus 1997 [1919]), *The Secret Lore of Magic* (Shah Idries 1957), *Voodoo & Hoodoo* (Haskins 1990 [1978]), *Dragon rouge* (Anonyme 1997 (réédition)).

Discours accusateurs et réactions à l'altérisation

Face à ces logiques d'altérisation, les praticiens de/associés à l'*obeah* développent des discours de renforcement et de préservation de leur statut moral, en partie pour répondre ou devancer l'altérisation et les évaluations morales négatives à leur égard. Ils deviennent ainsi, au quotidien, à la fois sujets et objets de l'altérisation. L'étude de leur travail éthique a permis la mise à jour de réactions récurrentes et, parmi celles-ci, la posture de mise à distance et de reproduction de l'altérisation est une des plus fréquentes. Cette attitude implique souvent un démenti et une revendication de non-malfaisance, lorsque les praticiens se défendent de « faire du mal », de mettre leurs pouvoirs en pratique « pour le sexe ou pour l'argent », de faire des remèdes « par la force ». Cette forme de démarcation identitaire (Argyriadis 2000) invite les praticiens à reconnaître l'existence de telles pratiques tout en rappelant le fait de ne pas être concernés personnellement, de ne rien savoir de l'*obeah* ou de ne pas fréquenter des gens qui y sont associés, traduisant une volonté d'évitement de la contagion morale. La posture exclusiviste permet de se

distancer des pratiques maléfiques, par exemple en revendiquant l'impossibilité d'avoir « deux Maîtres » ou de prôner autant le Bien et le Mal. Il s'agit aussi parfois de dénigrer les pratiques et comportements des autres praticiens, jugés « immoraux », ce qui permet du même coup d'afficher sa bonne moralité et de légitimer sa pratique. Ce positionnement éthique exclusiviste, socialement et moralement valorisé, revient à instaurer une frontière entre Eux et Nous (Bhabha 1994), entre ceux qui « croient en l'*obeah* » et ceux qui s'en défendent, entre ceux qui l'utilisent pour se protéger et ceux qui veulent « faire du mal ». Ainsi, alors que la posture exclusiviste constitue une réponse à l'altérisation (« je ne fais pas de mal »), elle reproduit en même temps un processus de différenciation et d'altérisation¹¹ à l'égard des pratiques et des personnes (« ce sont eux qui font du Mal ») dont on se démarque. Ce processus de distanciation permet de saisir la question de la reproduction de l'altérisation et des inégalités sociales par les individus stigmatisés et altérisés eux-mêmes (Schwalbe, et al. 2000).

Toutefois, d'autres discours plus intégrateurs coexistent avec cette posture exclusiviste moralement valorisée, tels ceux qui conçoivent la possibilité de l'existence des pratiques de l'*obeah* en excluant toute implication personnelle (« cela existe, mais je n'y crois pas »), ou encore en admettant l'efficacité de l'*obeah* sur autrui ou sur soi-même. De façon générale, la posture exclusiviste offre les meilleures garanties de protection de son statut moral, et c'est un discours largement adopté par la population, même si, concrètement, certaines personnes ont une pratique davantage marquée par l'inclusivité. Ce constat pose la question du décalage entre pratiques et discours, autrement appelé dans la littérature scientifique la question des « inconsistances » entre la formulation d'un discours et la pratique réelle (Heintz 2009).

D'autres réactions à l'altérisation et aux attributions de « sorcellerie » sont possibles : il peut s'agir de déconstruire ces allégations, de les ignorer, de vouloir s'en protéger, ou bien de se les approprier et d'en tirer parti. La déconstruction des rumeurs opère souvent par un dénigrement des allégations proférées, notamment sur la base de leur prétendue irrationalité. Le praticien peut aussi invoquer une forme d'injustice en disant faire le Bien et recevoir du Mal en retour, ce qui revient à accuser les autres d'absence de discernement moral. Quant aux recours judiciaires, ils sont le plus souvent écartés, laissant place à des plaintes effectuées de façon officieuse. Ce constat, aussi effectué par Bougerol (2008) en Guadeloupe, est sans doute lié à la difficulté à fournir des preuves « scientifiques » de l'existence d'une pra-

tique magico-sorcellaire. On assiste donc davantage à des réactions marquées par l'indifférence et le pardon, une posture détachée permettant selon certains de contrecarrer les objectifs recherchés par les personnes accusatrices – à savoir d'entrer dans un rapport de forces. Cette réaction constitue alors un avantage par rapport aux accusateurs, le refus de s'abaisser à des sentiments de rancune illustrant une bonne moralité, voire un sentiment de supériorité morale. Ce détachement semble apprécié, voire recherché, dans la mesure où il apporte aussi des effets positifs, dont une protection découlant des doutes quant aux capacités réelles des personnes accusées. Toutefois, cette indifférence perçue peut également engendrer de nouvelles accusations, car la capacité de se doter de protections magico-sorcellaires est attribuée à des personnes jugées impassibles devant les médisances à leur sujet. Il peut aussi s'agir de mettre en garde face à un éventuel retour de bâton que pourraient connaître les personnes accusatrices, par exemple en accusant directement ces personnes (« celles qui m'accusent sont elles-mêmes impliquées dans l'*obeah* »). La démonstration de sa supériorité – tant morale que sorcellaire – se traduit parfois par une mise au défi adressée aux personnes accusatrices (« attrape-moi si tu peux »).

Quant aux appropriations et aux capitalisations des accusations et de l'altérisation, cela peut consister à se satisfaire de la notoriété induite par les accusations morales et sorcellaires, à constater une attribution croissante d'efficacité magique ou l'acquisition d'un certain pouvoir matériel, symbolique ou social, ou encore à observer une forme de protection dérivant de ces accusations. Tel est précisément le cas des attributions basées sur la marginalité ou sur ladite possession de protections à caractère magico-sorcellaire, adressées à des personnes dont on estime qu'elles se dotent de pouvoirs spéciaux pour se protéger de vols éventuels et qui, conscientes de ces jugements, se satisfont de la protection réelle dont elles disposent grâce à de telles accusations. Cette possible instrumentalisation des attributions constitue une forme de « capitalisation », c'est-à-dire une appropriation d'éléments des discours d'altérisation (Jensen 2011). Il s'agit là d'un processus actif et socialement situé illustrant la capacité d'agir (*agency*) des individus à l'intérieur de normes sociales et morales¹². Cela fait écho aux réappropriations de certains termes péjoratifs pour en développer un usage positif, tels que les termes *queer* (Butler 1993), *gay* (Thurlow 2001), ou « Nègre » au sein du mouvement de la Négritude par exemple (Césaire 1973; Nielsen 2013).

Au sein de la diversité des réactions possibles face aux attributions morales et sorcellaires se déclinant sur

le mode de l'altérisation, deux tendances se dessinent. On assiste d'une part à une reproduction du processus d'altérisation, se traduisant par une mise à distance ou un dénigrement des Autres et donnant lieu à des accusations directes – basées sur une affiliation à l'*obeah*, un manque de rationalité ou une mauvaise moralité par exemple –, à la déconstruction des accusations, à la mise en avant d'une posture détachée ou au démenti. D'autre part, les réponses visent le maintien de son statut moral ou la démonstration de sa supériorité magique et morale. Tel est le cas de l'indifférence – constituant aussi une forme de reproduction – ou des discours visant la surenchère morale et la consolidation de son statut moral en cas de menace ressentie ou prévue. Toutefois, une réaction peut participer à ces deux mouvements, tel le démenti qui peut être associé à la préservation de son statut moral en même temps qu'il contribue à dénigrer la personne accusatrice. Cet approfondissement des réactions face aux attributions morales négatives permet la mise en lumière du caractère actif et dynamique de la réception des valeurs morales et des imputations sorcellaires par les personnes concernées, permettant de dépasser une conception binaire de l'existence des valeurs morales en termes de production / réception. Les postures plus actives (recours judiciaires, mises au défi, mises en garde et menaces, appropriations...) montrent comment la réception des valeurs morales participe de la production de celles-ci, voir contribue à la production de nouvelles moralités.

Conclusion

Cette recherche a démontré que les discours sur l'*obeah* attestent d'enjeux de différenciation sociale (historique, linguistique, géographique, socio-économique et ethno-culturelle) qui doivent être analysés conjointement à une mise à distance morale. Et c'est à travers le concept d'altérisation que le lien systématique entre différenciation sociale et moralisation est développé. Les personnes altérisées seront davantage susceptibles d'être dénigrées, stigmatisées, socialement exclues et plus à même d'être associées à la « sorcellerie » et à des pratiques moralement mauvaises. Cette perspective permet de saisir le renvoi de la « sorcellerie » à « la pratique des Autres » (Rio 2003) ou à la « croyance de l'autre » (Favret-Saada 1977). De plus, cet article démontre la nécessité d'intégrer au concept d'altérisation les réactions et réponses à ce phénomène, associant ainsi perspective interne et externe. Il faut en effet davantage prêter attention au point de vue des personnes altérisées, et ce, non plus dans une perspective de victimisation ou axée sur la reproduction de l'altérisation, mais plutôt dirigée vers

la participation de telles réactions à la construction de nouveaux rapports sociaux et de nouvelles moralités.

Le concept d'altérisation doit être réhabilité en anthropologie et plus largement en sciences sociales, afin de répondre à une exigence de visibilité des processus de (re)construction de ladite altérité. En effet, alors que l'altérité est au fondement même de la discipline anthropologique, il est regrettable que les processus à l'œuvre dans cette production soient peu étudiés dans cette discipline. Ce concept devrait être appliqué, non plus seulement au plan individuel ou identitaire ou dans le domaine des relations multiculturelles, mais encore de façon plus générale aux phénomènes de stigmatisation, de mise à distance sociale et d'attribution de caractéristiques morales négatives. Le concept d'altérisation, utilisé au départ pour qualifier un processus de différenciation sociale, doit prendre en compte simultanément les dimensions sociales et morales d'un phénomène, afin de saisir ce qui se joue moralement dans cette disqualification, ces discours accusateurs et ces pratiques discriminantes. Il s'agit dès lors de refuser de parler d'altérité en anthropologie – au profit de l'emploi du terme « altérisation » – ce qui consiste à faire acte d'une nécessaire « déprise » épistémologique (Mignolo 2013). Pour ce faire, l'approche privilégiant l'étude des aspects ordinaires, dynamiques et situationnels des rapports sociaux, de l'éthique et des moralités (Caton 2010; Lambek 2010b) devient pertinente. Cette approche en terme d'altérisation rend possible l'appréhension globale d'un phénomène complexe et diffus comme celui de la moralisation négative de l'*obeah* et plus largement des pratiques associées à la « sorcellerie » dans l'aire caribéenne.

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Notes

- 1 Ce constat est effectué par plusieurs auteurs (Bhabha 1994; Bhattacharya 2009; Coupland 1999; Harrison 1991; Kilani 2000; Traustadóttir 2001; Trouillot 2003). Le caractère essentialiste ou réductionniste de l'altérité s'exprime notamment à travers l'utilisation du concept de culture (Fassin 2001) et ses dimensions impérialistes sont rappelées par exemple par Mafeje (1998:96), lequel se demande « si une anthropologie fondée sur 'l'altérité' peut éviter d'être raciste ».
- 2 Ces réflexions sur l'altérisation dépassent une analyse de la production de la différence, car l'altérisation existe quand des individus ou des groupes se voient dénier un statut clairement défini et donc lorsqu'ils sont mis à distance. En ce sens, « *the other is not only different or distant but also alien and deviant* » (Coupland 1999:5).
- 3 Cette situation n'est pas spécifique à la société saint-lucienne, même si le caractère illégitime de la pratique associée à l'*obeah* semble s'incarner de façon particulière dans cette société. Ma recherche doctorale porte sur l'étude systématique du langage de l'*obeah*, de ce que revêt l'usage de ce terme lorsqu'il est attribué à des personnes ou des pratiques et plus rarement lorsqu'il sert d'identification. Davantage utilisé comme jugement moral à Sainte-Lucie, dans un contexte où presque tout le monde dément une quelconque affiliation à l'*obeah*, l'usage du terme *obeah* au sein des écrits des sciences sociales doit être questionné (Meudec 2015b).
- 4 Le choix de l'expression « de/associé » est motivé par la volonté d'inclure à la fois une perspective interne et externe de l'*obeah*, considérant ensemble les processus d'attribution et d'identification. Elle désigne ainsi les personnes qui se voient attribuer la pratique de l'*obeah* ainsi que celles, peu nombreuses, qui se réclament de cette pratique.
- 5 Ce processus d'altérisation visant l'Afrique et Haïti, et ce qui y est associé, ne porte sur des éléments spécifiques, ou en tout cas identifiables de façon absolue. Il fonctionne plutôt à travers l'attribution – suivant un processus mêlant assimilation et contagion morale (voir plus loin dans le texte) – de caractéristiques négatives à tout ce qui est (dit) Africain / Haïtien, les éléments retenus étant variables selon les situations observées.
- 6 Dans le cas de Trinidad et Tobago, Forde (2012) évoque ce décalage entre un ensemble de représentations et les faits en termes de « mystifications » de l'*obeah*, là où ces pratiques sont localisées en milieu rural et éloigné, alors que la majorité des personnes accusées de pratiquer l'*obeah* vivent en ville.
- 7 Selon une enquête du Gouvernement de Sainte-Lucie, intitulée *The Assessment of poverty in St. Lucia, vol III, The Quantitative Assessment of Poverty in St. Lucia* (2006:24), les personnes indigentes, pauvres et vulnérables sont entre 87% et 94% des descendants d'Africains (Ethnicity African Descent/Negro/Black) et environ 3% sont des personnes d'origine indienne.
- 8 Du point de vue des personnes qui renvoient les origines de l'*obeah* essentiellement à l'Afrique, la possibilité de l'existence de pratiques similaires dans d'autres régions du monde (Amériques, Europe) sera souvent exclue et le

processus d'adaptation des esclaves et de leurs descendants au contact des autres groupes en présence (Autochtones, Européens, Indiens) sera aussi minimisé.

- 9 Le premier terme, signifiant littéralement « vieux nègre », est défini de façon restrictive par « personne irresponsable » (Frank 2001). Dans les faits, son utilisation courante reflète un fort contenu moral et pourrait être traduit par « personne jugée mauvaise ». Quant à celui de *moun djiné*, la définition donnée par Frank (2001) renvoie uniquement au phénotype et non à une appartenance ethnoculturelle : « *djiné* : *person with very dark, blue-black skin (see also : nèg)* ». À Ste-Lucie, cette catégorisation ethnique (*moun djiné*) utilisée pour qualifier les personnes descendantes directes d'Afrique dispose souvent d'une connotation péjorative, ce qui fait que cette origine est très peu revendiquée, suscitant plutôt de la honte et du déni.
- 10 Ce constat rejoint les propos de Putnam (2012:245), laquelle montre qu'au début du 20^e siècle, « l'africanité (*Africanness*) de l'*obeah* était tenue pour acquise » par les « observateurs blancs », alors que l'*obeah* tel que pratiqué par les Caribéens regroupait un ensemble hétérogène d'éléments composés d'inspirations française, européenne et orientale (Égypte et Inde). Une réflexion sur l'« africanité » d'autres pratiques spirituelles caribéennes, *santería* et *regla de ocha*, est brillamment développée par Palmié (2013) dans son dernier ouvrage.
- 11 Putnam (2012:244) interprète ce phénomène en termes de « perspective duale », présente notamment chez des personnes disant recourir à l'*obeah* pour la guérison, la protection ou la justice et affirmant en même temps que d'autres vont y recourir de façon malintentionnée.
- 12 Les expressions de la capacité d'agir ou de l'agencéité (*agency*) sont développés ailleurs en termes de résistance morale (Meudec 2015b), ce qui renvoie à toute forme de réaction à la différenciation sociale et morale qui ne contribue pas directement à la reproduction de l'altérisation, soit le « laisser-faire », le démenti, la mise au défi, la capitalisation.

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Museum Review

“The Future Looks Rad from Where I Stand”: A Review of *Claiming Space: Voices of Urban Aboriginal Youth* at the UBC Museum of Anthropology

Kristin L. Dowell *University of Oklahoma*

In memory of Zaccheus Jackson

On 1 June 2014 over seven hundred people crowded into the Great Hall of the University of British Columbia Museum of Anthropology (MOA) to celebrate the opening of *Claiming Space: Voices of Urban Aboriginal Youth*. The Great Hall, typically a quiet and contemplative space, which houses monumental totem poles, was animated by young Aboriginal poets, dancers, performers and musicians who energized the crowd in celebration of this exhibition. Spoken-word artist Zaccheus Jackson delivered a powerful series of pieces that spoke of his difficult experiences growing up, while remarking on the inspiration that he draws from the Aboriginal youth he mentored through his involvement with the Overly Creative Minds studio of the Urban Native Youth Association in Vancouver, British Columbia. Pop singer Inez performed several songs with messages of empowerment, particularly for young women, bringing the audience out of their chairs and onto the dance floor. A highlight of the opening events included a special performance by the Aboriginal audiovisual collective Skookum Sound System in the rotunda housing Bill Reid's permanently installed sculpture, *Raven and the First Men*;¹ this was the first media art performance given permission by MOA staff to take place in this rotunda. Projecting vibrant visuals onto *Raven and the First Men* and performing electronic and hip hop DJ sets, Skookum Sound System brought a distinctly urban Aboriginal sensibility to the space, reimagining the iconic *Raven and the First Men* through their own articulation of what indigeneity means to them as members of a younger generation of Aboriginal artists and cultural performers (See Figure 1).

As a visual anthropologist, I have conducted research with Vancouver's urban Aboriginal media community for over 12 years, analyzing how Aboriginal filmmakers use media technology to articulate visual sovereignty on- and off-screen (Dowell 2013). I scheduled a research trip to Vancouver to attend the *Claiming Space* opening, and

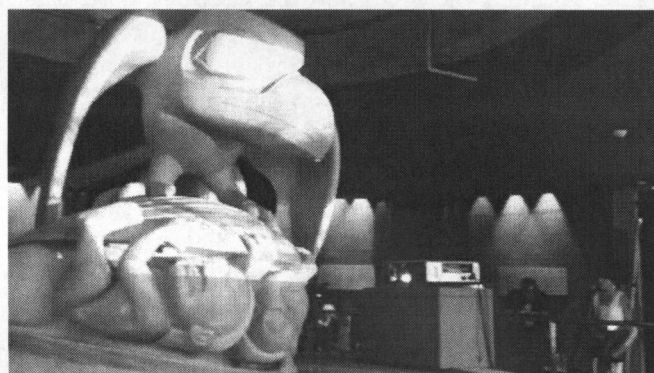


Figure 1: Skookum Sound System performing at the *Claiming Space* opening, 1 June 2014. Photo courtesy of the Museum of Anthropology.

I am certainly thankful that I did, as the atmosphere was electric and palpable. In her blog review, Secwepmec artist and curator Tania Willard described this energy, noting that “this exhibition and project, *Claiming Space*, feels epic and full and alive!” (Willard 2014). I left the opening immensely moved and impressed by these artists and excited that the halls of MOA were brought to life through the work of urban Aboriginal youth, a group who do not often have access to public venues such as museums to articulate their diverse experiences and perspectives. In this article I review the *Claiming Space* exhibit as an example of visual sovereignty, emphasizing the significant impacts of this exhibit, particularly with regard to media art, the strong presence of Aboriginal young women artists and the deep links to cultural traditions found within the artists' innovative aesthetic forms.

Introduction

Curated by Pam Brown and curatorial assistant Elle-Máijá Tailfeathers, *Claiming Space* is the first urban Aboriginal youth art exhibit at the MOA; it featured over 50 contemporary art works by 28 artists, ages 15

to 25, from Canada, the United States, New Zealand and Norway. Four years in the making, this exhibit drew on the MOA's long history of work with Aboriginal youth through their Native Youth Program (NYP), which has been in existence for 35 years. The NYP is a work-study summer program for high school students offering an opportunity to learn about museum exhibition and collection practices, while gaining public presentation skills as tour guides at the museum. Several artworks featured in *Claiming Space* were made by NYP alumni. The *Claiming Space* curatorial team also honoured the Musqueam First Nation—on whose ancestral and unceded territory the MOA and the University of British Columbia campus sit—through the inclusion of artworks made by Musqueam youth and through collaboration on a concurrent sister exhibit held at the Musqueam Cultural Centre, entitled *Musqueam Youth Claiming Space*.

Exploring connections to urban life and ancestral territories, *Claiming Space* offered viewers unfiltered and uncensored access to the voices and experiences of urban Aboriginal youth artists. In my interviews with Pam Brown and Elle-Máijá Tailfeathers, it was clear that their foremost priority was to allow the voices of the artists to come through and not to impose their own ideas or to change the artist's voices. Elle-Máijá Tailfeathers emphasized that “for Pam and me, it was really important to privilege the voices of Aboriginal youth and to make sure it was their voices guiding the project” (interview, 9 October 2014). This emphasis on constructing the exhibit through the artists' own voices was evident in the curatorial themes of the show, all of which were taken from the titles of specific artworks or from phrases in artists' statements. The five overarching themes—“The Indigenous Sprawl,” “We Are Culture,” “Adapting Our Traditions,” “The Gaze” and “We Are the Keepers”—were printed on banners hanging in the gallery space to demarcate the specific sections of the exhibit.

The curators hoped that the exhibit would provide a space for dialogue around issues facing urban Aboriginal youth and that the diverse range of Aboriginal youth voices would be showcased. Their curatorial statement asserts that “these works resist any singular statement about what it means to be an urban Aboriginal youth today. Their art tells us that identity is plural, fluid and escapes externally imposed definitions. Yet within this diversity, we find a unified spirit connected by a deep love for cultural origins” (*Claiming Space* 2014). In my interview with Vuntut Gwitchin artist Jeneen Frei Njootli, she emphasized the representation of diverse urban Aboriginal youth voices within *Claiming Space*, observing that “the exhibition shows that there are a

multiplicity of complex experiences of what it means to be an Indigenous youth, and the work that is coming out of those experiences is hugely important” (interview, 18 October 2014). The diversity of artists' perspectives was also reflected in the vast array of mediums represented in the show, ranging from new media and text-based art to hand drums, weaving, painting, photography and multimedia installations.

Aboriginal Art and Media in the Urban Landscape

One of the striking things about the exhibit is that over half of the artworks are media-based. In fact, this exhibit is the most media-heavy exhibit ever staged at the MOA, and it required every single piece of media technology available at the MOA to install the exhibit. The exhibit designer, Skooker Broome, did an impeccable job working in the long and narrow gallery space to install media displays and podiums housing iPads on which to view the short films as well as two multimedia installation works and two video projections. Pam Brown and Elle-Máijá Tailfeathers were not surprised by the large amount of media art in the show, noting that this is “reflective of the reality of Indigenous youth today” (interview, 9 October 2014) and that “media is a good way for youth to communicate because it is a medium they are comfortable with” (interview, 23 September 2014).

One of the most powerful artworks on display in *Claiming Space* is a multimedia video installation entitled *Musqueam Youth Reclaiming Spaces* (2014), created by an artist collective including Kelsey Sparrow, Brittany Point, Christopher Fossella and Dylan Wijdenes-Charles, who were mentored by Musqueam artist Christie Charles and assisted by Terry Point (See Figure 2).

The installation includes video footage of the artists dressed in Musqueam regalia visiting sites in Vancouver that are culturally and ceremonially significant to the Musqueam people. The artists are seen engaging with these sites through activities that are reflective of Musqueam cultural identity; for example, one scene shows a young woman using a black metal fence as a loom, turning the city fence into a Musqueam weaving. The centrality of weaving to Musqueam identity is also evident in the choice to display this video onto four long rectangular panels that hang from a pole, making the entire video installation reminiscent of the way in which Musqueam weaving is often hung on the wall. The audio track fills the gallery space with the Musqueam language, drumming and singing, so that this piece both visually and aurally claims the gallery space as Musqueam space.

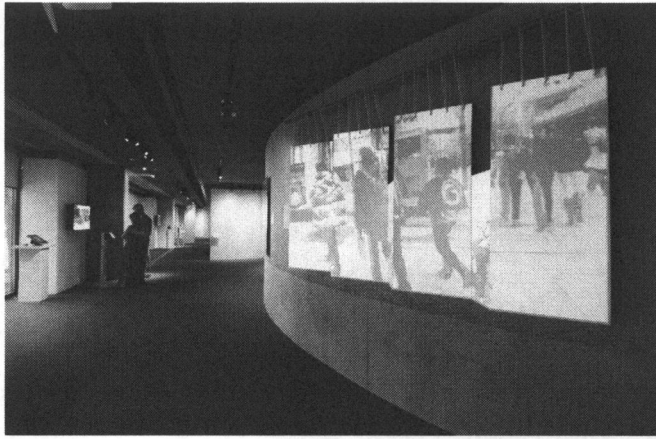


Figure 2: Image of *Musqueam Youth Reclaiming Spaces* (2014) multimedia installation artwork. Featuring artists Kelsey Sparrow, Brittany Point, Dylan Wijdenes-Charles, and Christopher Fossella. Artist/mentor: Christie Charles. Curator: Terry Point. Photo courtesy of the Museum of Anthropology.

On the opposite wall from *Musqueam Youth Reclaiming Spaces* is the stunning and impressive 20-foot black-and-white painted mural from the Urban Native Youth Association's Overly Creative Minds studio, made under the guidance of artist Marie Wustner. Entitled *Reflections of the Indigenous Sprawl*, this mural took two years to complete, with over 30 Aboriginal youth participating in the painting process (See Figure 3).

The stark black-and-white images stretching across the canvas represent an Aboriginal canoe in the waters in front of the mountain backdrop and city skyline of Vancouver. Aesthetically, this mural reflects the diversity of the intertribal urban Aboriginal community of Vancouver and powerfully proclaims Vancouver as an Indigenous city. In an interview Marie Wustner explained:



Figure 3: *Reflections of the Indigenous Sprawl* (2014), made by artists with the Urban Native Youth Association's Overly Creative Minds studio, under the guidance of artist Marie Wustner. Major contributing youth artists: Johnny Yooya, Jessica Bennett, Elvis Chevrefils, Larissa Eliot, Dustin McGladry, Rae-Anne LeBrun, Paul Alexander, Louie Alexander. Special thanks to Beau Dick for contribution of the original moon design. Photo courtesy of the Museum of Anthropology.

We decided to sit down and design a mural that we all thought reflected the Aboriginal youth experience here in Canada, specifically in Vancouver. Our youth come from all over the place either by themselves or with their family. Slowly they integrate into city life. Eventually they become urbanized and gain a unique perspective on this place. [Interview, October 15, 2014]

Reflections of the Indigenous Sprawl and *Musqueam Youth Reclaiming Spaces* illustrate the significance of the urban experience to Aboriginal youth, recognizing that 56 per cent of the Aboriginal population in Canada now lives in urban areas (Statistics Canada 2011). In an essay, Cree-Métis filmmaker and urban geographer Kamala Todd asks, "How do we increase the presence of Aboriginal perspectives and aesthetics on the land? How do we build a more inclusive city in which Aboriginal people have a significant role in shaping how we live?" (Todd 2011: 2). I contend that media artworks, such as *Reflections of the Indigenous Sprawl* and *Musqueam Youth Reclaiming Spaces*, help to build a space for visibility of urban Aboriginal youth experiences, voices that are not often heard or seen in other venues.

An artwork that explores the experiences of indigeneity among global Indigenous youth is the video installation piece *Giesan Giesan* by Sámi artist Márjá Bål Nango. In this installation, a digital film showing Nango putting on a pair of boots and wrapping fabric around her ankles is projected onto a pair of Sámi boots from the MOA collection housed in a glass vitrine. Nango was drawn to this particular pair of boots because they are from her region of Sámi land. Writing about the inspiration for this piece in her artist statement, Nango explains that the artwork urges "museum visitors to understand that these boots, *čázehat*, are not just relics in a museum. They are still a valid part of Sámi identity, worn by Sámi people, young and old, either with tradi-

tional dress or paired with contemporary clothing.” The way in which indigeneity is negotiated through cultural objects and Indigenous art was also echoed in my conversation with artist Jeneen Frei Njootli, whose artworks *Wolf Cloak* and *Untitled* video projection are included in *Claiming Space*. When I asked Njootli about the link between her art and identity, she expressed hesitation about the way in which Indigenous artists’ work is often labelled and defined through identity. She remarked:

My work has been very interested in identity politics but maybe that is just what I have been told. I have been realizing that the word *identity* is used a lot in relation to indigenous artwork, even if it doesn’t claim to be about that or the artist does not frame their work/practice like that. Identity ... it’s like a blanket that can be placed on work made by ‘the other.’ (interview, October 18, 2014)

Just as the media artists in the exhibit resist the labels that dominant society places on them and their art, the artists featured in the section “The Gaze” forcefully and fearlessly critique the objectification of Aboriginal women within dominant Canadian society, reclaiming an empowered space for Aboriginal women today.

Critiquing the Objectification of Aboriginal Women

Aboriginal young women make up 80 per cent of the artists within *Claiming Space*, a statistic that speaks to the rising role of women as leaders within Aboriginal arts and cultural production. The artists featured in the section “The Gaze” confront the objectification and sexualization of Aboriginal women’s bodies within dominant society, while also exploring the strong role of women in Aboriginal society today. The large number of murdered and missing Aboriginal women in Canada and the disproportionately high rates of violence and sexual assault against Native women in the United States and Canada are issues at the forefront of Aboriginal activism, particularly among Aboriginal youth. The text panel for “The Gaze” proclaims:

Over the last three decades, more than 800 Aboriginal women in Canada have gone missing or been murdered. These women were more than just statistics: they were mothers, daughters, sisters, aunts, cousins and friends. They were women, young and old, whose deaths and disappearances deeply affect Aboriginal communities. Over half of these cases have not been solved.

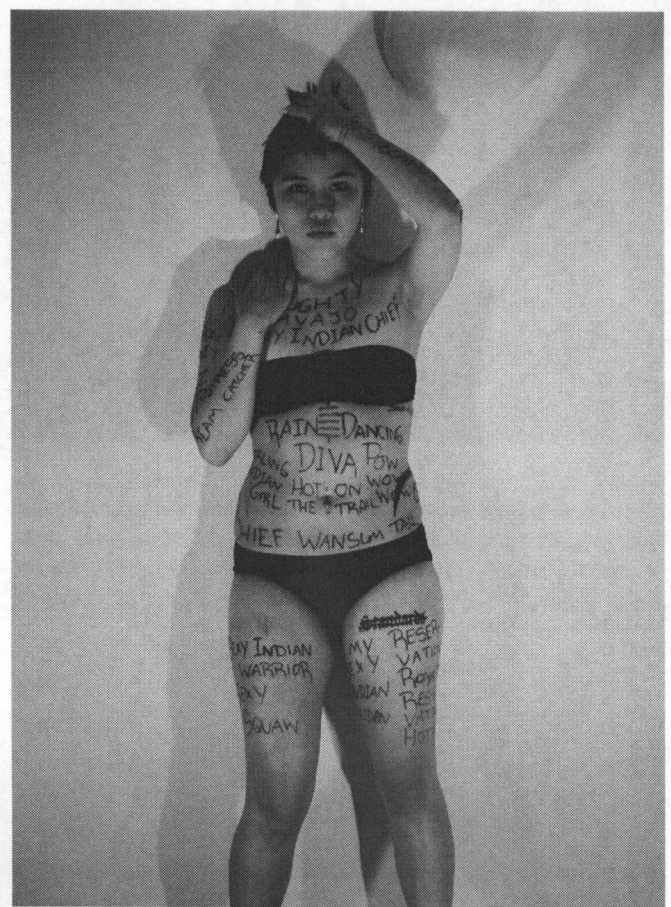


Figure 4: *Untitled* (2013) digital photograph by Ellena Neel. Photo courtesy of the Museum of Anthropology.

Kwakwaka’wakw/Nuu-chah-nulth artist Ellena Neel’s *Untitled* art work critiques the objectification of Aboriginal women by writing the names of Halloween costumes from online stores, such as “Sexy Squaw” and “My Sexy Indian Maiden,” in permanent black ink across her body and then photographing herself in a self-portrait (See Figure 4). Neel gazes defiantly into the camera and out from the frame to issue a searing challenge to those who would reduce Aboriginal women to these harmful stereotypes.

In an interview Neel explained, “These seemingly harmless everyday words are not words that exist in the physical realm but wrap around the body of Native women, making them exotic sexual objects on their own land. This has led to the unjust physical and sexual abuse of Native women, statistically higher than any other racial group.” (interview, October 10, 2014)

Tsimshian artist Kelli Clifton also forcefully critiques the objectification of Aboriginal women through her work *The Male Gaze*, which features 48 Northwest Coast form-line eyes painted in teal against a red background. This

visually striking painting (gracing this issue's cover) represents a fusion of Op Art and Northwest Coast formline tradition, and the juxtaposition of the two colours results in an optical illusion and disorienting shimmering effect. Clifton studied colour theory to discover the perfect combination of colours to create this effect; in an interview she explained:

I wanted the viewer to stand in front of it and, as they were looking top to bottom of it, they are actually mimicking the exact motion that men often make towards women when checking them out. So at the same time there is this optical effect where the painting is flashing at you and making the viewer feel that feeling of discomfort that women often feel when being gazed upon. (interview, September 29, 2014)

Clifton's interest in evoking a visceral response among viewers extends her painting into a performative realm. Her desire to create an emotional reaction of discomfort in viewers to generate greater empathy illustrates her hope that "viewers are able to see these subject matters in a different light and that art can speak directly to people differently than if they were to read an article or see something on the news, it makes you feel something in a different way and that's what I hope to achieve with *The Male Gaze*" (interview, September 29, 2014).

Jeneen Frei Njootli's *Untitled* video also explores the objectification of Aboriginal women's bodies, as well as the role of Aboriginal women's textile arts. In her two-minute black- and-white video Njootli is seen placing a fabric with a traditional pattern over her head while wrapping a strand of black rickrack around her neck. The cloth covers her face and hangs down over her body. Using scissors she cuts out small circles over her left and right breasts so that her breasts are the only part of her body visible through the fabric. This work is both performance art and a video projection. Performance art is a particularly apt medium for Aboriginal artists seeking to critique and explore the ways in which Aboriginal bodies have been objectified and disciplined throughout the history of Canadian settler colonialism. Artists and scholars Dana Claxton and Tania Willard (2012) have described Aboriginal performance art "as a creative intervention of the oppression of Aboriginal people(s)." In Njootli's *Untitled* video, the performance intervention involves a gesture that brings to the surface the various ways in which Aboriginal women's bodies have been sexualized and objectified. In her artist's statement, Njootli proclaims, "This video work speaks to the fetishization of Indigenous women, while questioning our relationships to textiles, trade and the history embodied in materials." The works dis-

cussed here illustrate Elle-Máíjá Tailfeathers' observation that "it's really women who are at the front lines of community work of the arts right now and I think it speaks to the courage of young Indigenous women today" (interview, October 9, 2014).

"We Are the Keepers"

A prominent theme within *Claiming Space* is the numerous ways in which Aboriginal young artists are profoundly connected to their cultural traditions, while also innovating within those same traditions. The artists in the exhibition express a sense of responsibility to maintain cultural ways of life, while emphatically asserting that culture is dynamic and constantly in flux. This deep connection to place and to community is significantly linked to family ties and ceremonial responsibilities that come from their lineages and clan and house obligations. Several artists in the exhibit come from families of artists whose art is included in the permanent collection of the MOA. For example, in an interview Ellena Neel, who was named after her ancestor Ellen Neel, one of the first Kwakwaka'wakw women carvers, proudly proclaimed: "I am a 6th generation artist from the Neel family, stemming from Charlie James. My dad has done art most of his life and he has always reinforced this idea that I come from a long line of artists" (interview, October 10, 2014).

Several artists in the show adapt cultural traditions or integrate innovative materials into their art. Stól:ō/Squamish artist Danielle Morsette's *Coast Salish Potlatch Dress* (2013) includes unique design patterns incorporating cedar bark weaving with wool weaving practices (See Figure 5).

She demonstrates impeccable weaving skills while showing that this dress circulates as an art object that can also be worn for ceremonial purposes. In her artist's statement, which was on display at the exhibit, Morsette explains, "This dress is very contemporary, although traditionally inspired by wool and cedar-bark weaving. I wanted to create this dress to show that Coast Salish weaving still has room to advance while done tastefully and true to the art form." This sense of expanding or adapting while still honouring cultural traditions is evident throughout many of the artists' statements. In a museum text panel Kelsey Sparrow asserts, "As First Nations people, we have always adapted our traditions, from before contact to the present day." The curatorial text panel for this exhibit reminds viewers that "through their work, these artists are helping to ensure that traditional practices are no less powerful and meaningful to contemporary youth than they were for their ancestors."

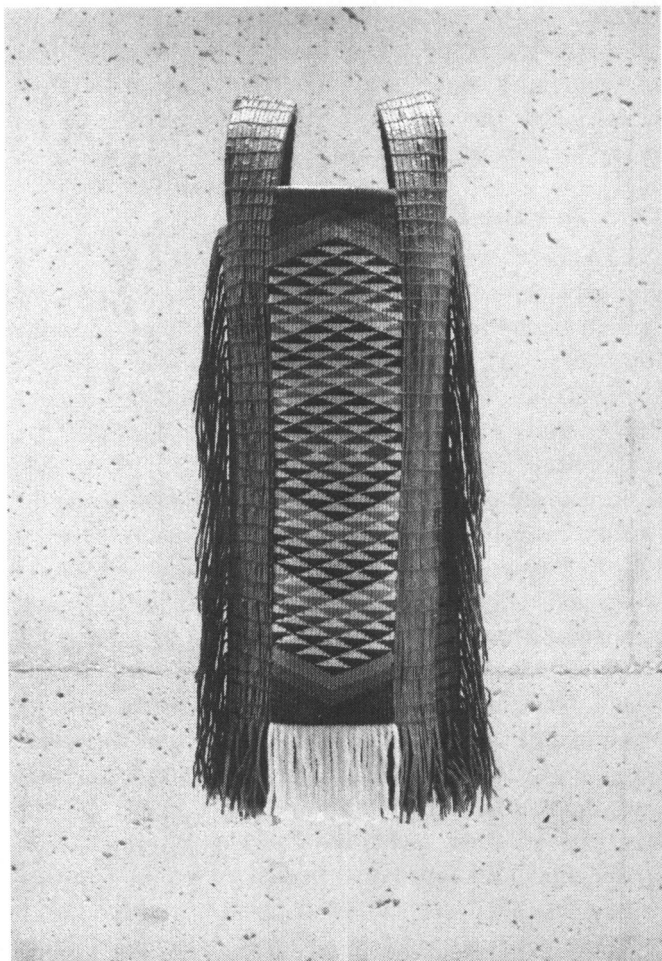


Figure 5: *Coast Salish Potlatch Dress* (2013) by Danielle Morsette. Photo courtesy of the Museum of Anthropology.

This sense of innovation within cultural continuity is also evident in Mi'kmaq artist Raymond Caplin's *Traditional Healing* (2012) and Musqueam artist Diamond Point's *Emerging Strength* (2011) featured at the close of the exhibit. *Traditional Healing* is a short two-minute animated video that shows a young Aboriginal woman arriving in the woods near a bleak, black-and-white urban landscape. The young woman looks around the space as a factory spews smoke into the air against the city skyline and polluted water flows out of a drain into the woods. The audio track is filled with the sounds of a bustling city with car horns and sirens. She frowns and then begins dancing a fancy shawl dance; as she dances, the woods around her spring to life in vivid colours. I see this film as a powerful statement about the importance of Aboriginal cultural traditions to environmental issues, as well as the role of the younger generation in helping to keep those traditions and values alive. In his artist statement Caplin explained, "I wanted

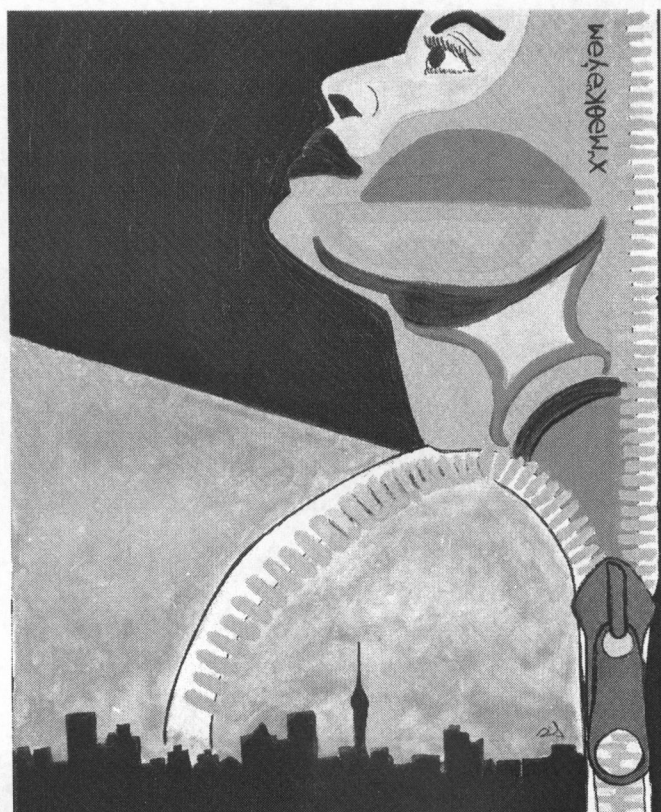


Figure 6: *Emerging Strength* (2011) by Diamond Point. Photo courtesy of the Museum of Anthropology.

to develop a story about my Aboriginal origins and my cultures, as well as the concerns we all have about the state of the environment. My culture is part of me, my identity and Mother Earth is what keeps us alive and part of us all."

Diamond Point's painting *Emerging Strength* (2011) is the last artwork that visitors see before exiting the exhibit. Drawing inspiration from the Inuit print *Shaman Revealed* by Ningeokuluk Teevee in the MOA permanent collection, Point created a painting with a Coast Salish woman emerging from the skyline of Vancouver (See Figure 6). This striking visual image claims the space of Vancouver as a Musqueam space, envisioning the backbone of the city as a Coast Salish woman.

In her artist statement Point explains, "I used the zipper theme from *Shaman Revealed* to show how this woman is unzipping the exterior façade of the city to show her true self as a strong Aboriginal person. This piece shows that, no matter where I go or who I become in my life, I will always be aware that I am Musqueam." The curators aimed to leave visitors with a positive and powerful message with *Emerging Strength*; as Elle-Máijá Tailfeathers remarked, "We just thought this piece was so fitting to send people off, because we know

there are so many difficult topics tackled in the show and the youth so eloquently bring these issues to light but we wanted people to leave on a positive note and recognize the strength of Aboriginal youth and where they are today" (interview, October 9, 2014). The *Claiming Space* exhibit has had a tremendous impact on the curatorial team, the artists involved in the exhibit and certainly the visitors coming through the exhibit, providing a significant and landmark venue to highlight the voices and art of Aboriginal youth.

The Impact of *Claiming Space*

The curators behind *Claiming Space* wanted the exhibit to be accessible to a wide audience and to be as engaging and interactive as possible. In contrast to some museums that restrict photography, the *Claiming Space* team encouraged visitors not only to photograph artworks but also to share their photos via social media. These, along with comments in the guest books and on the *Claiming Space* blog and website, suggest that the impact of *Claiming Space* has been deep and wide, reaching international tourists, non-Aboriginal and Aboriginal Canadian visitors alike.² Senja, a visitor from Finland, commented that the exhibit "opened my eyes to a totally different point of view. Thank you," while an anonymous visitor remarked, "Very powerful exhibit. Really accessible and meaningful not just for adults but children as well. Thank you." A visitor from Italy remarked, "Very interesting! Poetic and political." Pam Brown, Elle-Máíjá Tailfeathers and other members of the MOA's education department led dozens of guided tours through the exhibit for high school, university and adult education courses.

Many Aboriginal visitors commented on the pride they felt in viewing the exhibit. Brandon Gabriel Kwelexwecten from the Kwantlen First Nation of Fort Langley, British Columbia, remarked, "I loved the exhibition. I'm proud of our Indigenous Youth creating timely, evocative and important critical pieces of work. Hats off to all!" In talking about the impact of the exhibit, curator Pam Brown declared, "I think it makes them proud to be an Aboriginal youth because they are telling their own stories. I've gotten a lot of comments from people that they like the show because they can relate to it" (interview, September 23, 2014). This fierce sense of pride is apparent throughout visitor comments, particularly from Aboriginal visitors. One visitor wrote, "Incredibly moving. I feel choked up thinking of my ancestors. Thank you," while another visitor from Toronto commented, "Native young people show me a ray of hope for us and our environment," a sentiment echoed

by Neil from Aotearoa (New Zealand), who wrote, "Claiming Space is a window to hope and inspiring."

The *Claiming Space* exhibit impacted not only visitors but also the artists and curators. The exhibit offered an opportunity for the artists to meet one another and to network among their peers. For example, in an interview Jeneen Frei Njootli discussed the importance of *Claiming Space* in helping her to feel connected to the Aboriginal art world in Vancouver, noting, "I think *Claiming Space* has had a really positive impact, it has for me. It has helped me to feel more connected here and like there is a space for me at this huge institution, a place to feel welcomed and less alienated" (interview, October 18, 2014). Both Pam Brown and Elle-Máíjá Tailfeathers talked about the importance of the exhibit as a celebration of the voices of Aboriginal youth. Tailfeathers described the impact of her role in the curatorial process, proclaiming, "I am so incredibly honoured to have worked on this project and there were so many times where I was just so deeply moved by how powerful these pieces of art are" (interview, October 9, 2014). Brown hopes that the exhibit has provided "a better understanding of urban Aboriginal youth and the issues they face every day. I think visitors are made more aware of what is going on and why things are happening because the artists are very honest and straightforward about that they think" (interview, September 23, 2014). Sámi artist Márjá Bål Nango contends *Claiming Space* shows that "Indigenous youth are engaged and dare to criticize and be political and that the Indigenous youth experience is quite similar across nations" (interview, November 8, 2014). Ellena Neel feels that the exhibit is empowering for Aboriginal youth to see "other youth participating and reconnecting to their culture and actively living it," (interview, October 10, 2014) while Kelli Clifton appreciated this exhibition "because it is speaking to issues that are current in today's world and they really do give Aboriginal youth a voice and a chance to share their own stories" (interview, September 29, 2014).

Conclusion: Looking Forward

Providing a platform for Aboriginal youth voices to articulate their perspectives on cultural traditions and indigeneity in the 21st century, particularly from urban perspectives, is a landmark achievement of *Claiming Space* at the MOA. Danielle Morsette proclaimed, "It's not every day where there is an exhibition dedicated to young artists who most likely are not very known to the public or the art world. I was overjoyed completely to be part of it, I still am. It is a unique exhibition that only comes around every once in a while" (Watson 2014). In

reviewing *Claiming Space*, Tania Willard emphatically proclaimed, "I see rebels here—claiming space. I see our future. THE FUTURE IS INDIGENOUS" (Willard 2014). That this exhibit highlighted Aboriginal youth voices and emphasized the future of Aboriginal artistic expression is a radical exhibition practice, particularly when museums often position Aboriginal people as part of the past. One visitor remarked on this, noting, "People think of Aboriginal as something historical, in the past ... this exhibition brings it a voice in the present looking to the future." The horizon of Aboriginal futures shines brightly within *Claiming Space*, an exhibit that left me with a deep appreciation for the cutting-edge, fresh and innovative voices and visions of this younger generation of Aboriginal artists. When I asked Jeneen Frei Njootli about the impact of *Claiming Space* she declared, "This exhibit is the future and the future looks rad from where I stand, when I stand in that exhibit" (interview, 18 October 2014). I could not agree more.

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Notes

- 1 *Raven and the First Men* was carved out of a block of yellow cedar by renowned Haida artist Bill Reid, along with other assistant carvers, and was completed in 1980. It depicts a portion of the Haida creation story and is one of the most visited artworks in the MOA, prominently featured in its own rotunda. This sculpture is an iconic representation of Northwest Coast art and was also featured on the back of the Canadian \$20 banknote from 2004 to 2012.
- 2 I highly encourage readers to visit the *Claiming Space* website at <http://moa.ubc.ca/claimingspace/>

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Review Essay

Scholasticism versus Discovery in Kinship Studies: Review of Maurice Godelier's *The Metamorphoses of Kinship*

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Abstract: Maurice Godelier's supposedly comprehensive treatment of kinship studies is in fact decidedly truncated: it derives less from an earnest concern with kinship as a human phenomenon and more from established conventions of textbook writing. In particular, it overemphasizes typologies derived from alliance theory and descent theory and, at the same time, pays almost no attention to real discoveries, particularly concerning kinship semantics and the genesis of incest taboos.

Keywords: kinship, extensionism, typology vs. discovery, alliance theory, descent theory

Résumé : Le traitement prétendument compréhensif des études de parenté que propose Maurice Godelier est, en vérité, tronqué : en effet, celui-ci découle moins d'une véritable préoccupation pour la parenté comme phénomène humain, que des conventions établies dans l'écriture des manuels. De manière précise, la méthode de Godelier met trop l'accent sur les typologies dérivées des théories de l'alliance et de la descendance alors qu'en même temps, elle n'accorde presque aucune attention aux véritables découvertes, en particulier celles qui touchent aux champs sémantiques de la parenté et à la genèse du tabou de l'inceste.

Mots-clés : parenté, compréhensif, typologie ou découverte, théorie de l'alliance, théorie de la descendance

Maurice Godelier, *The Metamorphoses of Kinship*, New York: Verso, 2011, 638 pages.

Introduction

Before reading this book, I read a laudatory review of it by Sir Jack Goody (2005). So, I thought, when an eminent anthropologist praises a work by another eminent anthropologist, I would be in for a major intellectual treat. I was, to say the least, disappointed. But before I give my reasons for this contrarian response, I need to say the obvious—that is, that any book must be evaluated on the basis of how well, in the reviewer's opinion, it meets its stated goals. This is not easy here, for Maurice Godelier nowhere expressly tells us what these marks are. Nor does Sir Jack, though he *does* imply that it is a major synthesis of what we know about human kinship. So, it is on this basis that I shall attempt to assess it. I want to add, to make my critical remarks more comprehensible, that, by my lights, the primary job of an anthropologist is to find out things about parts of this world and communicate his/her findings to colleagues, students and the general public. It is *not* many other things—chief among these, for present purposes, parading typologies, usually based on outworn ethnographic understandings, for their own sake, as if the cultural world consists of instantiations of types, the Words, so to say, Made Flesh.

Filiation and Descent

Godelier breaks down kinship into several “components,” the first of which is “filiation and descent.” The latter is mostly organized into a unilineal/cognatic dichotomy,¹ a vestige of kinship studies *circa* 1960, when Murdock (1960) tried to untangle the (even by then) hopelessly mixed bag of “cognatic societies.” Murdock's attempt, though understandable in context, has achieved the oblivion it deserves, and I know of no one since who has attempted a comparable synthesis. Let me start by working with what I consider a more

productive dichotomy, if only slightly, namely, Goode-nough's (1961) distinction between "ego-oriented" and "ancestor-oriented" kinship constructs. By the former, he means what anthropologists usually call "personal kindreds" and, by the latter, what are conventionally labelled "descent groups." I shall have more to say later about ego-oriented constructs. First, I want to focus on those kinship constructs with an "ancestor orientation."

The first thing to note is that the "ancestors" are a motley crew. They are most certainly *not* recalled human beings. Thus, Fortes (1987:76–77), in his summary of African ancestor cults, reminds us that supposedly ancestral beings throughout this area are divested of any personal or idiosyncratic qualities their flesh-and-blood counterparts possessed. Instead, they are depersonalized into categories. One need only read the Bible, written by heirs of such cults, to see that this is so. Abraham does mostly heroic things; he procreates but does not (e.g.) defecate. Jesus does neither. By contrast, in Aboriginal Australian creation myths, the heroes of the Dreaming do both, but it is only the *defecation* that counts, because it, along with other bodily emissions, becomes *externalized* in the form of features of the landscape (Munn 1970). Procreation, by contrast, is purely recreational and often involves beings in relationships, in what Aboriginal Australians call "this time now," wherein anything even hinting at sex is forbidden, for example, mother-in-law/son-in-law (Róheim 1971[1925]: 40). The suggestion, then, is that the beings dubbed "ancestors" in the ethnographic literature are more accurately rendered as "anti-ancestors": they are conceptually opposed to flesh-and-blood people or, more accurately, to the flesh-and-blood part of such people. This being so, they are uniquely qualified to engender what, following Gudeman (1972), I should call "the spiritual person." Often they do this not by anything like descent but rather by instantiation. Thus, Jesus left no fleshly heirs who could procreate and become (really) ancestral to any of his followers; rather, in the Mass, he merges with them. Similarly, Aboriginal Australians, in the course of ritual, imitate the Dreaming beings and become them. This is not "descent" but "anti-descent," a denial of the mortal implications of carnal creation. Even in the classic African "patrilineal" systems, the role of sacrifice and its antithetical relation to carnality have been underappreciated; thus, Jay (1992) has argued that in many such systems, group membership is conceptualized largely in terms of co-participation in ritual killing, rather than agnation *per se*.

But surely (it might be argued) "matrilineal" systems are based solely on real mother–child bonds. Not necessarily. Consider the classic example of the Trobrianders. Malinowski's earliest statements on the alleged "igno-

rance of physiological paternity" in the Trobriand Islands (Malinowski 1916, 1929) make it seem as if the mother creates the fetus, with the assistance of a clan ancestor; the father, for his part, supposedly has only the subsidiary role of giving form to the fetal mass once it has been generated. But these statements were challenged quite early on. Read (1918) made it plain that spirit entry occurs not at conception but at fetal quickening, and, some years later, Rentoul noted a decided concern among Trobriand women "*to expel the male seed*" after intercourse (1931:153, original emphasis). How can we account for Malinowski's error? We now know that Trobrianders, especially Trobriand men, dislike talking about sex for several reasons; among them, according to Jerry Leach, is that such talk offends "the ears of the spirits" (Glass 1986:47). What we have here, then, is another example of a body–spirit opposition, even to the point where spirit entry is held to occur non-vaginally, though the woman's forehead.² Godelier is apparently unaware of these modifications of the initial reports and thus renders Trobriand "conception" ideology in the mistaken terms in which Malinowski (1929:248–250) reported it, missing entirely the subtleties of that ideology.

The other classic case of "ignorance of physical paternity" in Aboriginal Australia³ is strikingly similar. Scheffler (1973:750; 1978:5–13) has shown that, at least for some parts of the continent, spirit entry is held to occur, as in the Trobrianders, at fetal quickening and not at conception, as had been thought. Moreover, at least for the Western Desert, it is known that such entry is supposed to occur non-vaginally, through the woman's stomach, foot or mouth (Shapiro 1996). Finally, there is evidence from several areas that *men*—especially older and ritually prominent men—are disinclined to discuss sexual generation and instead prefer spiritual discourse (Scheffler 1973:750–751). What we have here, too, is a body–spirit distinction, and again Godelier fails to appreciate it (p. 251).

He does note that conception ideologies frequently posit what Sahlins (2013:4) has more recently called a "third party," in addition to the mother and the father, in the generation of the person, and this is an important contribution. Here are his words:

Nowhere ... do a man and woman alone suffice to make a child. What they make together, in proportions that vary from one society to the next and with a diversity of substances (sperm, menstrual blood, fat, breath etc.), is a foetus but never a complete, viable human child. For this, other agents are needed, who are more powerful than humans, ... normally invisible and who add what is lacking for the foetus to become a child. What is lacking is what we customarily call a soul. [p. 299]

But both Sahllins and Godelier tend to see these agents as additive to the parental contribution, whereas they are, in fact, antithetical to it. Further examples of such antithetical factors include naming in many populations (e.g., J. Crocker 1985:63–67; S. Hugh-Jones 2006; Nuttall 1994); male initiation, also widespread (e.g., Jackson 1996; Keesing 1982; Meggitt 1962:281–316); and, of course, godparenthood in many Christian churches.

Something like this formulation may also hold for the “totemic clan” systems of Native North and South America, whose matrilineal or patrilineal character has been canonically emphasized. But Tooker (1971:362), referring to the North American materials, concludes that “clans are ... a type of ritual relationship to a supernatural being” and that “there is often evidence that the members of the clan consider themselves not linked by reason of the relationship through their mother or father, as the case may be, but by reason of their relationship to a clan bundle or fetish and its associated rites” (360). Similarly, Murphy (1979:224) describes Amazonian clans as positing “a kind of descent that incorporates within itself qualities of timelessness.” The best-documented cases are the patrilineal clan populations of the Northwest Amazon, wherein men enact rites, which women may not witness, in which they instantiate “ancestral” beings and generate, that is, *give rebirth to*, boys as men (Goldman 2004:194–215; S. Hugh-Jones 2006; Jackson 1996).

This of course recalls the Aboriginal Australian data, supposedly based on systems of patrilineal clans; indeed, Radcliffe-Brown’s (1952:32–48) classic exposition of localized unilineal corporations takes the Kariëra “horde” as its model case. I shall have more to say shortly about the alleged locality factor. For now, a review of Aboriginal Australian notions of “descent” is in order. Many years ago Elkin (1932a:130; 1932b:331) noted that Aboriginal Australian clan affiliation is primarily based on the locale in which a child’s father “finds” his/her spirit in a dream and that, because of settlement on European-dominated locations and the consequent decline in the importance of local distinctions, the effective principle has become simple patrification. This is an important point. But Elkin, following Radcliffe-Brown, erroneously ascribed an on-the-ground local significance to the clans. I return to this below. The thing to note now is that these two principles hardly exhaust the possibilities of clan affiliation actually encountered in Aboriginal Australia. The most remarkable examples are from the Western Desert. I quote nearly in full from Myers’ account of the numerous principles he found among the Pintupi.

There are numerous reasons for referring to a place as one’s ‘own country.’ If the place is called A, the following possibilities may constitute bases for such a claim:

1. conception at the place A;
2. conception at a place B made by and/or identified with the same Dreaming as A;
3. conception at a place B whose Dreaming is associated mythologically with the Dreaming at A;
4. initiation at A (for a male);
5. birth at A;
6. father conceived at A or conditions 2–5 true for father;
7. mother conceived at A or conditions 2, 3, or 5 true for mother;
8. grandparents ... (including all kin types so classified) conceived at A or conditions 2–5 true;
9. residence around A;
10. death of close relative at or near A.

[Myers 1986:129–130; see also Tonkinson 1978:50–54]

I doubt I would have much difficulty finding more principles of recruitment if I were to consider further ethnographic materials; indeed, Rivière (1993) has done just this for Amazonia. But my point is not to compile an exhaustive enumeration, much less to name the “types,” as if naming constituted theory, a recurrent error in anthropology and one remarkably on display in the work under review. My point, instead, is that labels like patrilineal, matrilineal and bilateral, all of which have by now passed to the general public, are not particularly revealing.

Then there is the consideration that, whatever “descent” or “anti-descent” principles exist in people’s heads, they may have minimal relevance for on-the-ground action. There is surely no better example than the allegedly classic “patrilineal” case provided by Evans-Pritchard’s accounts of Nuer sociality (e.g., Evans-Pritchard 1940, 1951). Several scholars (e.g., Buchler 1963; Gough 1971; Southall 1986), working with Evans-Pritchard’s materials, have shown that the predominant links in Nuer local groups are those among matrilineal and affinal kin, not agnates, whose relationship is often strained over conflicting claims to cattle. To be sure, such groups are dominated by a man or men of the patrilineal said to be associated with the land on which the group subsists, and there are other agnatic symbols, like the spear names called out in ritual (Evans-Pritchard 1956:240–247). But there is no indication of any “tracing of descent,” so that one commentator (Verdon 1982) has argued, correctly to my mind, that the Nuer have no lineages at all.

Godelier shows not the slightest awareness of any of these developments in conceptualizing descent and its importance in human affairs. Instead, as noted, he relies almost entirely on an antediluvian unilineal/cognatic contrast, the stuff of which introductory textbooks are made. This inability to extricate himself from established categories, as I hope to show, is a recurrent and fatal flaw in his book. For now, I would only note that all the textbook “wisdom” about the “tracing of descent” in unilineal systems is largely spurious, applicable mostly to those segmentary lineage systems that are ordered by what Lewis (1965:89) calls “national genealogies.” I find no such “tracing” in many of the “classic” cases, including the Nuer and the Trobrianders. What we have in both instances is selective attention to one (rather than the other) of the parent–child links, not “lineages.” This last expression has become applied indiscriminately to local groups based on unilateral filiation and marriage, to action groups similarly based and to lower-order segments in true segmentary lineage systems and, as such, is probably the most overused term in all of kinship studies (Murphy 1979:221–224).

Alliance and Residence

Godelier’s second and third “components” of human sociality are alliance and residence. The former is based on Lévi-Strauss’s (1969) typology, to which Godelier claims he supplies a refutation. In view of the enormous currency attached to this typology—this too passed to the general public—such an undertaking may seem nothing less than heroic. On the other hand, one might consider the plainer facts that Lévi-Strauss’s initial formulation appeared in 1945 (reprinted as Lévi-Strauss 1963:31–54) and that his major tome on the subject followed four years later. But even if we discount this and consider only the English edition of the latter (Lévi-Strauss 1969; hereafter ESK), we are dealing with a volume that at the time of Godelier’s writing—the original French edition appeared in 2004—was already three decades old. One of anthropology’s problems is a certain scholasticism, an attachment to ideas which have long been shown to be false or, much worse, unfalsifiable and, as already noted, a marked tendency to see the world as an instantiation of typologies rather than something to learn about. The Marxists provide the best examples. Even in recent years, we have had instances of “finding,” in the Third and Fourth Worlds, “cases” wherein, *pace* Engels’ (1972[1884]) ancient musings, the nuclear family is lacking. But Lévi-Strauss on kinship and his followers, including Godelier, constitute a pretty close second. Here are several reasons why Lévi-Strauss’s “alliance theory” is utter nonsense.

There is a very marked tendency in it to assume what one is, supposedly, trying to prove, which of course speaks to its scholastic character. More specifically, almost every marriage anywhere is treated as an “alliance.” When, then, is a marriage not an alliance? It would appear that an alliance is said to exist whenever a relationship is established by a marriage, or antecedent to it, with anyone outside the conjugal pair, usually between one or the other of the pair and his/her partner’s kin, less commonly between these kin themselves (Scheffler 1973:784–786). But calling such an arrangement an alliance adds absolutely nothing to the description and is most certainly not an explanation in any predictive sense (Hempel 1965:308–319). It is a rhetorical device identifying the author with “alliance theory,” “structural-functionalism” or some other scholastic tradition—it has no empirical content whatsoever (Hempel 1965:319–325). Similar remarks apply to “exchange.” We are left with the truism that marriage usually involves relationships beyond that between the married couple, hardly news to anyone who has ever been married.

Further, the nature of the “allied” or “exchanging” units is inconsistently specified. ESK introduces these ideas in connection with exogamous moiety systems (Lévi-Strauss 1969:69–83), but this is entirely inconsistent with other anthropological as well as popular notions of marital alliance, wherein the units are not conceptual categories (like those of an exogamous moiety system) but spatially separated groups of people—canonically, the historically documented and self-conscious marital alliances between European noble houses. In his initial formulation, Lévi-Strauss writes of affinal “relations” between “elementary families,” stating that “it is not the families (isolated terms) which are elementary but the relations between those terms” (1963:51). This is the foundational statement of Lévi-Strauss’ “structuralism.” But I would add that it is also a violation of notions of logical priority and that, taken historically, it is no more than a hen-and-egg question. In practice, Lévi-Strauss and his followers tend to stress exogamous groupings of the “unilineal” sort. This is a highly questionable analytic category, as I have shown. He and those who follow him compound this sloppiness by calling any marriage outside the grouping an “alliance,” without the slightest concern with providing any evidence external to this tautological scheme that a real alliance has occurred.

Actual local groups may intermarry, without the marriage *per se* having any implications for either of these groups as such. A case in point is provided by the Mae Enga of Highland New Guinea. Meggitt (1965:101)

proffers a native adage, which he translates as “we marry the people we fight,” that makes it seem as if local patrilineal group membership is the sole criterion of combative behaviour, but it is clear from his comprehensive analysis that close egocentric kinship is a more salient factor (1965:215; see Shapiro 2013:176 for a more detailed reanalysis of this example). More generally, “alliance theory” renders human sociality primarily or even solely as a matter of intergroup relationship, without any attention to the complexity of the actual principles employed in human affairs (Keesing 1971). “Descent theory” does this too, as Schneider (1965:74–75) and Wagner (1974) have pointed out, and sometimes, as with the Mae Enga, native platitudes help it along. But such platitudes, though of interest, are no substitute for sound ethnographic analysis.

In keeping with its scholastic character, “alliance theory” renders in its own terms almost every marriage rule or preference known to ethnography. Thus, a man who marries the sister of his brother’s wife is said to be “strengthening” “the alliance,” no independent evidence for strengthening (or alliance in the first place) being thought necessary. Or when a man may not marry the sister of his brother’s wife, the “alliances” of his “group” are said to be “scattered,” with no independent evidence for either scattering or alliance. Leviritic marriage is held to be “strengthening” in this way, without any attention to the numerous cases in which its basis is egocentric kin claims and not group membership (Scheffler 1973:764–765). Polygyny likewise “strengthens” or (if non-sororal) “scatters” alliances, presumably having nothing to do with men’s desire for sexual diversity and numerous heirs. Most prestigious of all, cross-cousin marriage, more particularly in its bilateral form, is held to be the “elementary structure” of all kinship, “creating” or “strengthening” an “alliance.”

This last point leads to some highly pertinent ethnographic data, for which “alliance theory,” to the extent to which it can be considered an empirical theory, is hopelessly inadequate. As long ago as 1955, Fred Eggan, drawing on the research of others who worked directly with Northern Algonquian hunters/trappers in the Eastern Canadian Subarctic, noted that “what we have here is a relatively new type of social structure for [Aboriginal] North America: a *bilateral band held together by cross-cousin marriage*” (1955:521). The English translation of ESK was a decade and a half away, and there is no indication that Eggan read ESK in the original French. Hence, it is significant that he makes no mention of “alliance.” In fact, it was already clear from a considerable ethnographic literature that cross-cousin marriage in these populations has absolutely nothing to

do with intergroup relations but instead is a rule or preference *sui generis* (e.g., Hallowell 1937; Landes 1937; Speck 1918). In kin classification, the parallel/cross system said by Lévi-Strauss to be the simplest “structure” of “alliance” (1969:98–99) is there, but there is not a shred of data indicating that it is conceptualized by the natives as such or that intergroup relations are involved; on the contrary, Eggan says expressly that “there is no evidence that particular extended families systematically intermarried” (1955:524).

The same pattern occurs widely in the other half of Aboriginal America. Lévi-Strauss’ own findings among the Nambikwara of Central Brazil, perceptively rendered as “the decisive moment” in the development of alliance theory (Coelho de Souza 2009:85), are well known; he witnessed a group of Nambikwara intermarrying with congeners who had formerly been strangers by extending the “cross” kinship categories to them (Lévi-Strauss 1943). But this tactic, though it may be employed elsewhere in Amazonia, is not especially frequent; more common are populations that, like the Northern Algonquians, are locally endogamous (e.g., Kensinger 1995:109; Kaplan 1975:73; Viveiros de Castro 1992:162). To be sure, in the northwest of Amazonia we find exogamous patrilan communities with much the same cross/parallel distinction in kin classification (e.g., Arhem 1981; Chernela 1993; C. Hugh-Jones 1979); here, possibly, an “alliance” interpretation may be in order. But Oberg (1955) has suggested that such local clanship in the region is a historically late phenomenon stemming from population expansion. Goldschmidt (1948) theorized as much for parts of Aboriginal North America, where the simple cross/parallel distinction is often supplemented by Crow/Omaha terminologies and the prohibition of all cousin marriage, and Callender (1962) provides an excellent analysis of the matter for farming congeners of the Northern Algonquians. So it may well be that *endogamous* communities with cross-cousin marriage are a very old characteristic of Aboriginal American sociality; that is, “elementary structures” were replaced by “complex structures,” just as theorized by Lévi-Strauss (1969:459–477).

If so, this is no vindication of his scheme—and *not* just because the “elementary structures” were realized in endogamous communities. *It is a historical statement of a documentable process.* The gravamen of ESK is an exercise in what has been called “origin-and-essence” mythology (Shapiro 1990), comparable not to anything that actually happened, however long ago, but to the “origin” myths found in our ethnographies, in which origin imagery is employed to express construed “essences.” So, for example, Essential Man in the Judaeo-

Christian tradition is Without Sin; in Marxism he is a Primitive Communist; in ESK he is an Advocate and Practitioner of Cross-Cousin Marriage. But this is metaphysics, not history, even if most of the anthropology we dub “evolutionary” partakes of it. There is no logical reason why Crow/Omaha systems could not precede cross/parallel ones.

These remarks apply as well to Aboriginal Australia, allegedly the *locus classicus* of “elementary structures.” One can create a Guttman Scale suggesting that Kariara ... Murngin ... Gidjingali ... Walbiri ... Kimberleys ... indicates a regular sequence in the historical development of sociality on the continent, which I did quite some time ago (Shapiro 1971). Be this as it may, and despite the fact that, in the wake of ESK, one could fill several fat volumes with published articles attempting to show that Aboriginal Australian “local groups” are related by various forms of “prescriptive alliance”—the term is of course Needham’s (e.g., 1962)—alliance theory has virtually no place in our appreciation of Aboriginal sociality on this continent. There are two reasons for this: (1) the “local groups” are not really local groups but clans, often, as noted above, having something to do with patrilineage; and (2), and this is worth stressing, *there is not a shred of evidence that these clans act corporately in the politics of marriage.*

I need to expand on these remarks. The idea that actual local groups among Aboriginal Australian people consist of male agnates and their in-married wives was put forward by Radcliffe-Brown (1931:4). For many years this statement, based solely on expressions of commitment to “their” countries by Aboriginal Australian men, was taken as authoritative. Then, in the 1960s, first Meggitt (1962:70–71) and then Hiatt (1965:18–19) reported multi-clan communities for the Walbiri and the Gidjingali, respectively. They did not, however, discover the principles by which actual groups organized locally. This was done by Peterson (1970) and myself (Shapiro 1973), working in different parts of north-eastern Arnhem Land. Peterson presented quantitative data showing that the local group he studied was based not on the father–son tie, as Radcliffe-Brown’s model presupposed, but on the wife’s parents–daughter’s husband tie; and he theorized, using the “developmental cycle” approach to local grouping pioneered by Fortes (1958), that when a man is relatively young he lives with his parents-in-law on his wife’s father’s estate and then, when older, with his parents-in-law gone, he moves with his wife to his own estate and the cycle is repeated. But he presented no evidence for this latter move. In my own study, based on four local groups living away from Europeans, as well as on native settlement at a mission

station, I was able to confirm the first part of Peterson’s model, that is, that the key tie between males in a locality is father-in-law–son-in-law, but I found no evidence for the cycle Peterson proposed. On the contrary, the locale of residence was thought irrelevant; instead, the key motives were said to be the right of a man’s affines to bride-service and his obligation to provide it. Moreover, I attempted to discern whether this pattern antedated European contact by asking older men, who were born before missions were established in the area, where their fathers “found” their spirits (see above). Approximately half were “found” on estates to which neither they nor their fathers had claim. Since Peterson’s and my analyses have appeared, a very considerable amount of research in the Western Desert, some of which I have already noted, indicates multiple bases for estate claims and thus, presumably, nothing even close to Radcliffe-Brown’s model.

So much for residence. It is still possible, *pace* Lévi-Strauss, that somehow scattered agnates come together to negotiate the marriages of their daughters. This possibility was demolished by Hiatt’s seminal monograph on north-central Arnhem Land, wherein he puts it starkly: “Patrilineal groups were not units in wife-exchange systems of the kind implied by Lévi-Strauss’s theory on kinship and marriage” (1965:xiv).⁴ Rather, a Gidjingali girl was bestowed primarily by egocentric kin outside her patriclan, especially by her mother and mother’s brothers. The latter, moreover, were entitled to reciprocity, specifically, to the sister’s daughter of their own sister’s daughter’s husband. In other words, there is an exchange of females here but no notion of interclan “alliance”: in Hiatt’s words, “the patrilineal group affiliations of the potential brides were irrelevant” (1965:38). Under certain conditions, a girl’s father could bestow her, but when he did, he acted on the basis of his egocentric kin relationship to his daughter and not as a member of her patriclan (Hiatt 1967:474; see also Hamilton 1970). Hiatt continued his assault face-to-face with Lévi-Strauss at the first Man the Hunter Conference (Hiatt 1968). One might assume that the latter would have been impressed by the “niece-exchange” Hiatt reported, but he was not. Here is part of his retort: “If Hiatt’s recent observation of what is left of a collapsing Australian tribe should carry more weight than the bulk of the older literature, then let us ban the books” (Lévi-Strauss 1968:210–211). In fact, the “older literature” (reviewed in Hiatt 1967), written when, presumably, there was less “collapse,” contains numerous examples of “niece-exchange.” Two things should be noted about Lévi-Strauss’ pitiful response to Hiatt: (1) his primitivism, that is, his attempt to find a Timeless

Reality underneath the “corrupt” data; and (2) his marked tendency to play heads-I-win-tails-you-lose with his adversaries, to proffer what philosophers call “closed systems of thought,” immune to negative evidence. Both, by my lights, disqualify him from being taken seriously as an empirical scholar, a conclusion I am hardly the first to reach.

My own research, farther east in Arnhem Land, supports Hiatt’s conclusions in nearly every particular, down to “niece-exchange,” though here not as wives but as mothers-in-law. Such exchanges, though recognized as a possibility, occur only rarely, for reasons spelled out in Shapiro (1981:99). Although a man here may marry his MBD but not his FZD, this has nothing to do with the “generalized exchange” systems of Southeast Asia; I made this point in a pair of articles published four decades ago (e.g., Shapiro 1968, 1971) and in *Miwuyt Marriage* (Shapiro 1981). But in the work under review, Godelier (p. 510), following Lévi-Strauss (1969:168–196) again, renders Murngin marriage as “asymmetric alliance.”

So Aboriginal Australian marriage is not about “alliances” between “local groups.” *It is an entirely egocentric affair*: the parties involved are involved because of their egocentric relationship to the girl and the egocentric relationship between the would-be husband and his would-be wife and her egocentrically close kin. The key difference among particular systems, as I have suggested elsewhere (Shapiro 1979:57–58), is between kindred endogamy, such as we find along the Arnhem Land littoral, and kindred exogamy, which is much more common. And I rather suspect, with Scheffler (1973:764–765), that this is the case very widely elsewhere.⁵

Which brings me back to Godelier. His “refutation” of Lévi-Strauss, so far as I can discern, consists of two points which seem eminently supportable. Thus, he cites examples in which it is men, not women, who are exchanged, concluding that “the formula: kinship is based on the exchange of women between and by men does not have the universal validity Lévi-Strauss ... attributed to it” (p. 126). This is fine—although the small number of cases he adduced could have been supplemented by the findings, noted above, of Hiatt and others on Aboriginal Australian women bestowing other women, as well as a much larger corpus of findings in which women, in conjunction with their husbands, give their daughters in marriage. But Godelier remains “allied,” if the pun be pardoned, to exchange as crucial to kinship, which, I shall show shortly, is utterly mistaken. He also notes that some forms of marriage “may not imply any form of exchange” (p. 128). This is consistent with part of my argument above, but Godelier regards it as

an aside; his sole example is “marriage with a captive” (p. 128). Otherwise, the “alliance” part of this chapter is Lévi-Strauss *redux*.

So, again, Godelier shows himself “captive” to established formulas, without the slightest regard for their empirical soundness. This is repeated in the much smaller “residence” part of the chapter, which presents the typology developed by Murdock (1949)—matrilocal, patrilocal and so on—for comparative purposes. But attention needs also to be paid to Goodenough’s warning that

it is a procedural fallacy to use these concepts as a basis for classifying the residence choices of individual members of a society. They do not choose on the basis of criteria which are outside their culture, *which exist only in the heads of anthropologists*. They choose on the basis of criteria ... which may be quite different ... from those used by the anthropologist in classifying their culture. [Goodenough 1956:29, emphasis added]

The significance of this quote for subsequent ethnographic theory is impossible to overstate: it, along with Goodenough’s (1951) monograph on the Micronesian island of Truk, is the prototypical statement of a quest for replicable ethnography, for what we now call “the natives’ point of view,” pursued primarily by American scholars in subsequent decades and now morphed into a cognitive anthropology (see D’Andrade 1995 for a relatively recent statement). But Godelier seems to be utterly unaware of these developments.

Kinship Terminologies

I place no quotation marks around this designation for Godelier’s fifth “component,” because here, at least, he calls them what they are. They are egocentric classifications *based on locally posited genealogical connection*—on ethno-embryologies, as I would have them called. They are *not*—not basically, anyway—terminologies expressive of alliance relationships and, *pace* Schneider (1984) and Sahlins (2013), they are *not* terminologies whose non-procreative referents have the same semantic status as their procreative ones. The corpus of data supporting these conclusions is nothing less than monumental; indeed, *this is cultural anthropology’s most secure finding*, and only the thickest of intellectual blinders can make it seem less than crystal clear. Here is the classic statement of the matter, now more than three-quarters of a century old:

It is important to remember, as bearing upon the status of the family, that in many primitive tribes the terms used for the immediate members of the family

are either distinguished from the same terms in their extended uses by the addition of some particle, or terms corresponding to 'own' are used ... Family is family, whatever the system of relationship. [Goldenweiser 1937:301]

The Baruya of Highland New Guinea, studied firsthand by Godelier, are no exception. Although he provides no comprehensive analysis of native kin classification, there are pertinent tidbits throughout his corpus. Thus, he notes a special term for "a male friend" and one for "a female friend," telling us also that these terms can replace the usual "brother" and "sister" terms, respectively (Godelier 1999:144). And he adds that a "male friend is (like) a brother, a female friend (like) a sister." I presume from this that such likening is expressly made by the Baruya. If so, one's brother and sister are what semanticists call the foci of the classes signified by the labels "male friend" and "female friend" respectively, and these two kin types provide models for the extension of "sibling" significance, much as in English I might say of a close male friend, "He's like a brother to me!" Elsewhere Godelier (2011:329) tells us that "the mother's sisters are regarded as other mothers," though it is not entirely clear how this "otherness" is expressed in the Baruya language. My guess is that there is indeed a separate term translatable as "other" employed here; certainly this is very widely the case elsewhere (e.g., Bromley 1980; W. Crocker 2002; Handy and Pukui 1972[1958]:65). If I am correct, then the mother is the focus of her kin class for the Baruya. In any case, we know quite definitely that the mother's brother is singled out from others of his kin class by a lexeme which Godelier (1999) translates as "of the breast," suggestive of his being a "male mother," a notion that, as we know from Radcliffe-Brown (1952:15–31) and others, has wide ethnographic occurrence. Note that it has never been reported that the mother herself is a "female mother," which suggests that everywhere the focal referents of the "mother" class are taken to be female. Godelier (1999) seems also to indicate that there is a Baruya lexeme translatable as "classificatory," though this, too, is not entirely clear. In any case, comparable lexemes have been widely reported elsewhere (e.g., Bromley 1980; Feinberg 2004:81; Shapiro 1981:38–41). Godelier is more explicit when it comes to male initiation, where he points out that "every young initiate has two sponsors of different ages, chosen ... from his mother's lineage; one of these is said to be 'like his mother,' and the other, 'like his sister'" (2011:333; see also Godelier 1986:39, 154). He absorbs semen, likened to mother's milk, from both men (2011:333). This, then,

is a ritual complex of the sort that Hiatt (1971) calls "pseudo-procreative," which of course occurs widely—not only in New Guinea but in Amazonia, Aboriginal Australia and elsewhere as well (e.g., Gregor and Tuzin 2001; Shapiro and Linke 1996). Godelier, referring to the two sponsors, states it quite succinctly: "The maternal functions are transferred to the sphere of ... male initiation and transposed into a masculine mode" (2011:333). He also tells us that, through such initiation, the boy is "born again" (1986:52), though, once more, it is not quite clear whether the idiom is his or that of the Baruya.

All this may seem arcane and of little significance for anthropological theory. It may be the former, but it is most certainly not the latter. For what it—along with, I repeat, an enormous amount of comparable data in the ethnographic record—demonstrates beyond a shadow of a doubt is that what anthropologists have long called "primary" kin relationships are indeed primary semantically and that kinship is indeed founded on the nuclear family, just as Malinowski (1962[1930]:47), Murdock (1949:1–22), Lounsbury (1965) and many others have argued. Marxists will of course oppose this conclusion, as will "alliance theorists," but they will be able to do so only on scholastic grounds. Schneider's admirers and those of Sahlins will call attention to the numerous "performative" criteria for establishing kinship, utterly oblivious to the demonstrable fact that almost every one of these is modelled on ethno-embryological notions. To repeat: support for this conclusion is there in major as well as minor ethnographic treatises, and it has been there for decades.

Godelier follows Lévi-Strauss in insisting that "the family ... cannot be the ultimate basis of human society" (p. 217). But his reasoning is different: he says that this is so because "it is never simply kinship relations that are stamped on to bodies and consciousness. For, at the same time, bodies and consciousness are imprinted with the political and religious power relations that prevail in the society" (p. 217). Sahlins (2013) shares this Durkheimian position. But then who does not? But I would also maintain, if I had anyone to contest, that bodies and consciousness are also influenced by the air people breathe and the food they eat, neither of which has anything to do with semantic analysis.

So what does Godelier have to say about the extensionist position and the light it sheds on human kinship? Almost nothing. He mentions Lounsbury and Scheffler several times in passing, but his treatment of their ideas (p. 167) is far too truncated. He seems entirely unfamiliar with the sort of semantic analyses just demonstrated, even when it applies, as I have shown, to his own field

materials. And he pays no attention at all to more recent developments in kinship semantics (e.g., Keen 1985; Kronenfeld 1996:147-170; Wierzbicka 1992:329-370).

Can it get even worse? Yes, it can, and it does. But before I show this, I need to attend—briefly—to Godelier's sixth "component," which has to do with ideologies of procreation. As I have already noted, he introduces the important idea of a "third party" in such ideologies, but he fails to appreciate its antithetical relationship to the parental contribution. Hence, as also noted, he misinterprets the Trobriand and Aboriginal Australian materials.

"Incest"

Godelier compares incest prohibitions with other norms about proper and improper sex as locally construed, such as necrophilia, having sex in a sacred place and so on. This seems reasonable enough. But then he denies that sexual aversion can be unconscious:

Can an anthropologist interpret these conscious representations and these explicit rules of conduct as a surface that ... hides different rules which determine ... individuals' conduct without their being aware? This is probably true in the case of ... language, but it does not apply to ... norms or the explicit rules that govern ... kinship relations ... Does an anthropologist have the right ... to introduce totally alien meanings into a culture and to claim that these meanings really exist in the culture but in forms of which those who experience and obey them are unaware? We do not think so. [p. 347]

This strikes me as incredible, coming as it does from a disciple of Lévi-Strauss, on whom a vast literature exists that is critical of his cavalier positing of "forms of which those who experience and obey them are unaware." Anyway, when it comes to incest, Godelier is quite wrong. Over a century ago Westermarck suggested that "there is an ... aversion to marriage between persons living very closely together from early youth" (1903:544). The suggestion was ignored for decades, during which time the prevailing "explanation" for incest rules was the "final cause" one adduced by Lévi-Strauss (1963[1945]:51), for whom they are part of a "structure" that also contains rules of alliance. Then, in his research on Israeli collective farming settlements (*kibbutzim*), Spiro (1975[1958]:347-349) noted that in the early days of the *kibbutz* movement, children who had been raised together in communal nurseries never married—despite there being no external prohibition on marriage other than close kinship. This finding would seem to be confirmed by Shepherd (1971), who stressed native state-

ments of repugnance toward such marriage possibilities: "We sat on the same pottie together," one of his informants observed. Around the same time, Arthur Wolf (1966, 1968, 1970; Wolf and Huang 1980) noted something remarkably similar in his research in rural Taiwan. In traditional Chinese marriage, husband and wife meet for the first time at the wedding ceremony, provided the groom's people could afford the brideprice. If they could not, an alternative was available. The girl could be sent to the boy's home as early as one year of age, to be raised by his parents. Then, around age 16 to 18, the couple married. Wolf found (1) that such "second-class" marriages produced significantly fewer children than "first-class" ones; (2) that they were sometimes resisted altogether; (3) that divorce was significantly more frequent than in "first-class" marriages; (4) that men who married second-class, though usually poorer, nonetheless frequented prostitutes more often than their more affluent compatriots; and (5) that women married second-class were more likely to pursue adulterous affairs than more affluent women.

Wolf has continued his inquiries over the years, gradually refining them so that we now know more about such factors as the age range for which such sexual aversion is most effective, whether it is more severe for the younger or the older partner, and so on (Wolf 1995; Wolf and Durham 2004). Reading him is a lesson in scientific method as he tests hypothesis after hypothesis against his data, considers alternative explanations for his findings adduced by other scholars, and brings to bear on his Westermarck-derived theory the research of others (Wolf 1993). All this may be very favourably compared with the ponderous scholastic style of Lévi-Strauss, whose hostility to contrary findings and circularity of theory have already been noted, and, to a somewhat lesser degree, that of Godelier as well. Anyway, we now know from a substantial body of studies (see also Gardner 2009; Lieberman 2009; McCabe 1983) that Westermarck was right. Even some of the apparent exceptions, emphasized by Godelier (pp. 336-389) have turned out to be insufficiently examined (Scheidel 1996, 2004). This body of evidence points to a secured anthropological finding of great generality and popular and theoretical interest. What does Godelier have to say about it? Almost nothing: Westermarck rates a passing citation, but none of the recent research by Wolf or anyone else is even mentioned.

The entailed idea, I would add, that human behaviour is in accord with unconscious structures, which Godelier denies outside language, began in fact to be demonstrated by linguists and cognitive psychologists around the time the original French edition of ESK

appeared (e.g., Chomsky 1957; Lashley 1951; Miller et al. 1960). But this research is, so to say, off the radar of most anthropologists, including the so-called structuralists.

Conclusion

This is key. It is not that Godelier's book makes no good points: it does. I have already mentioned his idea that a "third party" is always posited in the creation of a child. Moreover, the chapter on kin classification, though based almost entirely on Murdock's (1949) typology, shows that the types so recognized have regular historical relationships with one another. There is a great deal of erudition here and a certain expertise. But it is an expertise on what certain anthropologists have said about human kinship, not an expertise on human kinship *per se*. Its treatment of adoption, for example, is inadequate, and it has nothing at all to say about attachment theory, kin recognition in animals (including humans), what evolutionary anthropologists have called alloparenting, the use of kinship metaphor in expressions of nationalism, the Western communitarian tradition and other topics. It is not clear whether Godelier intends here an introduction to human kinship, but like (other) people who proffer such introductions, he is mostly unable (as one says these days) to think outside the box: for him kinship consists mostly of descent groups, alliance theory and kinship terminologies—all rendered according to typologies produced by established "authorities," none of whom he seriously questions. There is very little left to discover.

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Notes

- 1 Godelier also recognizes the supposedly "parallel descent" of the Apinaye of Central Brazil first noted by Nimuendajú (1939) and the "ropes" of the Mundugumor of New Guinea reported by Mead (1963:176). But even if we accept these reports at face value, these forms of "descent" have only rare occurrence ethnographically. For updates see Da Matta (1982:84–85) and McDowell (1977).
- 2 See the extra-Biblical notion that the Virgin Mary was impregnated through the ear.
- 3 Rendering all of Aboriginal Australia as a single ethnographic "case" is, admittedly, incautious—I do it here only to highlight the stark parallels with the Trobriands. The

available evidence does not permit my analysis to be generalized to the entire continent.

- 4 Whether Aboriginal clans, even when membership is based solely on patrilineage, should be called patrilineal is questionable, for reasons indicated above. But this need not concern us here.
- 5 Mention should be made here of Yalman's (1962) conclusion that the so-called Dravidian systems of South India and Sri Lanka in fact regulate marriage within endogamous kindreds rather than between "descent groups," which may or may not exist.

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Book Reviews / Comptes rendus

Frohlick, Susan, *Sexuality, Women, and Tourism: Cross-Border Desires through Contemporary Travel*, London: Routledge, 2013, 222 pages.

*Reviewer: Megan Rivers-Moore
Carleton University*

Tourism, by definition, is fraught with complicated relationships: between tourists and the toured, between more and less successful regions, between nation-states competing for tourism dollars. The search for newness and difference, always defined by a variety of kinds of inequalities, has frequently included travellers who seek out sex and intimacy in the context of “exotic” and usually racialized settings. Susan Frohlick’s new book marks a rich contribution to a growing body of literature on contemporary transnational sexuality. *Sexuality, Women, and Tourism* is a beautifully written ethnography of the transnational sexual and intimate encounters that take place in Puerto Viejo, Costa Rica, a small town on the country’s southern Caribbean coast that is thoroughly imbricated in global tourism markets and processes. Frohlick offers a thoughtful and nuanced exploration of the experiences of women tourists (both short and long term, as well as some documented and undocumented residents). The book asks us to ponder relevant and important questions about heterosexuality, challenging the ways in which it is so often left unmarked, while simultaneously directing us to think about how it is enacted differently through travel.

One of the many strengths of *Sexuality, Women, and Tourism* is that it focuses not just on the relationships between tourists and local men (which are fascinating) but also on the tourist women’s own sexual subjectivities and the role that international travel plays in shaping specific kinds of gendered heterosexualities. While we may assume that we already know that sexuality is frequently shaped by a search for an exotic other, Frohlick’s powerful research demonstrates the importance of paying close attention to the specificities of place and time. The way exoticism plays out in Puerto Viejo, the contradictory and confusing understandings about race and place that are demonstrated through interview vignettes, aptly illustrates the significant impact that ethnographic inquiry can have. Indeed, Frohlick beautifully captures the particular complexities of Limón province. Defined by tangled transnational flows for much of its history (including various waves of migra-

tion, as well as a shifting dependence from bananas to tourism), Limón is still neglected by the Costa Rican state, treated as other, a space of conveniently colourful multiculturalism but also of violence, poverty and social disorder. Frohlick’s detailed descriptions of the town offer a vivid juxtaposition of surf shops, yoga schools and vegan restaurants with the lack of a high school and even a basic medical clinic. Frohlick’s inclusion of excerpts from her field notes and personal reflections on her own time in Puerto Viejo is very welcome. This is mainly because Frohlick is such a sensitive anthropologist, offering cogent critiques of her research participants’ comments while at the same time remaining largely sympathetic to their attempts to make sense of their lives in Puerto Viejo.

Definitions of what exactly we are talking about when we talk about transnational sexuality, particularly sexuality that has a commercial element, can get decidedly murky. With chapters organized around key themes (desire, sexuality, embodiment, intimacy, difference and erotics), Frohlick does a very commendable job of getting to the heart of complex questions about who is a tourist, who is a local and how one can understand the connections between sex, intimacy, money and tourism. She complicates overly simplistic narratives (still surprisingly common) about sex tourists (or *romance tourists*, the term more often used for women), offering a vision of fascinating, contradictory and infuriating subjects involved in negotiating what are often difficult and confusing relationships. Despite the ongoing (and, I would argue, quite tiresome) debates about whether women can also be sex tourists, if anything, I was struck by just how much the narratives of the women Frohlick met resonate with the interviews with male sex tourists I have read and conducted in my own research. The convoluted interpretations of their experiences, the contradictory analyses, the mixture of worldly suspicion and naive trust, the regular references to exoticized, racialized stereotypes were all there among the tourist women. Reading Frohlick’s book reminded me again just how false the gender binary so often set up when thinking about men and women who travel and engage in transnational sex and intimacy remains. That said, Frohlick also cautions against any simple analysis of these relationships as straightforward sex work, instead arguing that they must be understood in the specific context in which they take place, in all their conceptual complexity.

The tourists’ narratives make for fascinating reading: from arrival stories that emphasize chance and serendipity

to attempts to make sense of differing expectations around intimacy, Frohlick expertly combines rich ethnographic description with her own interpretation of the stories she is told. Frohlick powerfully demonstrates that despite many women's narratives of spontaneity, their experiences are deeply social and cultural and must be understood in relation to a broader set of forces, which include place and context. Frohlick's analysis of these relationships as socially and historically shaped is especially convincing.

Frohlick's book is both theoretically sharp and a pleasure to read. This excellent contribution of our understanding of transnational sexuality and intimacy should be read (and taught) widely by anthropologists, sociologists, geographers and those interested in tourism studies, gender studies and Latin American and Caribbean studies.

Fosshagen, Kjetil, ed., *Arab Spring: Uprisings, Powers, Interventions*. Critical Interventions: A Forum for Social Analysis, vol. 14, Oxford-New York: Berghahn Books 2014, 115 p.

*Reviewer: Nayrouz Abu Hatoum
York University*

How can anthropologists write about a present that is constantly under construction? How can anthropology account for events in the *now* that are trajectories of past events, while also accounting for the past colonialism, decolonization, wars or partitions? What do anthropologists offer that could possibly be different from other social scientists? My answer is *definitely* a lot. Anthropological writing could engage with the ways people make and unmake sense of their lives or the way they tell their national story, while seeing their states and communities unfolding in front of their eyes or while witnessing the collective force of braveries emerging after years of suppression.

Arab Spring: Uprisings, Powers, Interventions (2014), volume 14, edited by anthropologist Kjetil Fosshagen of the series Critical Interventions: A Forum for Social Analysis, barely succeeds at bringing a new perspective on the revolutions in the Arab world. Since most contributors in this book are anthropologists, elaborate anthropological perspectives and explorations were anticipated, yet missed. However, what the book does succeed at is offering opinion essays, directed at both academic and non-academic audiences, and provoking possible questions for future anthropological research. Expecting immediate results in the Arab world, the essays in the book, as a whole, leave the reader with a slightly negative or suspicious feeling as to the ability of people in the Arab world to bring into being significant socio-political transformations. Although it is true that major structural powers were not radically overthrown, the revolutions in the Arab world have torn down the walls of fear in people's hearts and minds and made it possible to imagine a different future.

Fosshagen suggests a macro political-economy framework for reading the recent transformations in the Middle East and North Africa. He argues in the Introduction that despite the powerful and widespread protests, the "Arab uprisings," like

1848 Europe's Spring of Nations, did not produce radical political or social changes. The Arab uprisings, he claims, at best have pushed the governments to expand individual political rights, mostly among the middle classes. Fosshagen poses two crucial questions that one should keep in mind in relation to the Arab Spring. First, can these revolutions be considered "social revolutions in the historical and political sense, in that they promised and introduced a radically new social order?"; and, second, is there "a structure of social forces underneath the apparent chaos of the Arab Spring uprisings and their aftermath?" (p. 1).

Fosshagen attributes the heaviest weight behind the spark of the revolutions to the neoliberal economic policies that were introduced in the early 1980s, which included land reforms and the privatization of health care, education and industries. Reading Fosshagen's Introduction one learns that the Arab revolutions were mainly caused by economic and political frustrations. One also gets a strong impression that these revolutions failed or barely succeeded, as they were hijacked by (international) liberal forces.

While it is true that radical transformations did not occur over the short time of the past four years, mobilizing and protesting against state forces gave rise to the formation of other social radical spaces of activists who succeeded in addressing a multiplicity of issues that were crucial in imagining change in the midst of all the uncertainties. The best example is the powerful women's mobilization in Cairo against (military) sexual violence toward women (Assaad 2014).

Fosshagen's Introduction fails to locate the Arab world's revolutions in a wider historical context in the region. Such dehistoricization ignores the effects of almost 150 years of European direct and indirect colonization of the Arab world. A book on the current Arab revolutions should, instead of looking at Europe's 1848 Spring of Nations as a historical point of reference, compare today's events to previous historical revolutions in the region, such as decolonization revolts in the first half of the 20th century.

The first two contributions, by Paola Abenante, Pnina Werbner, Martin Webb and Kathryn Spellman-Poots, shed light on the marginalization within academic research of visual and performative art produced during the revolutions. The other four contributions explore the events in the region through a macro political and economic framework.

Abenante's piece focuses on Egypt's Tahrir Square reclamation and the politicization of the public space, specifically through the eyes and work of one street artist. Despite wide critique of the western singling out of the Tahrir Square site as the voice of the Egyptian revolution, which Abenante acknowledges, she nonetheless chose to look at Egypt's revolution through this same prominent urban square. Through the work of one artist, Abenante brings out a prevalent sentiment of Egypt's protestors, particularly that which reflects protestors' ambivalent relation to the state's military.

The chapter by Pnina Werbner, Martin Webb and Kathryn Spellman-Poots is an invitation for anthropologists to further research performativity and visual art in current global protests against neoliberal reforms. The authors suggest a comparative analysis of global protests drawing on the ways each national protest informs the other. What is missing from this invitation is a warning against falling into a comparative research that dehistoricizes local processes: Spain's and Tunisia's

protests may share similar characteristics, but they grew from radically distinct contexts and histories of colonial relations.

Michael Humphrey's piece provides an analysis of the international political forces at play in the latest transformations carried out by protests in the Arab world. Humphrey focuses on the uses of emergency law both at the hands of Arab dictatorships, claiming to protect the national security, and at the hands of U.S. and western powers, as a way of maintaining their war on terror overseas. His article exposes the extent of U.S. interest in oil access in the region, as well as the U.S. vision of creating a New Middle East that would enjoy normalized relations with the West and Israel. While it is important to map out the political forces intervening in the current Arab world revolutions, the author ignores the micro processes and dynamics, as well as local mobilization that is pushing forward an anti-imperialist and anti-capitalist agenda, specifically in the case of Syria and Libya.

Sobhi Samour's essay lays out the promises and limitations of the economic protests in the West Bank against the Palestinian Authority's policies and the economic failures of the Paris Accords. The existence of Israel as a strong military power and the U.S.-backed governments in the Arab world, he argues, were not the only reason for the retreat of an emancipatory vision in the region. The failure to link political struggles with social emancipation was a crucial factor in the years of weak liberation streams in the region. An observation he makes is that in the midst of the revolutions in the region, a dominant sense of frustration with the political and economic conditions, post Oslo's catastrophic effects on Palestinian independence, took over in the Palestinian Occupied Territories. This frustration resulted in protestors taking over the streets for two weeks in September 2012 before it soon fizzled out. Samour's strongest argument is his connection of the past ten years of efforts among Palestinians to mobilize the international community in boycott, divestment and sanctions campaigns against Israel with the local 2012 protests against the Palestinian Authority's neoliberal agenda and normalization with Israel. The two fronts are equally necessary.

Declaring Bahraini revolution a failure, Thomas Fibiger titles his piece "Stability or Democracy? The Failed Uprising in Bahrain and the Battle for the International Agenda." This failure he attributes to the lack of support from the international community. The reason for crushing the protests, he claims, is the U.S.- and Saudi-backed regime in Bahrain. The majority of the population of Bahrain are Shi'a Muslims, while the governance is Sunni, which allows the Saudi and Bahraini governments, he writes, to claim that the desired reforms in Bahrain have an Iranian-Shi'a agenda. Bahraini protestors are proud Bahraini Arabs, Fibiger asserts, who have no affiliation with Iranian nationalism.

What I found frustrating in Fibiger's piece was the urgency to argue that the Bahraini revolution has failed and the expectation of radical changes in a short period. While people in Bahrain have not given up, the author provides us with a rushed judgment indicating otherwise. Instead, I suggest attention to the following questions to get at stronger insights: What are the transformations that the Bahraini revolution produced? How have Bahrainis shifted their relations to urban and public spaces/landscapes during and after the revolution? How did women's participation in the Bahraini revolution push social and political reforms in their relation to the state?

The book ends with Fosshagen's chapter criticizing debates in the U.S. administration and among Arab liberal circles that offer the Turkish state as an ideal model for the new Arab states in transition. Fosshagen's piece exposes U.S. discursive efforts to conflate neoliberal economic policies with liberal democratic change in the service of implementing the U.S. vision of the New Middle East. Turkey's friendly relations with the United States along with its Islamic neoliberal economic and social reforms promote a unique form of democracy in the region that could appeal to imperial forces.

Despite the economic growth that Turkey has experienced with Recep Tayyip Erdoğan's government, the Gezi Park demonstration, Fosshagen claims, attempted to expose foreseen economic catastrophes. Agreeing with Fosshagen, I suggest expanding the anthropological curiosity and asking the following: What forms of nationalism are being challenged through the Gezi Park movement that could offer a possible future vision? How is the Turkish state's national exclusionism playing a role in the Kurdish question in the region?

The importance of exploring these questions emerges from empirical accounts of a wide range of protests that took place all over Turkey, including the Kurdish areas. In addition to protecting public spaces in urban settings, demonstrations in Turkey attracted radical left, feminist and queer movements demanding significant social transformation (Örs 2014). What Fosshagen misses, therefore, is Kurdish, queer or feminist voiced critiques that offer elaborate testimonies on why the Turkish state is a failed model for Turkey, let alone the Arab world at large.

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Dave, Naisargi, *Queer Activism in India: A Story in the Anthropology of Ethics*, Durham: Duke University Press, 2012, 272 pages.

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Naisargi Dave's *Queer Activism in India* explores the shifting terrain of queer politics in India and the emergence of new forms of identification, belonging and loving in the wake of global campaigns for LGBT rights. Clearly written, with vivid and vibrant descriptions of intimacy between women involved in feminist and lesbian activism, the text grapples with the entanglements of affect and political engagement in a cultural context where challenges to normative configurations of gender

and sexuality have increasingly come to be articulated and absorbed within judicial, governmental and quasi-governmental frameworks of legibility. Dave offers a nuanced and delicate analysis of the workings of liberalism and the efforts of lesbian and feminist activists who simultaneously fight against homophobia and sexism, while competing for limited funds within the sphere of NGO and grassroots politics. Central to the ethnography are moments of contest and friction through which social and political relations come to be figured, disrupted and reconfigured. Such moments are used to illustrate the ways in which queer activism and ethnographic research involve similar and often overlapping sorts of ethical consideration.

As the title suggests, the text deals with queer activism, yet it might be more precisely described as an ethnography about the emergence of lesbian organizing in India. Dave carefully opts to use the term *lesbian* to refer to identities and practices, even if they do not fit neatly within that category. She explains her use of the term as a starting point for describing intimacy between women—an acknowledgment that the concept of lesbian, though it may have its origins in the West, retains no essential or stable meaning as it travels across cultures. She writes: “The term ‘lesbian,’ then, is one of writerly convenience but also of potentiality—instead of thinking of ‘lesbian’ as a fixed thing that people are or are not, I see it as a practice of enunciation for a set of loosely recognizable behaviours and longings” (p. 20). Similarly, the term *queer* is invoked to harness the limitations and potentiality of “the-thing-that-is-not-yet-imagined” (p. 20). These terms help with setting up the paradox at the centre of the text: the trade-off between confinement and emergence. As in all decision-making, there are compromises that inevitably disrupt and foreclose current and future possibilities. Yet, within the forms of queer activism that Dave examines, moments of confinement or limitation are always paired with the arrival of new arrangements that move activism forward. This movement between closure and potentiality is part of her understanding of queer activism as ethical practice. Drawing on Elizabeth Povinelli’s (2001) theorization of commensurability and radical difference, Dave shows how semi-autonomous queer activist concerns and demands are often addressed as though they were commensurate with the aims and goals of NGOs and the Indian state. As her account finely illustrates, activism is propelled by the desire to maintain alliances, as well as the need to protect against intrusive and regulatory forms of encroachment.

What distinguishes Dave’s book from much of the existing work on affect and politics is its attention to the ways in which affect leads and provides the momentum for the feelings, emotions and desires that colour queer activism. Descriptions of conflicts and disagreements between activists and activist groups are addressed as integral to the constitution of social and political arrangements and to their transformation. The Introduction, as well as Chapters 1 and 2, explores the public emergence of the category of “lesbian” in India against a backdrop of earlier articulations of gender and sexuality. Sifting through an archive of correspondence between members of Sakhi, a Delhi-based lesbian network, the author traces a realm of lesbian existence in the making. She describes it as a dual world in which the circulation of letters and the rare intermingling of bodies generated distinctive experiences of time and space (p. 57). She describes the ground-level work of connecting women, focusing primarily on the work of Sangini,

a support line and help group for women seeking women. While the group served several purposes, among them helping women to find romantic partners, it remained largely a private organization where women socialized, connected and shared experiences. Yet, as she notes, it was political in a different sense. Invoking the work of Michel Foucault, Dave notes that while the group lacked clear aims in terms of public activism, it provided a means through which women could carry out a kind of ascesis: “that ethical work we perform on ourselves, through a multiplicity of relationships,” which ultimately renders us open to receiving pleasure and happiness (p. 87). This is, in her view, key to the ethical practice of activism. In a sense, the emergence of public forms of activism, such as the formation of the multi-issue group People for the Rights of Indian Sexual Minorities (PRISM), could not have taken place without the slow yet passionate political work of forging intimate and personal relationships.

It is in the second half of the book that Dave more directly focuses on the paradox of public forms of activism and more elaborately lays out the book’s central argument about containment and emergence. In Chapter 3 Dave considers the different meanings and experiences that arise from the incorporation of *lesbian* into the lexicon of women seeking women in India. She discusses the context for lesbian activism as a response to and as inseparable from existing frameworks of Third World activism, which reproduce colonial notions of feminine virtue through the figure of the vulnerable Third World woman. As Dave argues, the politicization of lesbian sexuality was seen by some women’s activist groups as a deviation from more pressing and fundamental issues of poverty. As a result, lesbian issues were often dismissed as being “western” in orientation, as complicit with foreign/colonial powers and as an affront to feminist solidarity.

This question about which issues ought to take precedence over others is further explored in Dave’s discussion of the contradictions of public recognition. In the fourth chapter, she discusses conservative and progressive responses to Indo-Canadian filmmaker Deepa Mehta’s *Fire* as part of a mass public emergence of lesbian identification. Through the backlash to the film in 1998, possibilities for identification, activism and recognition became imaginable. Skirmishes between organizations made up of gays and *kothis* (a broad identity category in use in South Asia that includes men who have sex with men), such as Naz Foundation, and more inclusive groups, such as PRISM, of which Dave was an active member, are not merely interrogated as evidence of existing schisms along lines of identity and political orientation, but are themselves points at which identities and politics are worked out in the realm of queer activism. The newfound visibility of lesbians was harnessed by progressives and conservatives alike as they fought to define what ought to count as properly “Indian.”

Chapter 5, perhaps the most sophisticated section of the text, stands out as a deeply contemplative piece on the fraught relationship between law and justice, as well as the ways in which queer activists’ attempts to liberate sexuality from the constraints of criminality ultimately ensnared gender relations in tighter constraints. In July 2009, Section 377 of the Indian Penal Code was struck down by the High Court of Delhi—essentially decriminalizing homosexuality in India. What followed from the decision was not a unified outpouring of support but instead a splintering of uneasy and divergent

responses. Following the High Court decision, Naz created a petition that called for the “reading down” of the law, which would limit the interpretation of the existing law without striking it down completely. This action raised concerns about the gender neutrality of the proposed recommendations, which many women’s activists felt would leave women vulnerable in cases of sexual assault. What the conflict unearthed was the unequal playing field of activism, in which some individuals demonstrated a stronger sense of competence and ability within existing frameworks of intelligibility. Dave’s astute analysis shows how the intensity of the clash worked within the logics of the legal framework, wherein only certain activists were granted access to conversations and debates about the aims of queer activism.

Throughout the book Dave reminds her reader that *activism is ethical practice*, which means that every encounter presents new opportunities and moments for rupture and deliberation. In her account, queer activism requires constant negotiation and compromise in forging and sustaining ties across lines of difference. In working alongside activists with distinct and sometimes conflicting objectives, Dave’s fieldwork led her into situations where her presence at meetings and debates meant that she needed not only to win the trust of fellow activists but also to make decisions about which ones were her allies and which ones were not. As such, it is clear that Dave’s own activist research involved a kind of ethical practice, but it is unclear whether this approach can be extended to other forms of activism or political campaigns less easily categorized as inclusive, progressive or tending toward social acceptance.

Queer Activism in India is an essential new work in the anthropology of politics, and it makes an important contribution to the growing field of queer and feminist ethnography. The text is written in accessible language and is suitable for an upper-level undergraduate class or a graduate seminar. It melds contemporary theory, participant observation and textual analysis in describing shifting configurations of sexuality and nationhood in India, as well as the multiple and contradictory movements toward and resistance to official and normative forms of LGBT political legibility.

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Dias, Amanda S. A. *Aux marges de la ville et de l'État. Camps palestiniens au Liban et favelas cariocas*, Paris : Karthala, 2013, 411 pages.

Recenseuse : Paula Vasquez Lezama
Centre national de la recherche scientifique–Centre d'études sociologiques et politiques Raymond Aron

L'ouvrage d'Amanda Dias constitue une comparaison audacieuse et stimulante entre une favela brésilienne et un camp de réfugiés au Liban. Ce travail est issu de sa thèse doctorale

et la présentation des analyses et la composition des chapitres est remarquablement équilibrée. Le livre est composé de trois parties, qui se rapportent à trois activités tant du chercheur engagé que des « intellectuels organiques » que la chercheuse a rencontré sur le terrain : percevoir, habiter et agir. La démarche réflexive de l'enquête est présentée avec rigueur. Dans chacune de ces parties, l'auteur interroge simultanément le temps – l'histoire mais aussi les événements du présent – et l'espace – les lieux mais également le poids de la géopolitique – de la vie quotidienne dans une favela de Rio de Janeiro et dans un camp de réfugiés palestiniens situé au Liban.

D'une certaine manière, le concept d'hétérotopie de Michel Foucault est transversal à la problématisation des espaces urbains que propose Amanda Dias. Michel Foucault suggère, dans les textes que Dias cite dans son livre, la possibilité de développer une science supposée définir les « lieux autres » – soit ces espaces qui, définis par la société, produisent de l'exclusion, ou du moins catégorisent une certaine partie de la population, et ce faisant, la marginalisent. Ces espaces assignent un lieu propre à des groupes sociaux, en marge du système mais régulé par celui-ci. L'hétérotopie c'est donc avant tout le « lieu autre » mais aussi le « lieu de l'autre » comme espace assigné par autrui.

Ainsi, la place imaginée et imaginaire occupée par les habitants de la favela Acari et du camps de réfugié Beddawi dans la société brésilienne ou libanaise est simultanément tant un lieu de vide d'institutions, de ségrégation spatiale et de stigmatisation, qu'un lieu de résistance et de vivre ensemble. Dans la première partie, « Percevoir », l'auteure insiste particulièrement sur la construction sociale de la favela en allant de l'analyse d'une tradition ancienne de la sociologie brésilienne sur la perception du *favelado* comme altérité à la société formelle, jusqu'aux « théories du complot » qui prédominent dans le camps de réfugiés palestiniens au Liban. Le pari est tenu. Les deux réalités sont imbriquées de jeux de perception qui agissent comme des miroirs de la société dominante. Peut-être les pages les plus réussies de cette partie sont celles consacrées au long travail de terrain mené au Liban où l'auteure prend agilement en compte le poids de la dimension globale du conflit israélo-palestinien dans ce jeu de miroirs. Tenir le pari de la comparaison de ces deux terrains si distants est un défi épistémologique. Les réfugiés palestiniens ont un statut officiel qui leur nie l'accès à la citoyenneté libanaise ; d'une certaine manière, ils sont des *parias* écrasés par l'un des conflits les plus dramatiques et médiatisés du monde contemporain. Dans le cas du Brésil, c'est la perception de la favela comme « l'échec » du processus de constitution d'un État-nation moderne et « développé » qui marque la perception sociale de l'espace.

La deuxième partie de l'ouvrage, « Habiter » est peut-être la plus riche du point de vue ethnographique. Un travail consistant d'anthropologie de l'espace aborde de manière critique le processus d'urbanisation du camp libanais et d'intégration de la favela carioca à la ville. On regrettera que l'auteure n'entre pas en dialogue avec les travaux de l'anthropologue brésilien Roberto da Matta, et plus particulièrement avec ses analyses fines des espaces de la « maison » et de la « rue » comme des lieux imbriqués de significations multiples. Mais les références mobilisées par Dias demeurent convaincantes, dans la mesure où l'auteure mène une démarche conceptuelle tant éclectique que critique. Ainsi, à la question si la vie dans le camp ou la favela relève du concept de « vie nue » proposé par Giorgio

Agamben (1997), dans le célèbre essai où il différencie la *zoe* de la *bios*, Dias répond qu'il est nécessaire pour y répondre de prendre en compte le point de vue à partir duquel on propose cette conceptualisation. Est-ce du point de vue de l'institution ou des habitants ? Pour les institutions humanitaires, oui, il s'agit d'une « vie nue », car les résidents de la favela ou du camp sont réduits à leurs besoins physiques. Néanmoins, pour les artistes et les intellectuels qui y habitent, le développement de liens qui relèvent de la vie sociale font que leur quotidien est aussi *bios* (« vie politique »). Avec justesse et sans simplification, l'auteure introduit dans l'analyse de ces espaces confinés une relativité utile sans pour autant tomber dans le relativisme. Car comme elle le dit elle-même dans la conclusion de son ouvrage, le camp et la favela constituent des « lieux de chez soi » (p. 380), au sens plein de ce terme.

« L'action » est le fil conducteur de la troisième partie de ce livre. C'est par le biais de la reconstitution biographique de quatre interlocuteurs – deux réfugiés palestiniens et deux résidents de la favela – qu'une microsociologie de l'action est présentée avec rigueur. Le parcours de ces quatre intellectuels, Burhân, Nizâr, Deley et Wesley, tout à la fois artistes, poètes, militants engagés et promoteurs d'activités culturelles, donne de l'épaisseur à l'articulation des niveaux « micro » et « macro » du quotidien dans les deux endroits. Les questions de la quête d'identité, de la violence sociale et policière, du militantisme, de la stigmatisation que ces populations subissent au sein des deux sociétés où ils évoluent sont transversales à leurs parcours, et leur analyse approfondi notre compréhension de la vie tant dans le camp de réfugiés que dans la favela. Le militantisme de ces quatre personnages montre bien, par exemple, les différentes formes que peut prendre l'agentivité, les différentes manières par lesquelles les sujets résistent à leur stigmatisation jusqu'à acquérir un statut social différent de celui qui leur avait été préalablement assigné par l'environnement dominant. Ces marges de manœuvre dans l'action des individus se renforcent par des liens de solidarité qui se mettent progressivement en place.

Tant la violence dans les favelas de Rio que les enjeux de sécurité dans les camps de réfugiés palestiniens au Liban font irruption dans la vie quotidienne de ces espaces. L'État se fait présent justement par le biais de l'application du principe de la violence légitime et par l'exercice du monopole de la violence. D'une part, la présence de l'État dans un but répressif et d'autre part, son absence en ce qui concerne les moyens nécessaires pour l'exercice de la citoyenneté, relève d'une dialectique qui constitue peut-être la contribution la plus importante de ce travail au champ de l'anthropologie politique.

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Beaupré, Sylvain, *Des risques, des mines et des hommes*, Québec : Presses de l'Université du Québec, 2012, 134 pages.

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Quelle est la perception du risque chez les mineurs de fond et comment celle-ci est-elle devenue une condition objective du travail dans les mines? Ce sont des questions auxquelles tente de répondre l'ouvrage de Sylvain Beaupré, anthropologue spécialiste du travail et de l'objectivation de la pratique. Pour ce faire, il explore l'histoire de la région, c'est-à-dire l'Abitibi-Témiscamingue, depuis sa colonisation initiale survenue à la fin du XIXe siècle jusqu'à la première moitié du XXe siècle, au moment où le boom de l'exploitation minière s'y est produit. Natif de la région et issu lui-même d'une famille de mineurs, Beaupré parvient à donner voix à ses interlocuteurs de manière agile et intimiste, tâche qui a certainement été facilitée par sa maîtrise du lexique propre aux mineurs locaux. L'étude s'appuie sur l'importante littérature qui existe sur les enjeux de l'exploitation minière, du travail du mineur de fond et de ses risques, ainsi que de nombreuses entrevues et observations de terrain auprès de différentes générations de mineurs québécois et d'ailleurs. De manière convaincante, l'auteur démontre non seulement l'existence d'une culture minière fortement homogénéisée à un niveau global, mais surtout, l'existence d'une mécompréhension de la subjectivité des mineurs dans le contexte de la gestion du risque au travail.

Si l'on veut saisir les rapports qui existent entre l'organisation du travail et la culture minière en général, il est nécessaire, avant toute chose, de comprendre comment le travail s'organise dans le secteur minier. Beaupré décrit l'isolement physique des mineurs par rapport à leurs supérieurs, les travailleurs se retrouvant seuls au sous-sol d'une mine. Ils en viennent alors à se sentir complètement autonomes, c'est-à-dire, responsables de leurs actes, de leurs décisions et des risques encourus. L'appréhension subjective du risque serait par ailleurs directement influencée par l'octroi de primes de rendement et par la pression imposée par les supérieurs sur les mineurs de répondre à des quotas de productivité – soit deux facteurs clés de la manière dont les mineurs décident de gérer une situation risquée. Un autre aspect abordé par l'auteur, à propos de l'organisation du travail en mines de fond, est le recours à la sous-traitance, où des mineurs de « seconde classe » sont alors embauchés dans le but d'effectuer des tâches plus dangereuses à l'intérieur des mines. Le fait pour ces mineurs de recevoir des primes de rendement plus importantes, alors qu'ils perçoivent des salaires moindres que leurs collègues de « première classe », serait le principal facteur de dissension entre ces deux groupes, rompant ainsi le lien de complicité pourtant essentiel à l'amélioration des conditions de sécurité au travail. La perception du risque chez les mineurs de fond serait dès lors circonstancielle et instable, et relèverait des rappels et des oublis, conscients ou non, pour se redéfinir à chaque moment. En effet, Beaupré y voit toutes les dynamiques d'un jeu, avec des règles auxquelles le mineur de fond doit se conformer pour rendre son travail possible. Autrement dit, face à une prise de conscience croissante des nombreux risques auxquels il devra se confronter tout au long de sa carrière professionnelle, c'est l'adhésion à l'*illusio* du travail minier, c'est-à-dire, la croyance en l'intérêt du jeu et des valeurs liées au champ où il s'active (Bourdieu 1997), qui rendra son travail quotidien viable, voire durable. La perception du risque chez les mineurs de fond dépendrait donc de l'inégalité des conditions de travail ainsi que des avertissements donnés aux « distraits » parmi les travailleurs miniers, avertissements qui chaque fois sont gérés par eux de manière arbitraire.

Dans la dernière partie de son ouvrage, Beaupré a recouru à diverses méthodologies pour analyser les récits collectés lors de son travail de terrain, et proposé un modèle idéal de rapport au risque chez les mineurs interrogés. À partir des nombreux récits recueillis majoritairement en Abitibi-Témiscamingue, mais aussi au Chili, en Belgique et au Royaume-Uni, l'auteur découvre une culture minière remarquablement homogène, dans laquelle l'exposition des ouvriers miniers à des situations de travail dangereuses signifie inévitablement la perte graduelle de leur conscience des risques que leur travail comporte. Il est toutefois surprenant de constater que, malgré l'existence de données statistiques concernant les risques associés à leur métier, les travailleurs miniers tendent à en réfuter le caractère dangereux et vont même jusqu'à élaborer des stratégies empreintes de réalisme professionnel pour alimenter leur propre déni. Déni et conscience semblent donc cohabiter harmonieusement dans l'opinion collective, grâce entre autres aux salaires très élevés offerts par les industries minières locales, révélant d'un côté une sorte de résignation généralisée et de l'autre, un rejet de toutes éventualités fatales, paradoxe de l'illusion du plein contrôle sur ce qui est incontrôlable. Néanmoins, pour l'auteur, la structuration de la culture minière serait instaurée par la présence d'agents disposant d'un grand capital symbolique. Ainsi, plusieurs contremaîtres jettent la responsabilité des catastrophes de chantier et des accidents de travail sur les mineurs eux-mêmes, qui font souvent l'objet de représailles à la suite de tels événements. Sur ce point, Beaupré rappelle non seulement que le mineur est la principale cause d'accidents, mais qu'il demeure aussi le responsable de toutes les conditions de réussite de l'organisation et cela, sans pour autant que l'influence des contremaîtres soit négligeable. Finalement, Beaupré cite le travail de Crozier (1994), Hassid (2008) et Cleary et Malleret (2006) pour faire ressortir l'éloignement qui existe entre les dirigeants des entreprises minières et la culture ouvrière. Pour l'auteur, la gestion des risques demeure avant tout une histoire de communication, mais aussi, une histoire d'organisation, la communication passant inévitablement par l'organisation hiérarchique du milieu de travail, la rendant plus ou moins limpide ou opaque selon le cas. En ce sens, la cohabitation contradictoire dans la gestion des mines entre l'implantation de plusieurs mesures visant la sécurité au travail, et la concession de primes de rendement n'est que symptomatique des lacunes structurelles qui subsistent encore dans ces dynamiques communicationnelles propres au secteur minier.

En somme, l'œuvre de Beaupré s'avère être un travail aussi minutieux que didactique pour la compréhension des liens qui existent entre les aspects objectifs de l'organisation du travail et ses conséquences sur la prise de conscience du risque chez les travailleurs des mines de fond. Par son analyse, il met en lumière cette relation fondamentale entre les conditions de travail et les relations qu'entretient le travailleur avec l'entreprise qui l'embauche. Étant donné le caractère singulièrement universel de la culture minière, produit en grande partie par la mondialisation de l'industrie extractive à l'échelle planétaire, tout porte à croire que l'auteur partage ici des réflexions qui dépassent nettement le contexte régional des mines de fond de l'Abitibi-Témiscamingue.

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Recenceuse : Audrey Laurin-Lamothe
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Dans la foulée de la grève étudiante de 2012 au Québec, plusieurs ouvrages sont parus. On notera en particulier celui de Poirier St-Pierre et Éthier (2013), *De l'école à la rue : les coulisses de la grève étudiante*, qui livre un récit de la grève à partir de leur expérience au sein de la CLASSE (Coalition large de l'ASSE, l'Association pour une solidarité syndicale étudiante). Les auteurs exposent les principes et les orientations majeures de l'organisation la plus critique à l'égard de ce que certains nomment « le naufrage de l'université » (Freitag 1995). Dans une autre perspective, celle de la militance radicale, qui a fait de la rue le théâtre de la lutte collective, les auteurs de *On s'en câlisse : histoire profane de la grève étudiante de 2012* (Collectif de débrayage 2013) analysent la grève et les enjeux qui l'ont sous-tendue depuis le cadre philosophique et politique qui lui a donné naissance et auquel elle a ensuite contribué. Le livre *Un Cégep dans la rue. La grève étudiante de 2012 au Cégep régional de Lanaudière à Joliette* offre un regard inusité sur la grève : alors que, dans le livre *On s'en câlisse*, les étudiants sont anonymes, non affiliés à un établissement particulier et que le récit repose sur l'expérience collective, le livre dirigé par F. Trudel met au premier plan de l'ouvrage le portrait des acteurs de la grève dans un établissement particulier, le Cégep régional de Lanaudière à Joliette.

L'avant-propos permet de recadrer le livre dans son contexte d'émergence et d'en retracer les origines. L'auteure y signale les moments marquants de la grève de cet établissement, soulignant notamment le respect du processus démocratique attendu des assemblées générales, le taux élevé de participation aux votes de grève et de reconduction (des votes à l'isoloir ou réalisés électroniquement), l'absence d'affiliation, que ce soit avec l'ASSE ou la FEUQ (Fédération étudiante collégiale du Québec), le Regroupement des étudiants de Joliette et la discrétion des étudiants en faveur de la hausse des frais de scolarité (aucun affrontement n'a eu lieu ni de demande d'injonction). Le mouvement de rejet de la Loi 12 (projet de

loi 78), restreignant notamment la liberté de manifestation et l'obligation d'un retour en classe, a mené à la création du Comité d'action populaire à Joliette, agissant comme relais au mouvement de contestation.

L'objectif du livre est d'exposer, à partir des 11 semaines durant lesquelles la grève de ce Cégep a eu lieu, l'expérience de la militance des étudiants et étudiantes, dont une majorité était gréviste pour une première fois. Pour ce faire, il s'appuie sur des photographies, la plupart réalisées par la directrice de l'ouvrage, utilisées comme pilier de la mémoire individuelle et collective de l'évènement : « Dans son sens anthropologique, la photo témoigne du vécu. Elle permet de visualiser le terrain de l'évènement, d'illustrer les lieux et les personnes. Ici, la photo est une trace additionnelle du Printemps érable » (p. 11). À ces images, viennent s'ajouter de courts témoignages de personnes particulièrement actives pendant la grève. Les quarante cégépiens et cégépiennes sollicités ainsi que quelques professeurs et membres du personnel avaient la consigne de fournir un court texte, sans lien avec les photographies, dans lequel ils livraient leur vécu de la grève. Le but avoué étant d'en faire un album souvenir. Trente-cinq étudiants ont répondu à la demande formulée par F. Trudel.

Certains d'entre eux ont fait la mention de souvenirs irrésistibles de piquetage, d'occupations de locaux, de manifestation dans la neige de février et de mars autant que dans la canicule de l'été. D'autres insistent sur le caractère profondément formateur que la grève a pu avoir sur eux : « Comme plusieurs de mes camarades, je me suis forgé une façon de penser et des convictions à travers cette lutte et j'en suis extrêmement fier » (M.C. Cyr, p. 25). Le développement de la pensée critique renvoie parfois explicitement à un examen radical des présupposés : « Je crois que nous avons assimilé le discours voulant que notre génération fût la plus individualiste de toutes, qu'elle se souciait peu de l'autre. [L]e Printemps érable était d'abord et avant tout le réveil d'une génération, une prise de conscience de nos valeurs, de nos idées, de notre force collective » (C. Sylvestre, p. 30). En dépit du mépris rapporté dans les témoignages envers les étudiants de la part des forces policières, des journalistes ou encore d'une partie de la population complètement réfractaire au mouvement, un cégépien affirme : « Il est grand temps que l'on arrête d'avoir peur, que l'on arrête d'accepter l'inacceptable. Il faut toujours se rappeler que le gouvernement est au service du peuple et non l'inverse » (J. Laplame, p. 99). La surprise devant la force d'un mouvement de contestation dans un Québec engourdi par les politiques néolibérales représente également un sentiment partagé par plusieurs : « J'ai appris qu'un groupe de personnes avec des convictions et des valeurs pouvait avancer malgré les lois, des contraventions, des matraques et des injonctions. J'ai appris que la solidarité est une valeur beaucoup plus forte que ce que la majorité des gens croient » (C. Mondor, p. 65).

La force de ce recueil est sans doute la liberté, à tous les niveaux, de style comme de contenu, avec laquelle les acteurs de la grève écrivent leurs propres impressions. Il ne s'agit pas là d'une contribution essentielle pour la compréhension de l'évènement, mais le lecteur pourra sans doute apprécier le caractère attachant des propos qui y sont tenus et qui expriment le besoin de se souvenir et de témoigner, au travers de l'objet tangible qu'est cet album, de l'évènement marquant qu'a été le printemps érable au Québec.

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Vásquez Lezama, Paula, *Le Chavisme. Un militarisme compassionnel*, Éditions de la Maison des sciences de l'homme, 2014, 149 pages.

*Recenseur : Ricardo Peñañiel
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Depuis son apparition « explosive » au centre de l'espace public vénézuélien, lors de la tentative avortée de coup d'État du 4 février 1992, jusqu'à sa mort et même au-delà, la figure du défunt président vénézuélien Hugo Chávez n'a cessé de susciter des passions. Élu président en 1998 et reporté au pouvoir sans interruption jusqu'à sa mort avec des taux d'approbation de l'ordre de 60%, Chávez est considéré comme un sauveur de la patrie par ses partisans et, au mieux, comme un autocrate populiste par ses détracteurs. Le livre de Paula Vásquez Lezama prétend se situer au-delà de ce manichéisme pour jeter un éclairage nouveau sur le phénomène de la « révolution bolivarienne » grâce à une approche « historique, anthropologique et politique ». Il aborde l'histoire récente du Venezuela à la lumière de « parcours de vie » et d'expériences concrètes qui donnent une profondeur microsociologique aux modifications complexes des relations entre l'État et la société dans ce pays.

Après avoir rappelé les origines historiques du militarisme et du bolivarisme vénézuéliens ainsi que de l'importance du pétrole dans la construction de l'État et de la société vénézuélienne, Vásquez Lezama cherche à montrer les articulations spécifiques du projet chaviste. Ce dernier est ici considéré comme un « militarisme compassionnel » qui donne une inflexion « théologico-politique » aux figures fondamentales d'un imaginaire politique déjà présent. Ainsi, le livre montre comment Chávez s'appuie sur un « culte à Bolívar » – présent depuis des décennies dans l'ensemble des institutions vénézuéliennes – pour chercher à légitimer une militarisation du politique et du social par l'identification des militaires au « peuple » au sein d'une conception « révolutionnaire » et « rédemptrice » (théologico-politique) de leur « sacrifice pour patrie ». De même, la reprise de contrôle, par l'exécutif, de la pétrolière publique PDVSA (*Petróleos de Venezuela, S.A.*), suite à la grève-lockout de décembre 2002 à février 2003, est mise en contexte en fonction du mot d'ordre de « semer le pétrole » (*sembrar el petróleo*) qui, depuis les années 1930, a servi à la construction de l'unité nationale. Selon l'auteure, c'est ce contrôle direct de l'exécutif sur la production d'hydrocarbures

qui aurait permis de financer la dimension « compassionnelle » du dispositif de légitimation du pouvoir « bolivarianiste ».

Le livre se divise en deux parties. La première aborde la construction du militarisme compassionnel en fonction des stratégies « internes » au chavisme, liant le projet et l'action politique du mouvement aux événements et contextes sociohistoriques. La seconde partie, davantage ethnographique, s'intéresse aux effets de cette idéologie dans la vie concrète de personnes se pliant ou résistant à l'injonction de se situer dans les catégories de la « rédemption » ou de la « dignification » pour devenir visibles et audibles auprès de l'État.

Ainsi, la première partie montre comment le mouvement bolivarianiste capte des imaginaires de la violence et de la souffrance développés, notamment, autour des événements du *Caracazo* (émeutes contre l'austérité de 1989), de la tentative de coup d'État de 1992 et de l'état d'urgence de décembre 1999, suite à *La Tragedia* (La Tragédie, soit des milliers de morts et de déplacés causés par de gigantesques glissements de terrain provoqués par des pluies torrentielles). La relecture historique, par le chavisme, de ces trois événements tendrait à produire une légitimation de la militarisation de l'État et de l'action discrétionnaire (non contrôlée par des corps intermédiaires), de l'exécutif autant que des militaires, au nom d'une compassion, morale et normative, envers les pauvres.

Vásquez Lezama montre alors comment la « réhabilitation » historique des pillages populaires du *Caracazo* tend, d'une part, à établir une distinction morale entre les « bons » pilleurs (encadrés par les militaires dans un projet de changement social) et les « mauvais », refusant les places attribuées par le gouvernement. D'autre part, cette relecture du *Caracazo* vise la « rédemption » des militaires (impliqués dans la répression de l'époque) par leur engagement « compassionnel » dans des projets civilo-militaires de lutte contre la pauvreté. Paradoxalement, cette réhabilitation de la valeur historique des émeutes de 1989 se heurte aux associations de familles des victimes de la répression du *Caracazo*, dans la mesure où elle tend à consolider l'impunité des militaires responsables de la répression et à imposer une lecture historique instrumentalisant la souffrance des victimes.

Cette légitimation des militaires par leur engagement dans des actions sociales est renforcée par le second moment fondateur du chavisme : la tentative de coup d'État avortée du 4 février 1992, dont l'anniversaire devient la « journée de dignité nationale ». Cette journée commémore les « martyrs » de l'insurrection dans un rituel de résurrection sécularisée empruntant les symboles non seulement du patriotisme des guerres d'indépendance, mais également d'une gauche guévariste exaltant le sacrifice héroïque des combattants. Dans les mots d'Alí Primera, un regretté chansonnier communiste extrêmement populaire au Venezuela et continuellement revendiqué par Chávez : « Ceux qui meurent pour la vie ne peuvent être appelés morts ».

Néanmoins, c'est autour du traitement de *La Tragedia* (de décembre 1999) que s'articule pleinement le « militarisme compassionnel » constituant, selon l'interprétation de l'auteure, la matrice du chavisme. En décrétant l'état d'exception pour répondre à l'« urgence » de la situation, Chávez parvient à suspendre la Constitution « moribonde » de l'ancien régime, à concentrer toutes les prérogatives de l'État en sa seule personne et à militariser l'aide sociale dans un dispositif humani-

taire d'urgence pérennisée. En effet, selon la démonstration de Vásquez Lezama, *La Tragedia* est un cas paradigmatique en fonction duquel le gouvernement Chávez a pu expérimenter sans contraintes son militarisme compassionnel en embrigadant des milliers de personnes dans des camps de « sinistrés » (*damnificados*), aménagés dans les casernes et structurés de manière militaire en fonction d'une série de valeurs d'ordre et de sacrifice censées permettre aux « bénéficiaires » d'en sortir « dignifiés ».

L'analyse ethnographique, dans la deuxième partie de l'ouvrage, des trajectoires de vie de quelques-unes de ces « victimes », et notamment de celles considérées « indignes d'être dignifiées », se veut alors une critique de l'ensemble du modèle militariste compassionnel à partir de la perspective de ses anti-bénéficiaires. L'analyse montre comment, pour être reconnus par le pouvoir et bénéficier de l'« aide » devant les « dignifier », les personnes sinistrées devaient (et doivent encore) s'inscrire au sein d'une subjectivation politique précise, conforme à un modèle moraliste et militarisé de transformation sociale. En fonction de ce modèle, on assiste à une incitation au discours sur la souffrance – et à une confiscation (état-isation) du savoir sur cette dite souffrance –, impliquant une série de contraintes énonciatives nécessaires à la « reconnaissance » en tant que « bonne » victime de même qu'à des stratégies d'évitement d'une assimilation à l'opposition.

L'étude montre ainsi comment les « victimes » sont contraintes d'investir ou d'incorporer les catégories officielles (bureaucratisée et militarisées) de la dignification, même (et surtout) lorsqu'elles doivent en faire la critique : par exemple, pour refuser un logement insalubre ou trop éloigné du lieu d'origine des sinistrés (parfois jusqu'à 375km!) ou pour obtenir de l'aide après avoir perdu (injustement) le statut de victime. Ces victimes – symbolisant l'ensemble de la population pauvre du Venezuela –, passent de l'invisibilité ou de l'inexistence dans l'ancien régime à une injonction d'existence dans l'actuel. Existence qui ne peut advenir que dans les formes de prise en charge et de mise en récit de la version officielle de la « dignification », attribuant des rôles et des statuts conformes à un enrégimentement de la population et à une subordination directe au souverain (Chávez), seul capable d'infirmier des décisions bureaucratiques et accorder des statuts exceptionnels.

Le livre se termine par une analyse de cas de résistance à la « violence institutionnelle » de cette « subjectivation assujettie ». Une résistance « microsociologique » et « subjective », ne se traduisant pas nécessairement par des formes d'opposition organisées, mais qui ne sont pas moins politiques et dont les effets qui se vivent au quotidien sont abordés grâce à l'enquête ethnographique. Des cas de « crucifixion » ou de mutilation publique appelés « grève du sang » sont abordés comme des exemples de reprise de contrôle sur son corps et sur le récit de sa souffrance confisqués, de même que d'autres cas de refus d'inscription dans les catégories officielles.

Extrêmement intéressants, ces cas tendent, cependant, à masquer les formes de résistance qu'on aurait pu trouver au sein même des récits dits « assujettis ». De manière générale, l'étude fonctionne par ellipses, que le lecteur doit compléter, entre les exemples et leur possible généralisation à l'ensemble du pays. On s'étonne, aussi, du manque d'espace accordé aux réflexions théoriques ouvertes par cette étude, par exemple sur la « banalisation de l'état d'exception » (Agamben 2003) ou

sur le « paradigme des camps » (Arendt 1972), alors que le texte cite fréquemment Hanna Arendt, sans toutefois la travailler. Néanmoins, le travail d'analyse critique présenté par Vásquez Lezama représente un précieux apport à la réflexion sur la nature des relations entre le nouvel État bolivarianiste et la population vénézuélienne qu'il s'agira de poursuivre dans des études plus globales.

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Notice of Errata

The performance review of *Hear Me Looking at You*, written and performed by Dara Culhane and reviewed by Brian Batchelor, was published in *Anthropologica* 56(2) with the following errors:

On p. 473, for “During a rare moment of lucidity, her father caught her attention while she stood at his bedside and cautioned her: ‘Don’t forgive me.’” read “During a rare moment of lucidity, her father caught her attention and cautioned her: ‘Don’t forgive me.’”

On p. 474, for “At some point, Culhane’s grandmother became the subject of a public scandal (she had a relationship with a Protestant) that resulted in her leaving Ireland and living ‘in exile’ in Montreal.” read “At some point, Culhane’s grandmother became the subject of a public scandal that resulted in her leaving Ireland and living ‘in exile’ in Montreal.”

On pp. 474 and 475, for “Gerry Culhane,” read “Garry Culhane.”

On p. 474, for “Their house was a hub for like-minded citizens before the Easter Rising of 1916 put an end to such a political possibility.” read “Their house was a hub for like-minded citizens.”

On p. 474, disregard the statement “Into this environment, Gerry is born and he inherits his mother’s Irish republican zeal.” Note that Garry was born in Ireland, not Montreal.

On p. 474, for “The performance’s first act allows Culhane to recount stories of her unconventional childhood as the product of a tumultuous marriage between her Jewish, activist mother and her Irish father, Gerry, a card-carrying member of the Communist Party.” read “The performance’s first act allows Culhane to recount stories of her unconventional childhood as the product of a tumultuous marriage between her Jewish, activist mother and her Irish father, Garry.”

On p. 474, disregard the statement “With no set place to live, Dara and her sister are sent to boarding schools.”

Anthropologica regrets these errors of the reviewer.

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Bibliographie internationale d'anthropologie

sociale et culturelle / International

Bibliography of Social and Cultural

Anthropology

Biological Abstracts

Bulletin signalétique 521 Sociologie / Ethnologie

Canadian Periodical Index / Index des

périodiques canadiens

Culture, Langues, Textes : la Revue de Sommaires

International Bibliography of Periodical

Literature

ISI Web of Knowledge Current Web Contents

Psychological Abstracts

Science Culture

Sociological Abstracts

ZellerDietrich Bibliographische Verlage

Applied Anthropology: Disciplinary Oxymoron?

Regna Darnell - 2014 Weaver-Tremblay Award Winner

Kinship Travel: Relatedness Through International Tourism and Travel Networks / Le voyage de parenté : La création de liens familiaux par le tourisme international et les réseaux de voyages

Guest Editors / Rédactrices invitées : Frayda Cohen, Amy Speier and/et Susan Frohlick

Introduction: Kinship Travel

Frayda Cohen, Amy Speier and Susan Frohlick

Introduction : Le voyage de parenté

Frayda Cohen, Amy Speier et Susan Frohlick

Czech Hosts Creating "a Real Home Away From Home" for North American Fertility Travelers

Amy Speier

Tracing the Red Thread: Chinese–U.S. Transnational Adoption and the Legacies of "Home"

Frayda Cohen

Blood, Sweat and Dummy Tummies: Kin Labour and Transnational Surrogacy in India

Amrita Pande

"Souvenir Babies" and Abandoned Homes: Tracking the Reproductive Forces of Tourism

Susan Frohlick

Concluding Remarks: Kinship between Choice and Contestation

Yasmin Ergas

Ideas: Papers in Honour of Malcom Blincow

Guest Editors / Rédacteurs Invités : Karl Schmid and/et Shubhra Gururani

Ethnographies of the Political: Honouring Malcolm Blincow

Shubhra Gururani and Karl Schmid

Les ethnographies du politique : en l'honneur de Malcolm Blincow

Shubhra Gururani et Karl Schmid

Ethnic Boundaries in Contemporary Rwanda: Fixity, Flexibility and Their Limits

Laura Eramian

The "Ethical" Framework for Counterinsurgency: International Law of War and Cultural Knowledge in the *U.S. Army and Marine Corps Counterinsurgency Field Manual*

Salman Hussain

Accumulation by Dispossession in Tourism

Karl Schmid

In the Shadow of the Razor Wire: Class and Insecurity in Guatemala's Urban Core

M. Gabriela Torres

From Proactive to Complacent Politics: Reproducing Spaces of Inequality in a Bolivian Marketplace

Kathleen E. Gordon

Power and Violence: The Making of "Modernity": A Conversation with Malcolm Blincow

Daniel Yon

Articles

Livelihoods, Value and Knowledge in Contemporary Paraguay

Elizabeth Finnis and Heather Millman

Local Knowledge/Lacking Knowledge: Contradictions in Participatory Agroecology Development in Bolivia

Jenny Cockburn

The Site of Lead: Social Poisoning in El Salvador

Hugo De Burgos

Targets of Salvation: Ovumila Women with Tuberculosis and the Potential of the "Unreached" in Medical Mission

Rebecca Plett

Cross-Sex Siblingship and Marriage: Transformations of Kinship Relations among the Wampar, Papua New Guinea

Bettina Beer

Processus d'altération de l'obeah à Sainte-Lucie

Marie Meudec

Museum Review

"The Future Looks Rad from Where I Stand": A Review of *Claiming Space: Voices of Urban Aboriginal Youth* at the UBC Museum of Anthropology

Kristin L. Dowell

Review Essay

Scholasticism versus Discovery in Kinship Studies: Review of Maurice Godelier's *The Metamorphoses of Kinship*

Warren Shapiro

Book Reviews / Comptes rendus

Cover image: *The Male Gaze* (image courtesy of Tsimshian artist Kelli Clifton) depicts the unsettling nature of the male gaze on all girls and women but also speaks to racism in our country. Her work, along with Dowell's Museum Review in this collection, highlights the issue of missing and murdered indigenous women in Canada and celebrates Aboriginal art.



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