

ISSUE 11
Summer 2021
ISSN 2057-5696

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MARTIAL ARTS **STUDIES**



Karate-Dachverband NRW e.V. / Steffen Volgtänder

EDITORIAL
LAUREN MILLER GRIFFITH

SEEKING A NEW 'NORMAL'

MARTIAL ARTS IN THE
PANDEMIC
MEYER, MOLLE,
JUDKINS & BOWMAN

DIGITAL AIKIDO TRAINING
UNDER COVID-19 CONDITIONS
KANTZARA & LOOS

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Martial Arts Studies is an imprint of Cardiff University Press, an innovative open-access publisher of academic research, where 'open-access' means free for both readers and writers.
cardiffuniversitypress.org

Journal DOI

10.18573/ISSN.2057-5696

Issue DOI

10.18573/mas.i11

Accepted for publication 25 June 2021

Martial Arts Studies

Journal design by Hugh Griffiths

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SEEKING A NEW 'NORMAL'

LAUREN MILLER GRIFFITH

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DOI

10.18573/mas.131

KEYWORDS

COVID-19, martial arts,
lockdown, recovery, future

CITATION

Lauren Miller Griffith. 'Editorial:
Seeking a New 'Normal''. *Martial
Arts Studies* 11, 1-6.
doi: 10.18573/mas.131

It seems that everywhere I turn, someone is saying that it is time to get back to normal. As a social scientist, this word makes me a little nervous. Designating certain behaviors, ideas, and ways of being as normal implicitly constructs others as being abnormal. Of course, I know what the people saying this mean. They want life to return to the way it was before 2020. They want to travel and socialize freely, they want to attend in-person classes and events, and they want to be done wearing masks. I share these desires, and indeed it feels like a great weight has been lifted from my shoulders as my family has started to resume the activities we enjoyed before COVID. And yet, there are some aspects of 'normality' that we would do well to question, both in general and as martial arts scholars. Many of the pieces in this issue do just that, either explicitly or implicitly. Contemplating what was taken for granted in 'the before times' and what we want to take forward into our 'new normal' presents us as researchers with interesting opportunities not only to flesh out the ethnographic record and develop new theory, but to put these ideas into practice.

DIVERSITY AND INCLUSION

It has been just over a year since George Floyd was murdered by the police after allegedly making a purchase with a counterfeit bill at a Minneapolis Cup Foods store. As a U.S.-based scholar, this anniversary may be at the forefront of my awareness to a greater degree than it is for readers based in other geographic locations, particularly as I have been researching the overlap between capoeira participation and social activism. Still, the outrage over Mr. Floyd's death was not confined to the U.S. and last summer witnessed an eruption of protests over racism and abuses of power in several countries. Within my own social circle, I observed many people who had never before expressed an interest in activism trying to educate themselves about issues like systemic and institutional racism. As someone who studies an Afro-Brazilian art whose practitioners often connect its origins to the resistance of slavery, I sometimes take for granted that our spaces are inherently integrated and 'woke', for lack of a better term. Yet white supremacy often appears in subtle ways that are not readily apparent, especially to those of us who benefit from it.

In the wake of Mr. Floyd's death, my interlocutors were calling upon their fellow capoeiristas to reevaluate taken for granted practices like who they invite to headline big workshops/events and how those individuals are paid. Inequality is perpetuated when martial artists of color are asked to volunteer their time and expertise where others are offered remuneration. Similarly, in an art that claims to have originated as an outcry against slavery, it is ironic that more groups don't interrogate the labor practices of the companies from which they source t-shirts and other merchandise. No doubt, such issues appear in other martial forms as well. If these things are 'normal', perhaps it is best not to return to them.

Editorial
Seeking a New 'Normal'
Lauren Miller Griffith

Anti-Asian racism has also been on the rise over the last year, at least within the United States. This is of little surprise when public figures not only allowed the spread of misinformation about the novel coronavirus, but laid blame on the shoulders of foreign Others by using such inflammatory language as 'the China virus' or, more pertinently to us as martial artists, the 'kung flu'. Hate crimes like the massage parlor shootings in Atlanta, Georgia as well as microaggressions like a person of Asian descent being asked where they are 'really' from or being complimented on their English even if they are natural born U.S. citizens are all evidence of how far we have to go in terms of respecting diversity in all its forms. To what degree do these attitudes manifest in our martial arts communities? How are our teaching and training partners affected by the racist rhetoric that is circulating in society at large and how can/should martial artists show up as allies when members of our communities are targeted?

Standing up against racism is necessary but insufficient for creating truly inclusive spaces. When I look at the composition of my son's karate class, it does not reflect the demographics of the community in which we live. As practitioners and scholars, it is worth considering why this might be. The price point of classes is an obvious place to start. Is it possible to make training more accessible to students from lower-income families without undervaluing the significant labor being done by the teachers? Why is it that in a class of a dozen children, there are only two girls? At what age do children internalize a gendered understanding of martial arts and how might this be different in various parts of the world? If we believe in the power of martial arts to instill positive values in the students who practice them, more equity is needed.

POLARIZATION

Writing from the positionality of a scholar in the United States, I am distressed by the increased polarization in nearly every aspect of social life. Regrettably, it has become normal for many people to disregard evidence and critical thinking in preference of siding with whatever their chosen political party says. Choosing to wear, or not wear, something as simple as a face covering has somehow become a declaration of political allegiance. Anyone who expresses an unpopular opinion is at risk of being 'cancelled'. I don't think this should be normal. As we seek to heal from more than a year of fear, grief, and anger, we need to find a way to resolve disagreements in a more respectful manner that compassionately addresses complex issues.

Here, I think about Daniel Jaquet's piece in this issue on duels. Contrary to how the movies might have it, there were entire codes of conduct governing duels including procedures to even the playing field between men and women. Not to detract from the main thrust of his argument, which questions the disappearance of women from fight books, the

aspect of his article that stuck with me after reading it was the time granted to the parties involved for them to prepare. I'm not suggesting that we return to honor duels, of course, but it might be wise to consider new rules of engagement for the digital age that encourage reflection and deliberation before hastily causing more harm.

When I think about Syd Hiskey and Neil Edward Clapton's article in this issue on visualization as a path to peaceful conflict resolution, the thing that stands out to me is the importance of investing in preparation for conflict, even if that conflict never materializes. By mentally rehearsing the different ways in which one could respond to a confrontation, including both verbal and physical responses, he or she is more apt to remain composed if/when unpredictable situations do arise. All training should really provide this benefit, but it occurs to me that as a relatively privileged white woman, my fights are much more likely to happen over email or social media than they are in real life. How might we translate this idea of preparing for confrontation so that it serves us well in these non-physical settings?

ABUSES OF POWER

In many ways, our martial arts communities are microcosms of what is going on in society at large. The #MeToo movement has had a profound influence in the day-to-day experiences of women and others who do not identify as cisgender men. Increased awareness of the pervasiveness of sexual harassment and abuse, along with the sense that their claims will be believed, has empowered many people to share their own stories. Despite how common these abuses are, it should not be normal.

Many, if not most, martial arts have a hierarchical structure in which extreme deference is paid to the teacher. There are cultural and historical reasons for this, and the teacher-disciple relationship has proved beneficial to many people. At the same time, however, extreme deference can lead to abuses of power. Sexual harassment is not the only kind of abuse that takes place, but it is a significant one that should be guarded against. In the ethnographic context I know best, female capoeiristas and their allies are starting to come forward to condemn individual mestres (masters) and other high-ranking individuals who have used their power to manipulate and violate students who should have been able to trust them. In response, some groups have started asking attendees at their events to sign codes of conduct. One teacher I know makes time at his events to have a large conversation with all participants about what it means to consent to a romantic or sexual encounter with a fellow capoeirista. These interventions are notable because they are not yet the norm, though in time they may be.

NEW HABITS TO KEEP

I do not want to engage in 'toxic positivity'. Over the last year and a half we've witnessed a staggering loss of life as well as economic devastation that was exponentially harder on vulnerable and marginalized populations than it was on those of us with more privilege. This, of course, includes many martial artists who make their living from teaching in-person classes and about whose survival we should be concerned. At the same time, however, there are some things we may not want to leave behind as the risk of COVID recedes. Capoeiristas might call these *jeitinhos*, which literally translates as 'little ways' but might also be thought of more colloquially as 'hacks' that people, particularly the disenfranchised, find to make life more livable. These are the things we might bring forward with us into a new post-COVID era.

Having my physical mobility restricted so severely during 2020 and much of 2021 helped me realize how much I value social connection. Many of us have benefited from the Martial Arts Studies podcast¹ that Paul Bowman started during this unprecedented period. I can only speak for myself but being isolated unexpectedly opened up a new world of connections for me. No longer able to casually chat with colleagues I happened to bump into on campus, my intellectual engagements with others became more intentional. Scheduling may have been a bit tricky at times, and on at least one occasion we mixed up our time zones, but I began interacting with people because of our shared interests rather than geographical coincidence. This is something that I would like to make part of my 'new normal'.

Being forced to work at home and conduct meetings via online platforms like Zoom has also opened a wealth of new possibilities for martial artists who cannot participate in face-to-face classes. In this issue, Vasiliki Kantzara and Martina Loos have shown that with some careful planning and modifications, students can achieve many of the same learning objectives they would be expected to master in person. Perhaps even more importantly, they have shown that moving instruction online during such fraught times is one way to provide continuity and care for those in our communities. Most of us are probably eager to resume our face-to-face interactions. In this issue, Martin Meyer, Andrea Molle, Benjamin Judkins, and Paul Bowman provide evidence of just how keen many martial artists are to return to face-to-face training, even if they had to push the boundaries of the law to do so. At the same time, however, we know there will be situations in the future that prevent people from training together. Hopefully, these situations will not be as extreme as what we have just experienced, but even in the best of times people do move away from their training groups and experience other interruptions. Hybrid learning environments – with some people together in an academy and

1 <https://martialartsstudies.podbean.com>

others training online – might allow for people who would otherwise stop training to continue. These online platforms also allow people to benefit from the knowledge of teachers in far off locations without having to expend the resources necessary to get there or take time away from work. While few among us would want virtual training to entirely supplant face-to-face training, intentional use of Zoom or similar platforms might allow for a more democratic exchange of ideas and skills between geographically distant peoples.

The extreme measures we have had to take in order to implement social distancing have made us reflect on what is truly essential. Are martial arts essential? To many of us, they are. They sustain us not only physically, but socially, emotionally, and sometimes even spiritually. And yet if martial arts instruction falls outside of the narrow definition of what is considered 'essential' by the state, many of those who make their living by teaching martial arts are thrust into a position of precarity. In my own community of practice, I witnessed several crowdsourcing efforts at raising money to help out-of-work capoeira teachers make ends meet. Some of these funds targeted teachers here in the U.S., but many focused on teachers in Brazil whose nation has been among the hardest hit by COVID-19. Even a moderate loss of income in some of Brazil's poorest regions is disastrous and will have long-term consequences. As scholars and practitioners, it is worth considering whether or not the sharing of wealth from globally privileged martial arts students with the teachers who remain in the arts' countries of origin, particularly if those countries occupy a more peripheral position in the world system, might become part of our new normal.

When we think about martial artists as being nodes in an interconnected global network, it is important to consider how information is exchanged between them, an issue that comes up both in David Sebastian Contreras Islas's article on Mexican capoeira and in Jürgen Schaflechner's piece on the globalization of krav maga. Travel is an important way through which martial artists acquire expertise and advance within their communities of practice. This may take the form of local travel, but it is often more far ranging. People travel to regional events or workshops at which international masters offer classes or preside over graduation ceremonies. Others go even further afield, visiting the source of a martial art in order to experience the local culture that gave rise to their art, to visit key sites in their art's myths, or to train at the feet of local masters. Lockdowns, travel bans, and social distancing guidelines that were put in place during the early stages of the pandemic put a temporary stop to these activities. People are beginning to travel more freely now, but the question is, should we? I don't think I would have the same appreciation of capoeiristas' swagger without having walked Bahia's steep cobblestone streets myself. At the same time, however, I am aware that unnecessary air travel contributes

to anthropogenic climate change. What is the cost of pursuing activity-based travel, and are we willing to bear those costs? In many martial traditions, practitioners are called upon to protect those who cannot protect themselves. In the contemporary era, that would seem to include people who live in vulnerable environments and whose lives and livelihoods will be affected by catastrophic weather events.

Finally, at risk of stating the obvious, the dangers of transmitting COVID-19 have ushered in an entirely new set of sanitation protocols. Those martial arts schools that were permitted to stay open had to meet high safety standards. Personally, I've never worried much about the cleanliness of the spaces in which I have trained. I suppose I took a bit of grime as part and parcel of doing martial arts or sport in general. However, the pandemic has revealed to me how this lackadaisical attitude in and of itself is something of a privilege. There is a certain degree of intimacy and personal contact that will always be part of what we do, and many of the sanitation routines followed during the worst of the pandemic might be hard to follow indefinitely, but it would be worth considering how some small changes might make our spaces more accessible to immunocompromised people.

Some of the issues I have discussed here are matters of practicality that are most pertinent to practitioners of martial arts. Other issues might be pursued as new research questions. As a relatively young field of academic inquiry, what has transpired over the last 18 months or so has the potential to profoundly affect who we are and how we approach our work. As martial artists, we are accustomed to facing challenges head on and we will continue doing so even if our adversaries are amorphous, abstract, and metaphorical.

OUR NEW NORMAL

Being given the opportunity to reflect on where we as a field stand vis-a-vis the current state of the world has been a true honor. I was delighted that Paul Bowman and Benjamin Judkins invited me to join the editorial team of *Martial Arts Studies* this spring. I also am pleased to announce that we are being joined by Wayne Wong as Assistant Editor who brings a wealth of experience, a keen eye, and a generous spirit to our work. As an anthropologist, my own work focuses on how martial arts function within contemporary society. And yet one of the great benefits of being part of an interdisciplinary group like this is seeing the different ways in which scholars from other fields approach the study of martial arts. It probably goes without saying that the past year and a half has been hard, but as I read the articles for this issue I was inspired by the tenacity of martial artists and of martial arts scholars and I look forward to seeing what the future has in store for us all.

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MARTIAL ARTS IN THE PANDEMIC

**MARTIN J. MEYER, ANDREA MOLLE,
BENJAMIN N. JUDKINS, & PAUL BOWMAN**

DOI

10.18573/mas.134

KEYWORDS

Covid-19, martial arts,
embodiment, online training,
Zoom

CITATION

Meyer, Martin J., Andrea Molle,
Benjamin N. Judkins, and Paul
Bowman. 2021. 'Martial Arts
in the Pandemic'. *Martial Arts
Studies* 11, 7-31.
doi: 10.18573/mas.134

ABSTRACT

This study examines the impact of the Covid-19 pandemic on martial arts training worldwide. A mixed-method online questionnaire consisting of 28 items was used as a survey instrument. 306 martial artists responded. These were mainly from the United Kingdom, the USA, Germany, Italy and Japan. The questionnaire focused on pragmatic adaptations of training volume, training rhythm, training location, training mode (individual or group) and training methods. The survey sought to gain insights into modifications that martial artists made as a result of the Covid-19 pandemic in relation to their training, curriculum, alternative fitness, strength and health activities, as well as training goals. The results suggest that the training restrictions implemented by governments in order to try to combat the pandemic transformed the practice of martial arts on a massive and fundamental scale. Specifically, they led to two seemingly opposing developments: increasing digitisation and an increased focus on the importance of embodiment. The article concludes with a suggestion that these lines of development will mould the post-pandemic landscape of martial arts.

INTRODUCTION

Wearing masks is a part of many martial arts and combat sports practices, such as lucha libre, pro wrestling, fencing, ninjutsu and kendo. In the infamous video game 'Mortal Kombat', characters like Scorpion, Sub-Zero, Kitana, Mileena, and Kabal wear elaborate masks, as do other protagonists in many kinds of martial arts media. However, when the COVID-19 pandemic cast a shadow on the entire globe in spring 2020, wearing such masks was not sufficient to withstand the successive crashing infectious waves. Civil and cultural life almost came to a complete stop as many governments imposed social restrictions in their efforts to battle the disease. This included much martial arts practice. To establish an understanding of the immediate effects on the martial arts, we developed an empirical study to target some key issues.¹

We anticipated that grappling practices might be more affected than some striking and weapons styles, as in most countries contact sports were restricted severely. Also, we expected to observe differences between martial arts which have established ways in which to train alone (for example, in solo forms, kata, patterns and *taolu*, or with training equipment such as punch bags), compared to practices that rely heavily on training partners (such as judo, wrestling or Brazilian jiu-jitsu (BJJ)). While government reactions to the pandemic around the world were often similar, in terms of shutting down martial arts training facilities and banning grouped sport practice, we expected the compliance levels of martial artists to differ, either nationally or perhaps according to style or level of personal or professional investment in the activity (for example, a hobbyist may be more compliant than someone whose livelihood depends upon it). We suspected that by having to adapt to state regulations, martial artists would modify their training curricula, methods, and practice goals. A key question was what the short-term and long-term effects of the pandemic on martial artists would be, and the ways in which future martial arts culture might be shaped by the pandemic and national responses to it.

METHODOLOGY

We developed and applied a mixed-method online survey, containing 28 items. Eight demographic items evaluated martial arts experience, country of residence, age, gender, income, living area, and martial arts occupation (whether instructor or not). The demographic items were separated into two blocks and placed as the first (3) and last (5) questions in the survey.

The core questions dealt with the influences of the pandemic restrictions on martial arts training. Most of them were split up into two items to evaluate the practice before and during the pandemic. Eleven items were constructed with a qualitative methodology which enabled open text answers. We used quantitative methodology for designing five-level Likert questions (3 items), single-choice (3 items) and multi-choice questions (4 items). All items could be skipped and/or had two escape options ('I don't want to answer this question' and 'I don't know').

We produced an English, Italian, German and Japanese version of the questionnaire (Table 1 opposite) and finalised the drafts via consultation with native speakers. The study design has been approved by the Ethics Committee of the University of Vechta to meet the requirements of the Declaration of Helsinki. The survey was conducted in February 2020, over 28 days. The participants were recruited via specific internet forums and social media. In addition, Martial Arts Studies scholars were specifically addressed via mailing lists. In total, 306 valid answer sheets were included in the evaluation. Partially answered sheets were also included when a specific quota of items was responded to.

The qualitative items were evaluated applying qualitative content analysis [Mayring 2004]. Consequently, the generated categories were reviewed by the research team and re-coded to enable quantitative analyses.

1 The idea for this study was born in a Martial Arts Studies Podcast conversation between Paul Bowman and Martin J. Meyer in Autumn 2020. The episode was released on 2nd November 2020, titled 'On Motivations, with Dr Martin Meyer, University of Vechta', and is available via all major podcast outlets: <https://martialartsstudies.podbean.com/e/on-motivations-with-dr-martin-meyer-university-of-vechta/>. It is also available as a video on the Martial Arts Studies YouTube Channel: <https://www.youtube.com/watch?v=iybpfwbVmY8>

	Question text	Options	Question mode
1	How many years have you practised martial arts in your life?	Years: _____ I don't want to answer this question I don't know	Single-Choice
2	Are you a martial arts instructor?	Yes No I don't want to answer this question	Single-Choice
3	What is the total number of martial arts you have ever practised?	Number: _____ I don't want to answer this question I don't know	Single-Choice
4	Has your government's response to the Covid-19 pandemic affected and/or restricted your training and especially martial arts training?		Open
5	Before restrictions were introduced because of the pandemic, which martial art(s) did you train and which was your main martial art?		Open
6	During the pandemic restrictions, which martial art(s) do you train and which is your main martial art?		Open
7	Did your interest in other martial arts change during the pandemic restrictions?		Open
8	Before the pandemic restrictions, did you substitute or enhance your martial arts training with other sports or training routines?		Open
9	During the pandemic restrictions, do you substitute or enhance your martial arts training with other sports or training routines?		Open
10	Before the pandemic restrictions, where did you practice martial arts?	At my own home, inside At my own home, outside (garden, lawn etc.) At someone else's home, inside At someone else's home, outside (garden, lawn etc.) Public club or dojo, inside Public location, outside Private club or dojo, inside Private location, outside Secret location Other: _____ I don't want to answer this question I don't know	Multi-Choice

Table 1:
Questionnaire
(English version)

	Question text	Options	Question mode
11	During the pandemic restrictions, where do you practice martial arts?	At my own home, inside At my own home, outside (garden, lawn etc.) At someone else's home, inside At someone else's home, outside (garden, lawn etc.) Public club or dojo, inside Public location, outside Private club or dojo, inside Private location, outside Secret location Other: _____ I don't want to answer this question I don't know	Multi-Choice
12	Before the pandemic restrictions, what was/were your preferred martial arts practice mode(s)?	Single training Group training Live online courses Recorded online courses Other: _____ I don't want to answer this question I don't know	Multi-Choice
13	During the pandemic restrictions, what is/are your preferred martial arts practice mode(s)?	Single training Group training Live online courses Recorded online courses Other: _____ I don't want to answer this question I don't know	Multi-Choice
14	Before the pandemic restrictions, how often did you practice martial arts weekly on average?	Once Twice Three to four times Five to six times Daily Several times a day I don't want to answer this question I don't know	Single-Choice
15	During the pandemic restrictions, how often do you practice martial arts weekly on average?	Once Twice Three to four times Five to six times Daily Several times a day I don't want to answer this question I don't know	Single-Choice

	Question text	Options	Question mode
16	Has the total amount of time you spend practising martial arts increased or decreased since the start of the pandemic restrictions?	Decreased greatly Decreased slightly Stayed the same Increased slightly Increased greatly I don't want to answer this question I don't know	Likert
17	Has your martial arts practice curriculum changed during the pandemic restrictions?		Open
18	Have your martial arts practice methods changed during the pandemic restrictions?		Open
19	Have your martial arts practice goals changed during the pandemic restrictions?		Open
20	After the pandemic has passed, do you think you will return to your former training regimen or will you continue to train as you have done during the period of restrictions?		Open
21	What do you think are the long-term effects of the pandemic and its training restrictions regarding your martial arts practice?		Open
22	During the restrictions (e.g., lockdown), have you taken part in martial arts practice sessions that are or were banned at the time?	Never Rarely Sometimes Often Regularly I don't want to answer this question I don't know	Likert
23	During lockdown or restrictions, have you taken part in martial arts competitions or tournaments that are or were banned at the time?	Never Rarely Sometimes Often Regularly I don't want to answer this question I don't know	Likert
24	In which country do you live?		Open
25	What is your gender?	Female Male Non-binary I don't want to answer this question	Single-Choice
26	What is your year of birth?	Year of birth: _____ I don't want to answer this question	Single-Choice

	Question text	Options	Question mode
27	In which kind of area do you live?	A big city The suburbs or outskirts of a big city A town or a small city A country village A farm or home in the countryside I don't want to answer this question I don't know	Single-Choice
28	What is your household's total income, after tax and compulsory deductions, from all sources? If you don't know the exact figure, please give an estimate. Use the income that you know best: weekly, monthly or annual. Please add your currency (symbol or chars).	Weekly: _____ Monthly: _____ Annual: _____ I don't want to answer this question I don't know	Single-Choice

Figure 1: Countries of residence of respondents

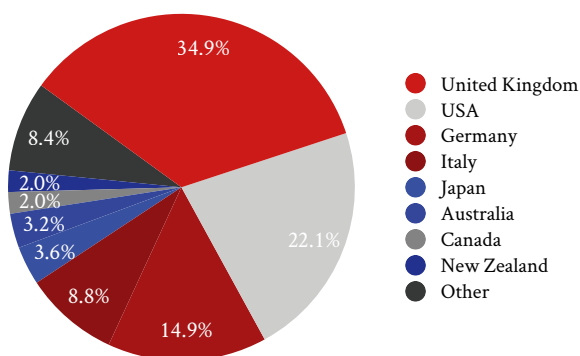
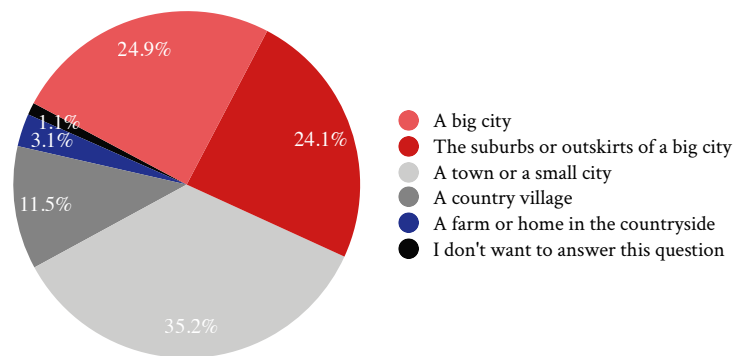


Figure 2: Living areas of respondents



DEMOGRAPHICS

Of the valid questionnaires, 235 were completed in English, 44 in German, 26 in Italian and one in Japanese. 86 % (n=222) of the respondents were male and 14 % (n=35) female.²

The average age of the participants was 47.7 years (SD = 12.03; MIN = 15; MAX = 79). More than half of the participants described themselves as instructors (54 %, n=166). Due to the limited language versions, a huge share of the participants resided in Western countries or were native Westerners living abroad. See Figure 1: Countries of residence of respondents (opposite).

Figure 2 (opposite) shows that nearly half of the participants lived in urban or suburban areas.

Maybe due to the high number of martial arts professionals, i.e. instructors, many participants stated that they had training experience in multiple styles with an average of >3.85 styles. See Table 2: Martial arts experience (right) and Figure 3: Martial arts styles experience (right).

Accordingly, the overall temporal martial arts experience turned out to be higher than expected, but nevertheless sufficiently diverse.

RESULTS

Impact of governmental restrictions on martial arts training practice

95 % of the participants stated that their government's responses to the Covid-19 pandemic affected and/or restricted their (martial arts) training. In most cases, public training locations closed down, contact training was prohibited, training areas regularly had to be disinfected and practitioners had to rely on solo training, sometimes enhanced with virtual lessons using Zoom, Skype or comparable applications. Whenever possible, people attempted to train in parks. The following quotes are representative of many participants' stories.

In 2020 I couldn't really go to any classes from March to October. Classes were suspended again around the first week of December. From October to December classes were supposed to be practising socially distanced training. Some clubs were better at this than others (and some clubs

² Missing or escape answers are not included in this ratio, nor in the following.

Figure 3: Martial arts styles experience

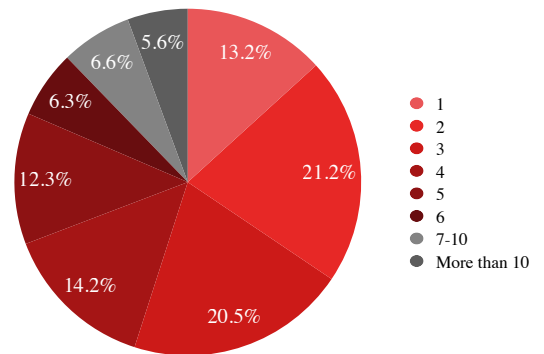


Table 2: Martial arts experience

Martial arts experience	Participants	
<= 5 years	24	8 %
<= 10 years	43	14 %
<= 15 years	42	14 %
<= 20 years	48	16 %
<= 25 years	31	10 %
<= 30 years	38	12 %
<= 35 years	22	7 %
<= 40 years	22	7 %
<= 45 years	15	5 %
More than 45 years	21	7 %

ignored those guidelines entirely). From May to November I went to a nearby park and practised some solo weapons drills. This did wonders for my mental health but practising without any feedback has meant I've developed some bad habits, and I've also noticed my posture is becoming poorer. It's also a bit mentally draining to try and practice on your own all the time. Generally I've been very lonely. I've not had much opportunity to train over the winter months. It's rained so much that if I do train I just slip in the mud and tear the grass to shreds.

My country had an initial moment of total lockdown until May 2020, and this completely stopped our dojo training. Personally, my practice was restructured around physical preparation and solo drills. After the summer, gym activities resumed but with rather tight limitations regarding spacing, albeit with exceptions for activities with predominant contact but under contact tracking conditions. In the training of my main activity, it was decided to totally limit sparring or exercises in pairs between participants. In the practice of another martial art whose classes I attended, contact was maintained, being extremely predominant, although limiting the time devoted to it during training, adding preparatory exercises or two-person exercises with the help of objects (belts, elastic bands, balls) to decrease the potential for contagion. With the wave of infections in mid-November, activities stopped again, except for those dedicated to competitive athletes. At the moment, training continues in online mode, and naturally still focuses on physical preparation (limited, as the surface available to many participants is very small), technique and drills.³

Whenever possible, participants converted their home into private dojos ('I've been able to practice with my 14-year-old child at home by buying home mats'. 'I have a garage and my son is a shoran [sic]

3 'Il mio paese ha avuto un iniziale momento di lockdown totale fino a maggio 2020, e questo ha bloccato completamente gli allenamenti del nostro dojo. Personalmente, la mia pratica si è ristrutturata attorno a preparazione fisica e drills a solo. Dopo l'estate le attività delle palestre sono riprese ma con limitazioni piuttosto strette riguardo al distanziamento, pur con eccezioni per le attività con contatto preponderante ma in condizioni di tracciamento dei contatti. Negli allenamenti della mia attività principale si è scelto di limitare totalmente lo sparring o esercizi a coppie tra i partecipanti. Nella pratica di un'altra arte marziale di cui frequentavo le lezioni il contatto si è mantenuto, essendo estremamente preponderante, seppur limitandone il tempo dedicato durante gli allenamenti, aggiungendo esercizi propedeutici oppure a due persone con l'ausilio di oggetti (cinture, elastici, palle) per diminuire il potenziale di contagio. Con l'ondata di contagi a metà novembre, le attività si sono fermate di nuovo, salvo quelle dedicate ad atleti agonisti. Al momento gli allenamenti continuano in modalità online, e naturalmente sono focalizzati ancora su preparazione fisica (limitata, visto che la superficie a disposizione di molti partecipanti è molto ristretta), tecnica e drills.'

in karate, so I can train and have a partner to train with'). However, participants reported that martial arts competitions, gradings and workshops and camps nearly all came to a standstill.

Inevitably, there were differences in government responses to the pandemic. For instance, Japan never imposed a strict lockdown, rather hedging training conditions:

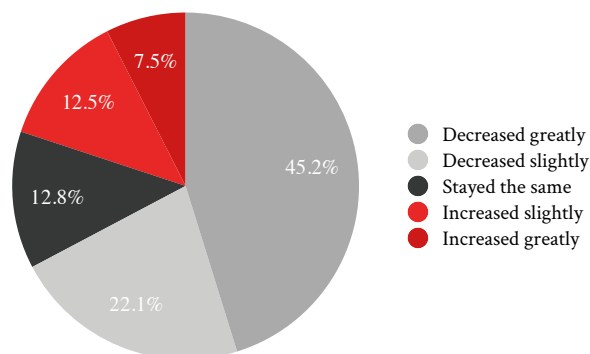
[The] 1st lockdown in Tōkyō prevented use of the community centre in which we reserve rooms for our dōjō's training. The second (current) 'lockdown' restricts use of community centres after 8pm. This reduced our 3 hour training to 2 hours. During training, we wear masks, increase ventilation, have hand sanitiser available, and participant names, body temperatures, and contact information is recorded and given to the community centre reception for traceability in the event of infection. Also, we are unable to train at the headquarters dōjō in Okinawa.

Meanwhile, several prudent states like New Zealand managed to re-open sport facilities without limitations, albeit only by imposing strict limits on international travel.

Changes in overall training time amount

It is not surprising that approximately two-thirds of the participants noticed a slight or great decrease in their overall training time. However, 7.5 % reported a greatly increased amount of time spent training, a fact which will be discussed later. See Figure 4: Changes in training time amount (opposite).

Figure 4 : Changes in training time amount



Changes in training location

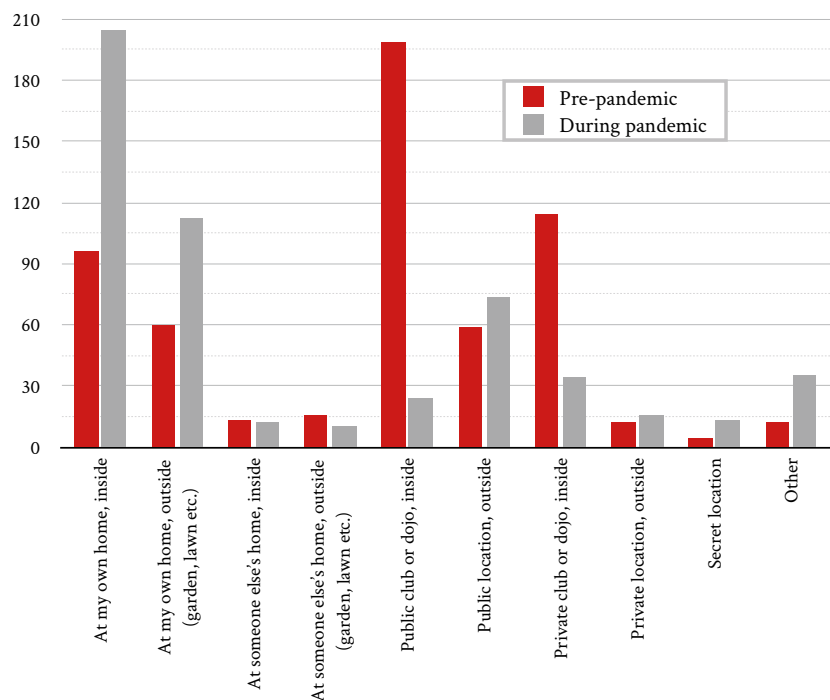
A strong reason for the reduction of training time was the governmental shutdown of training facilities like sports clubs and dojos. As figure 4 illustrates, the main training locations shifted greatly from public and private clubs to home exercise. See Figure 5: Changes of training locations (multiple answers possible) below.

In the category 'other', participants mostly listed university facilities and international seminars during the pre-pandemic times. Other training locations during the pandemic were mostly private built, homemade dojos and garages. Noticeable is the rise of secret training locations, which will be discussed below.

Changes of training rhythms

According to the lowering of overall training time, training rhythms were profoundly affected by the pandemic restrictions, in that participants tended to exercise less often. See Figure 6 (overleaf): Training rhythms before (left) and during (right) the pandemic.

Figure 5 : Changes of training locations (multiple answers possible)



Changes of training, substitutions and enhancements

Nearly two-thirds of the respondents already enhanced their martial arts training pre-pandemic with supplementary activities, such as weightlifting or bodyweight workouts, as well as stretching, fitness routines, other sports or other martial arts. Interestingly, during the pandemic these numbers actually rose, although there was less engagement in weightlifting and fitness practices that are difficult to do in times when gyms are closed and large, expensive or specialist equipment is required (e.g. respondents tended to focus on 'Mainly body weight and cardiovascular exercises like push-ups, air squats, sit-ups and burpees'; 'Weight training and resistance exercises in my swimming pool').

On the other hand, the uptake of other sports was significantly expanded, mostly in terms of easy to perform outdoor activities like walking, running, hiking, and cycling, as well as indoor activities like Pilates, qigong and yoga. ('I still augment my training with Bikram yoga, although the studio is closed and I have to heat up my bathroom with space heaters to get the same effect'.)

See Figure 7 (overleaf): Training substitutions and enhancements before (left) and during (right) the pandemic.

Figure 6:
 Training rhythms before (left) and during (right) the pandemic

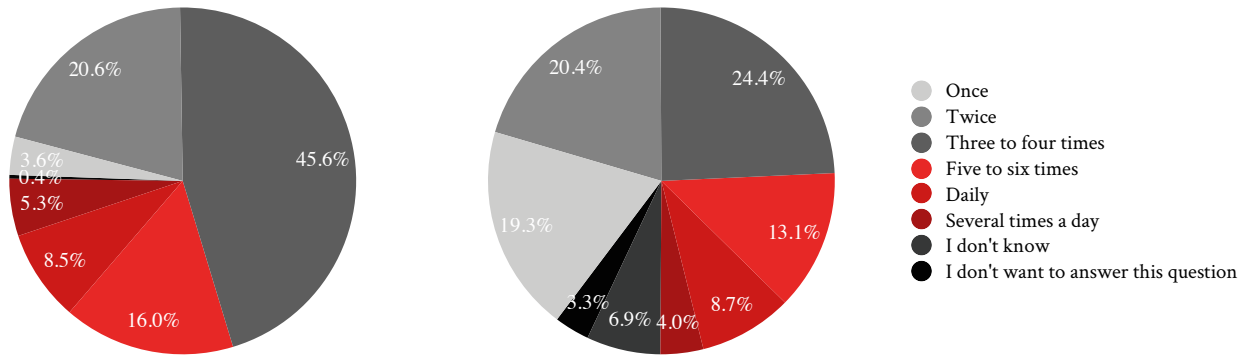


Figure 7:
 Training substitutions and enhancements before (left) and during (right) the pandemic

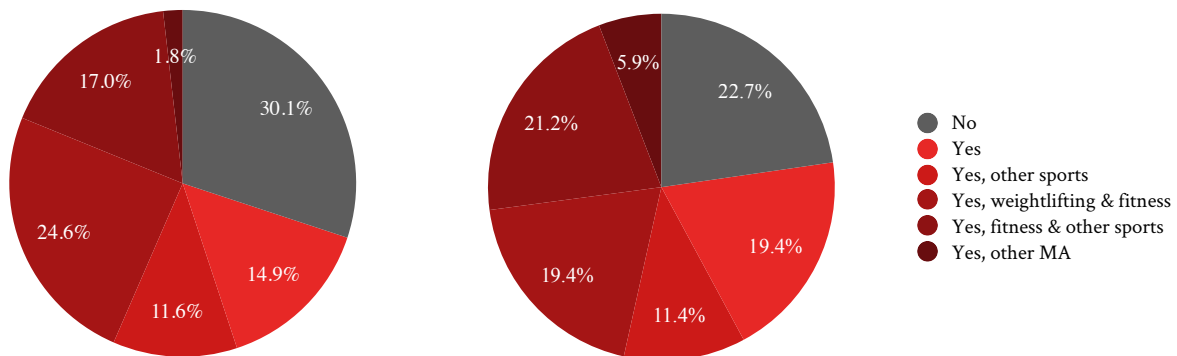
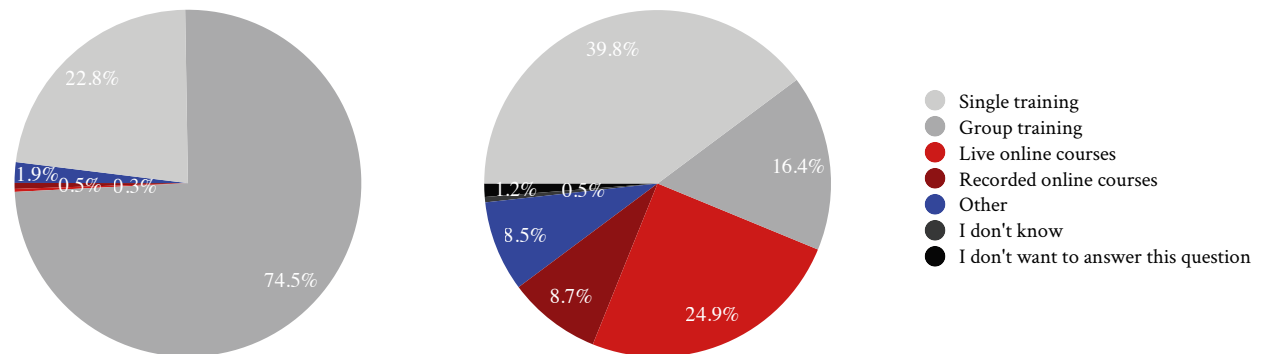


Figure 8:
 Preferred training practice models, before (left) and during (right) the pandemic



In online martial arts classes, instructors adapted their training to fit home practice, borrowing elements from other martial arts and implementing more fitness routines:

The pandemic has slightly increased the amount that my practice group pulls exercises from non-martial callisthenics and sometimes dance exercises. We have to focus on solo training now, much of which is footwork-oriented, so we get a bit less technical and do a bit more conditioning. We draw upon whatever foundational exercises seem useful. In addition, some members of my practice group are a little concerned about being too inactive, so they have more interest in conditioning with callisthenics.

Changes of preferred training models

One of the most striking changes in martial arts training took place in the preferred practice models. Obviously, the pandemic caused a huge decline in group training (from 74 % to 16 %), as well as an increase in solo training (from 23 % to 40 %) and a surge of live and recorded online courses (from 1 % to 34 %).

See Figure 8 (opposite): Preferred training practice models, before (left) and during (right) the pandemic.

In the 'other' category, participants noted 1-on-1-training (occasionally as instructor/student-training), during the pandemic especially with family members or friends.

For the few weeks I was able to practice in public with others we could still practice patterns [...] in socially distanced groups. I haven't attended Zoom classes because video calls make me anxious, but my understanding is that TKD Theory (ie, history of the art and Korean terminology) has been less emphasised, I think probably because the instructor is trying to make it as fun as possible to keep people coming back and most people don't like theory [...] Sparring has become completely impossible; my instructor has tried to do a sort of 'shadow sparring' thing, but honestly it's cringy and I was not comfortable engaging with it. As well as not being able to make contact, when there were public classes, only people training with family members were allowed to use kick shields (and they had to clean them before and after) [...].

Curriculum changes

In this context, at the formal, organisational and administrative level of clubs and associations, the 'inner structures' of curricula, methods and goals were altered as well. 84 % of the participants stated that they adapted their training curriculum due to the pandemic restrictions. See Figure 9 (overleaf): Changes in martial arts practice curriculum.

As expected, most participants had to forgo the practice of partner forms and 1-on-1 combat, like grappling, throwing and sparring. ('Before the pandemic we spent at least 60 % of our time or more on paired practice. During the pandemic we are spending 100 % of our time on solo practice – kata, drills, etc. – at a minimum of 6 feet distance. It is a massive change'. 'Yes, our self-defence routines were modified greatly'.)

Advanced combat interactions were reduced in favour of basic technique training and solo choreographies (such as kata, poomsae, and forms), in some instances giving much more importance to self-perception and body awareness.

Other martial arts are integrated, the focus is on exercises that can be done alone and that promote self-awareness, the training is no longer geared to the examination programme and is designed so that both beginners and advanced students can follow along, and new exercises are developed for training without a partner.⁴

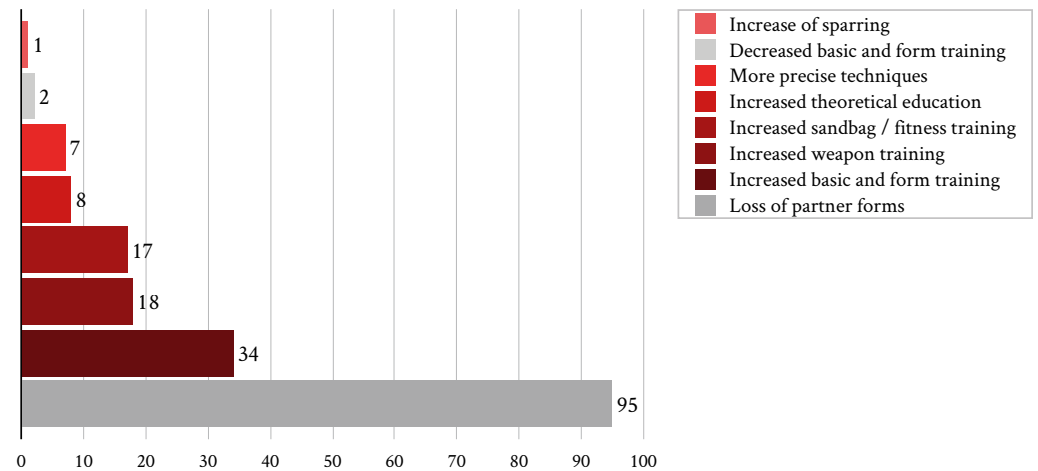
[...] the emphasis in the curriculum has completely changed to solo drills, a lot of focus on biomechanics (as much as possible without a second person to give tactile feedback on this), flow, timing, and distance.

Also, several practitioners of throwing/grappling martial arts switched to specific (niche) training fields, mostly single weapon training (especially aikido devotees). ('Yes, in aikido we do much more weapons work now and very little to no person on person technique'.)

Practitioners of striking martial arts replaced their training partners with sandbags and punching bags and/or implemented more fitness routines into their curriculum. ('More focus on solo training drills. Flow drills, weapon handling drills, bag work'.) Also interesting is the moderately increased awareness given to precision in technique execution. ('Greater emphasis in correct technique in patterns'.) This may reflect anxieties in times where the technical guidance and correction mechanisms of teachers and peers were missing. Answers to further items certainly showed that people were worried about losing their technical skill or picking up 'bad habits' (as the following quote illustrates: 'Focused on single form training, trying not to build bad habits from the lack of an instructor and partner').

4 'Ja. Es werden andere KuK integriert, der Fokus liegt auf Übungen, die man allein durchführen kann, und die die Selbstwahrnehmung fördern, das Training ist nicht mehr auf das Prüfungsprogramm ausgerichtet und so gestaltet, dass sowohl Anfänger als auch Fortgeschrittene mitkommen und es werden neue Übungen für das Training ohne Partner entwickelt'.

Figure 9:
Changes in martial arts practice
curriculum



But the drive for precision also had rather pragmatic implications, as practitioners had to be careful executing techniques in confined home spaces ('Confined spaces of some students homes obliges a change in the practice curriculum and favours practising to improve flexibility, balance and precision of movements. The philosophy is that: Slow is fast').

Also remarkable is that several instructors extended their online courses with theoretical lectures and discussions, sometimes arranged as therapeutic open talk concerning living and training in the pandemic ('Completely changed from physical activity to theoretical discussions based on historical treatises'). Similarly, some individuals used their time at home to delve into martial arts books and media to broaden their general martial arts knowledge or to act as a surrogate to personal training guidance.

Karate training has shifted online, and our instructors have shifted emphasis to technical aspects of the art normally left for much higher grades (e.g. deeper interpretation of kata, weapon work etc.), and we have had to rely on visualisation where sparring/kata application would normally be trained.

*I had the time to memorise the teaching books, which are considered to be the bible. If it is because of this time at Corona that I was able to work on it, it is also because of Corona!*⁵

Instructors themselves occasionally revisited their teaching curriculum – often to make it suitable for online instruction – but sometimes also to give it a general overhaul.

[My martial arts practice curriculum changed] but not due to the pandemic, mainly because I had time to consider improvement to our syllabus.

Moving to an entirely online delivery platform has significantly changed what aspects of the curriculum can be covered.

[...] lots of adaptations for live online sessions.

Methodical changes

More than half of the study participants did not answer this item, far more than in the case of nearly every other item (except the following one). We suspect that the intention of the research question was not transparent enough or there just were no method adaptations to report. Besides the obvious increase in online training, several participants stated that they adapted their methods to be practical in confined home spaces. Whirling around long-range weapons was a constant threat to household integrity.

Yes, due to the respective regulations/restrictions, the training had to be conducted in a different form (solo) with different methods (online training, WhatsApp coaching, video analysis) and with a different focus (movement mechanics, building up conditional attributes).⁶

Training has moved online with four half-hour sessions with specific belts (red belts, black belts etc.) versus two 1-hour training sessions with a mixed ability class a week. All theory material was consolidated on a central portal for the school including recordings of patterns, line work and set sparring.

5 「バイブルとされる教本を覚える時間を持ってました。コロナのこの時期だからこそ取り組めたとすれば、コロナのおかげでもあります」

6 'Ja, durch die jeweiligen Verordnungen / Beschränkungen musste das Training in anderer Form (Solo) mit anderen Methoden (Online-Training, WhatsApp-Coaching, Videoanalyse) und mit anderen Schwerpunkten (Bewegungsmechanik, Aufbau konditioneller Attribute) durchgeführt werden.'

Practice goal changes

Here also, 160 participants did not answer the question, maybe for the same reasons as mentioned above. A further 104 participants stated that their goals had not changed, in some instances emphasising that goals only have been delayed or that the route has been altered.

No [changes]! Menkyo kaiden or die tryin'!

No [changes]. Goal is still to improve skills and understanding, the pandemic is just forcing a different route of getting there and an emphasis on different aspects for a while.

We decided not to use the psychological term ‘motive’, instead relying on the term ‘goal’ in the survey question, as participants might not have an exact concept of motives or motivations [Bowman 2020; Meyer and Bittmann 2018]. Also, the term ‘motive’ turned out to be difficult to translate into further questionnaire versions, altering the semantic meaning significantly (especially in Japanese). The term ‘goal’ has its shortcomings, too, as it supports some kind of final purpose unlike the more directionless ‘motive’ which better can be used to describe emotional state-related motives like fun, flow, and thrill. See Figure 10 (below): Changes in martial arts practice goals.

Overall, the participants’ statements illustrate that for most of them, the pandemic restrictions seriously interrupted the continuity of their martial arts training progress. We recognised three basic compensation types.

The first type is characterised by a stagnation in martial arts training, expressed by having no goals at the moment (7 mentions) or lower motivation to train (6 mentions).

[...] I have suspended any thought of goals.

Yes, the restrictions mean that I'm starting to have problems keeping motivated. You have no perspective.⁷

Due to lack of access to tools and stress from the pandemic I lack motivation and often merely go through the motions of training, without feeling the joy and silence I usually do.

The second type is characterised by trying to maintain skill-level (21 mentions), keeping fit (13 mentions) or sticking to the regular training routine (4 mentions).

Instead of naturally progressing I focused on repeating previously done routines and drills.

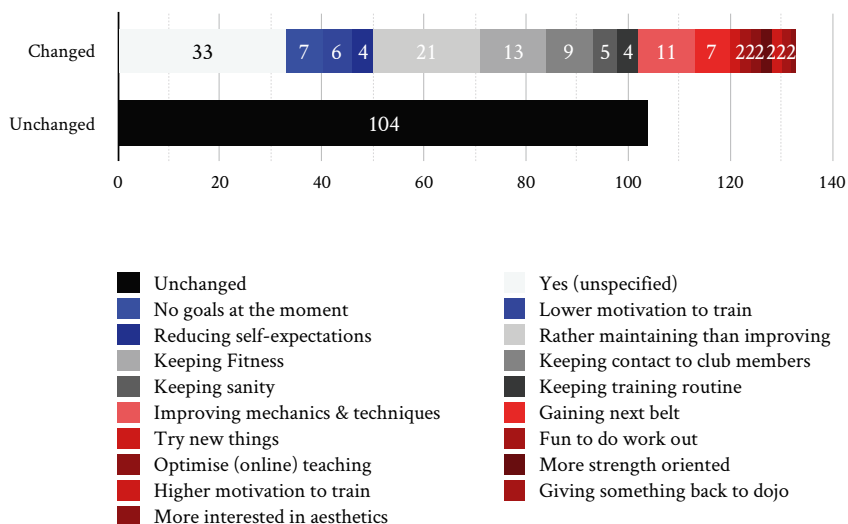
Only that I must focus more on maintaining than improving.

This goes along with the insight that the self-expectations related to training and skill progress had to be reduced for the time of the pandemic. Many participants’ comments suggested that they were filling this hiatus in their martial arts career with self-reflection and a re-assessment of the importance, goals and position of martial arts in their own lives. This self-reflection often seemed to be related to the sudden removal of competitions and gradings, which suspended common performance motives.

Yes, a lack of competition available has changed the way I set goals and train martial arts.

⁷ ‘Ja, die Verbote bewirken, dass ich so langsam Probleme habe meine Motivation zu halten. Man hat ja keine Perspektive.’

Figure 10:
Changes in martial arts
practice goals



I'm still determined to get my black stripe but accepting this may take longer. I'm desperate to compete again ... it's been a year now since last competition.

This view affected also the aspiration level of the general curriculum:

The curriculum per se has not changed but the expected expertise levels have been possibly adjusted to recognise the impairment in training and tuition.

Also, participants affirmed that they tried to keep contact with other club members (9 mentions) and wanted to give something back to the club in hard times (2 mentions).

We're mainly fighting to maintain interest and social cohesion so that there is a group of students to return to classes when we can have in-person classes again.

I am also wanting to give back to my club as their continuing training has helped me and my son so much. I want to help out in any way I can.

Also mentioned is the aim of keeping 'sane' (5 mentions). In this, we find an important clue about the importance of martial arts practice for mental health and wellbeing. This might be interpreted either as a long-time 'outcome' (or unexpected 'by-product' of earlier 'motives'), one that gained more relevance during the pandemic; or it might be interpreted as a new dimension that emerged as a coping strategy to help withstand the unique burdens the pandemic laid upon practitioners – such as general anxiety, fear of job loss, pessimism about future life, and the lack of social and physical interactions.

I used to train to stay fit and socialise. Now I train to stay sane.

My general goal is just to stay in shape and stay sane during the pandemic. I really can't progress in aikido without contact-based practice.

I have advised several practitioners on methods to maintain an adequate level of physical fitness but above all I have called upon the aikido practitioner's capacity for adaptation and resilience and urged them to use it to deal with the psychological problems caused by the pandemic, which are sometimes more serious than the material ones.⁸

8 'Ho consigliato diversi praticanti riguardo ai metodi per mantenere un livello adeguato di preparazione fisica ma soprattutto richiamato la capacità di adattamento e resistenza del praticante di aikido invitando a utilizzarla per affrontare i problemi psicologici causati dalla pandemia, a volte più gravi di quelli materiali.'

The third type is characterised by regarding the pandemic rather as an opportunity to improve and revise martial arts techniques and mechanics (11 mentions); to prepare for belt gradings (7 mentions); to try new things (2 mentions); or to shift attention to specific martial arts features like strength (2 mentions) or aesthetics (1 mention).

Probably become more focused. It's given me time to study techniques and videos in more depth.

Yes, I am more focused on improving technique rather than learning new forms.

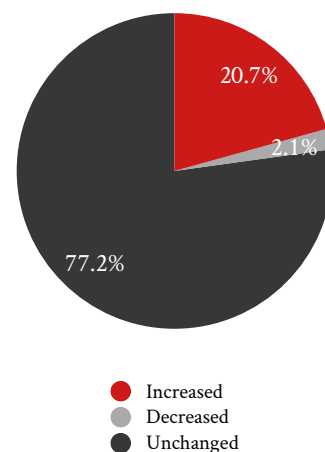
Because of the time savings (no travel time to dojos) and access to better teachers, I'm endeavouring to train more often.

Two instructors stated that they were more motivated to review and optimise their teaching style.

Changes in inter-style martial arts interest

It is interesting to see how loyal participants were to the martial arts. However, it must be acknowledged again that a huge proportion of the sample have a professional relationship with martial arts, being martial arts instructors and therefore more likely to stick with them. Only 2 % admitted waning motivation in martial arts overall, mostly citing increased obligations and the impossibility of practically continuing training.⁹ More than three quarters of the survey declared no change of interest in martial arts (Figure 11 below).

Figure 11:
Changes in (inter-style)
martial arts interest



9 'The pandemic restrictions have made it difficult to still be motivated to train martial arts.'

The growth of interest in other martial arts, which 21 % reported, stems in many ways from various adaptational effects, as mentioned above. Certainly, boxing, kickboxing and MMA gained more interest. This is because:

a. other contact martial arts were more difficult to practice. (*I started to look at striking arts that could largely be non-contact*.)

b. the absence of training partners led participants to adapt their practice by using equipment like punching bags and limited space training drills.

I focused more on boxing and kickboxing since I purchased a punching bag to occupy myself.

Yeah, picked up a lot of tips from boxing regarding rope skipping.¹⁰

I started to become more interested in different disciplines such as Western boxing and jiu jitsu. I have started developing my boxing skills as punches are limited in taekwondo and it has no ground work so I intend to start doing jiu jitsu when covid restrictions are lifted to make me a more rounded martial artist.

c. huge pay-per-view organisations representing these martial arts were the few that decided to continue competitions and therefore secured their visibility, such as UFC, Bellator, Top Rank, PBC, WWE, AEW and Golden Boy.¹¹ Interestingly, while these outlets also had far fewer events, there is evidence to suggest that they expanded their audience to some who had only ever had a limited interest in these martial arts pre-pandemic.

[...] the UFC mixed martial arts organisation was the only one still running.

This accompanies a general increased interest in online resources, especially YouTube, which we interpret as a concomitant to the surge in Zoom classes.

You could say that in the sense that I have a lot of free time and I get to watch videos on YouTube. I've been getting more and more into boxing and MMA techniques.

10 'Ja, habe viele Tipps von Boxen abgeschaut, was Seilspringen angeht'

11 See: https://www.espn.com/mma/story/_/id/30056977/how-combat-sports-pipeline-broke-2020. Last accessed 10th June 2021

Naturally, video streams were an important surrogate for or supplement to regular group training. But in fact the relevance of online and offline resources has exceeded this by far. Many participants used their enforced extra time at home to enhance their martial arts knowledge and deepen their inter-stylistic understanding besides ordinary online classes, as the following statements demonstrate.

In the time since the pandemic started I've been listening to martial arts podcasts and reading academic work on martial arts practice. I was interested in trying other arts in the past, but due to the podcasts and reading I'm even more inspired to branch out and try other systems at some point.

I can't train but watch YouTube for techniques I can't practice. I'm interested vicariously in more arts. I watch more technical videos but don't train. I'm a tourist.

I have had more time for researching karate kata techniques, which includes cross referencing similar techniques in other martial arts.

Compliance with governmental restrictions

In the public discourse, and especially in the martial arts community, engagement in martial arts practice is often presented as supporting moral and social behaviour – at the very least, towards training partners, competition opponents, but also, often, in relation to many other aspects of social and interpersonal life. It would be an oversimplification to measure these high standards solely according to adherence to governmental, legislative instructions, but if martial artists truly obey strict philosophical-moral ideals, one might expect a significantly altruistic adherence to socially responsible rules in relation to the pandemic.

Looking at the five most represented countries in the study survey, the severity, strictness and level of enforcement of restrictions concerning martial arts practice is obviously very heterogeneous. Similarly, in different countries, people's compliance with government institutions and law differs widely too. Nevertheless, we were surprised that in these five states, nearly one-fifth of the study participants acknowledged that they had participated in training sessions that were legally banned at that time. On the other hand, only two participants in the entire study admitted participating sometimes or regularly in banned competitions (Table 3 overleaf).

Due to the methodological limitations of the study (see below), regarding predominantly the survey size and translanguistic inconsistencies, an international comparison between compliance levels of martial artists must be met with caution.

Although figure 12 (opposite) shows that martial artists in Japan engaged more often in banned practice sessions in reference to the four other states, in fact most of the study participants living in Japan seem to be foreigners, as only one questionnaire was filled out in Japanese.¹²

It has to be mentioned, too, that the Japanese government did not enact any restrictions which affected martial arts practice, rather it *advised* its citizens to respect public health rules.

[...] the government in Japan never specifically closed dojos, sometimes they would 'ask' gyms and stuff have restricted opening times but we were never told 'not to train' and as much as I love teaching and want to train I decided to halt training for my own and my students' peace of mind.

A male US citizen, who was not an instructor, marked an exception, freely admitting that the pandemic did not affect or restrict his martial arts training:

When our gym was closed we practised in secret at people's houses.

¹² Also, the statements of these participants concerning other items indicate this conclusion

By contrast, several participants stated that:

- a. their gym closed even before governmental actions took place.

The government placed restrictions on martial arts schools, but these didn't affect us because our school's policies were more cautious/protective than the regulations. We have been closed since March 2020. [US, male]

I voluntarily suspended my training in BJJ and Muay Thai for my health and the safety of my household. I stopped before my state imposed restrictions. [US, male]

- b. they would have restricted training themselves if no official sanctions were launched:

However, I would have interacted very much less with other people even if the government had not placed restrictions. [UK, male]

There have been regulatory limits on in-person training. However, even in the absence of such regulations, I would not have conducted in-person classes. [South Africa, male]

- c. or their own training restrictions were even more strict than governmental guidelines:

Table 3 :
Participation in banned training sessions and competitions

Participation in banned training sessions		... competition	
Never	197	64,4 %	255	83,3 %
Rarely	20	6,5 %	0	0,0 %
Sometimes	16	5,2 %	1	0,3 %
Often	5	1,6 %	0	0,0 %
Regularly	10	3,3 %	1	0,3 %
I don't want to answer this question	6	2,0 %	2	0,7 %
I don't know	7	2,3 %	2	0,7 %
No answer	45	14,7 %	45	14,7 %
	306	100,0 %	306	100 %

Technically my government has affected my training, but not in practice. For ethical reasons, I have voluntarily restricted myself more than my government has. [US, male]

We closed the courses, and when we were given the opportunity to resume we did so on a non-contact and quota basis, i.e. with a reduced number of people.¹³ [Italy, male]

Changes in martial arts styles trained

Perhaps the most fascinating question in our study related to which specific martial arts were more likely to be trained less or more as a result of pandemic restrictions and if these shifts were temporary.

It must be pointed out, that the study survey was not representative in any way. Several martial arts were more covered by the participants than other, the foremost being aikido, taekwondo, karate, BJJ, MMA, jujutsu and historical European martial arts (HEMA). Also, many participants were martial arts instructors with a common knowledge of various martial arts styles, who were hence capable of switching between them as befitted the circumstances (see figure 3).

13 'Abbiamo chiuso i corsi, e quando ci è stata data la possibilità di riprendere l'abbiamo fatto senza contatto e contingentato, cioè con un numero ridotto di persone.'

As expected, the practice of grappling styles such as aikido, jujutsu, judo, BJJ, MMA, hapkido and wrestling declined significantly. In direct comparison, standing sports such as taekwondo, karate, kickboxing, boxing and wing chun experienced a smaller loss in terms of practice. Inexplicable exceptions are Muay Thai and krav maga. Weapons-based martial arts such as HEMA, kenjutsu, fencing, kendo and jodo also suffered comparatively little loss, or even gained in practice. However, the hybrid weapons- and close-contact styles of Filipino martial arts also record losses in terms of training. Strikingly, in contrast to all other martial arts, practice in iaido grew significantly, as has the related practice of koryu bujutsu. Probably due to its strong basis in solo forms, taiji also suffered comparatively low levels of loss.

Long-term effects on individual martial arts practice

The majority (two thirds) of the participants stated that they expect to resume their pre-pandemic training arrangements when restrictions are lifted. Of the remaining third, 25 participants said that they would also try to incorporate parts of their new pandemic training routine once the restrictions were lifted.

I intended to return to the previous regimen, and supplement it with additional training established during the period of restrictions.

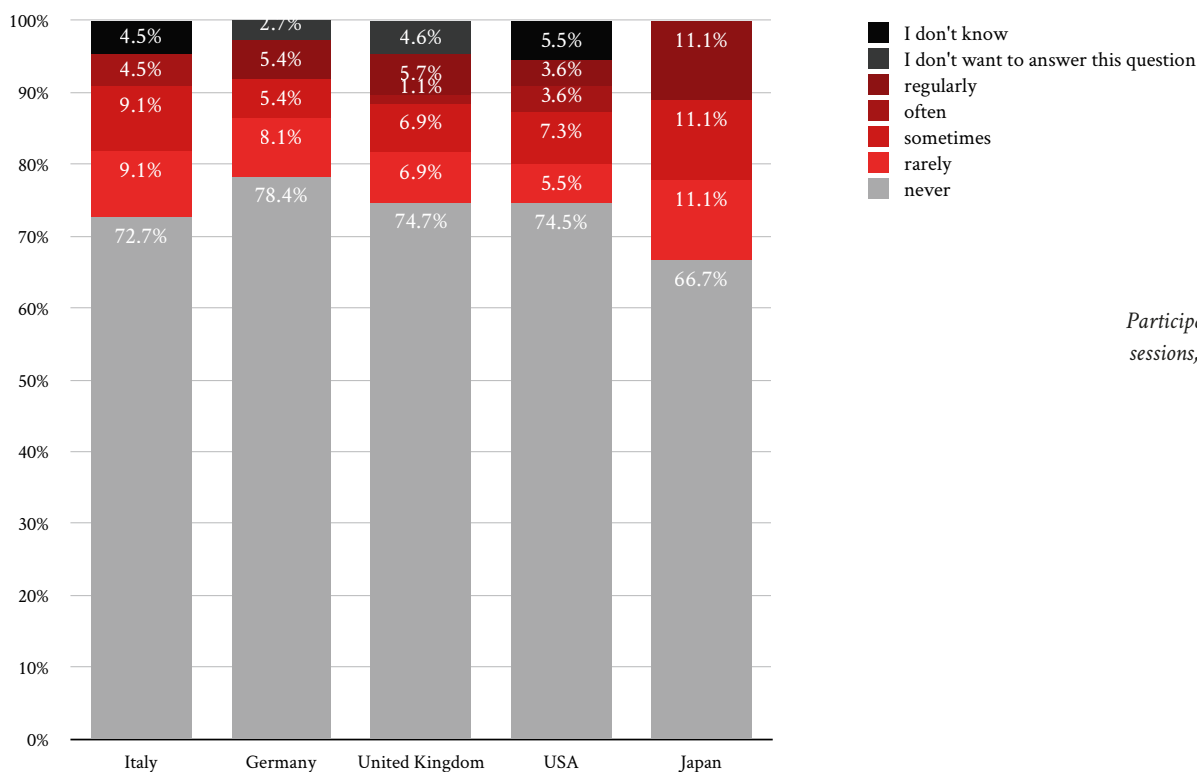


Figure 12.:
Participation in banned training sessions, distinguished by nation

We'll return to the former training regimen, but probably incorporate some aspects we've been working on during the pandemic where we've found them effective for addressing aspects of the training.

Maybe a mixture. More supplementation of the regular training in the gym by autonomous work externally, but generally as before (if the gym still exists).¹⁶

Others (19) commented that they would like to keep online training sessions, also in a hybrid format.

One participant explicitly declared that they intended to continue outdoor training:

Some services, such as online seminars and online training across borders would also be a nice addition after the pandemic.¹⁴

Solo training in the park will continue (positive effect of the pandemic), but eventually together with fellow students.¹⁷

I think I will continue to offer online training, and change my schedule to include online classes, and hybrid classes where some participants may be online.

Twelve participants announced that they intend to increase their overall training amount, and that they will do so by combining both pandemic and pre-pandemic practices:

There is also a trend to keep formats of single (home) training (15 mentions).

Only train more often. What we have now is better than it was.

I will return mainly to group lessons but personal practice will remain increased.¹⁵

Interestingly, six participants intended to switch to a different martial art.

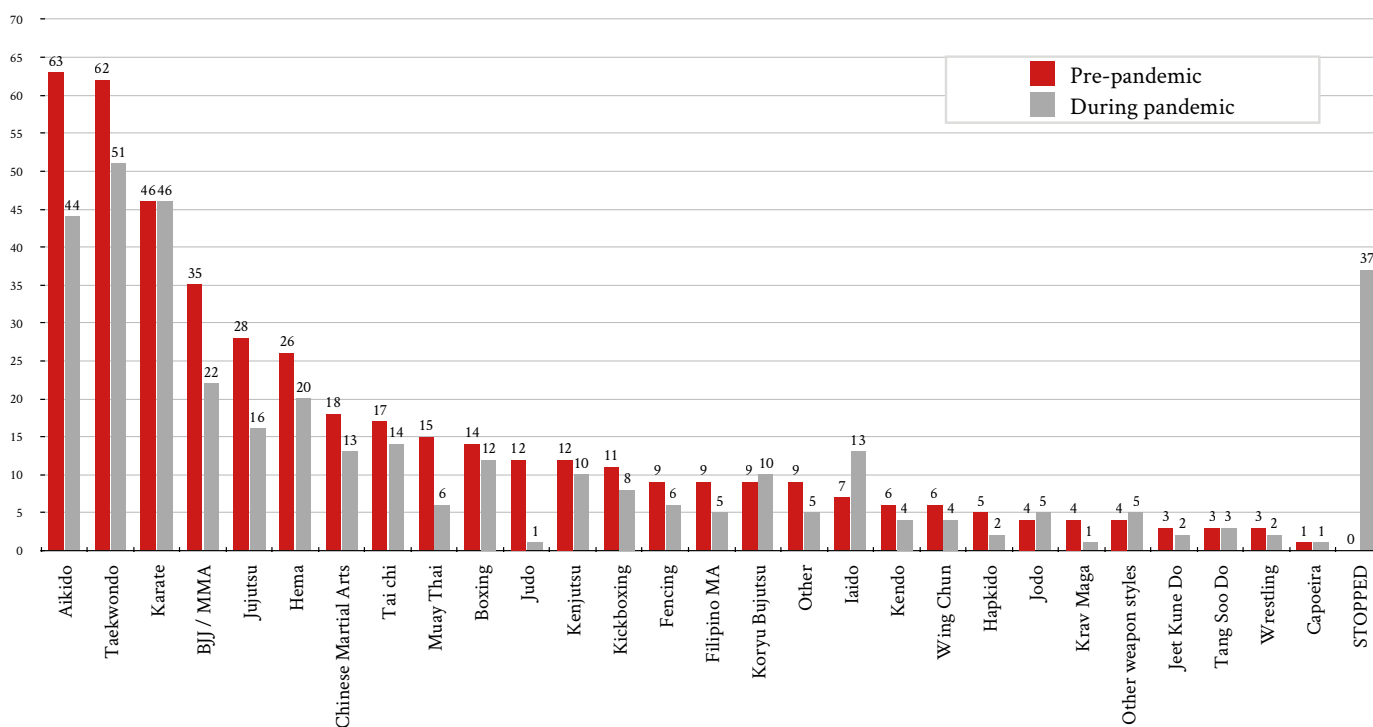
14 'Einige Angebote, wie Online-Seminare und Online-Training über Grenzen hinweg wären auch nach der Pandemie eine schöne Ergänzung.'

16 'Vielleicht eine Mischung. Mehr Ergänzung des regulären Trainings im Gym durch die eigenständige Arbeit außerhalb aber generell eher wie vorher (wenn es das Gym dann noch gibt).'

15 'Ritornereò principalmente a lezioni di gruppo ma la pratica personale rimarrà incrementata.'

17 'Einzeltraining im Park wird bleiben (positiver Effekt der Pandemie), eventuell aber gemeinsam mit Trainingkolleg*innen.'

Figure 13:
Changes in practised styles during restrictions



I'll return, though not to kickboxing, just to BJJ and perhaps switch to another art alongside it like judo or wrestling.

Another three respondents believed that the long-term pandemic effects will prevent them recurring to pre-pandemic martial arts practice.

I expect everything is changed forever.

I don't believe it'll pass, with this government. We'll be in cycles of 2m distancing and lockdown for years, so there's no point thinking of returning.

Long-term effects on martial arts culture

Here also, one third of the study participants preferred not to answer the question. A minority (24 mentions) believed that there will be no long-term effects on post-pandemic martial arts culture at all.

Nothing that can't be fixed

What doesn't kill me makes me stronger.

A further 21 respondents anticipated unspecified general changes. However, the majority of the survey was pessimistic to say the least.

And pardon me if I sound pessimistic, there will be no going back to the old ways. All of us have changed – for those who are alive, the scars vary. I'll go back to the dojo when it re-opens, but I know it will not be same as earlier.

One quarter (50) of the total respondents to this question bemoaned the loss of technical skill and physical fitness due to the training restrictions, with several suspecting they would never return to their former level at all.

I got fat, lazy, and unfit!

It will take a while to get back to where I was before with my training and will delay my going for my 2nd Dan by a year.

Due to the increasing age of the trainees, the level before the restrictions will probably not be reached in some cases.¹⁸

For combatants, this also meant a loss of sparring experience, which would impede their re-entry into the tournament circuit (13 mentions).

[The pandemic] will also introduce 'ring rust' due to the lack of sparring.

Definitely not as fit, will probably not be as resistant to punches/kicks due to lack of exposure.

While a few (7 mentions) fear worse technique as an effect of unmonitored solo training, others (8 mentions) emphasised the raised awareness of the benefits of solo training.

Poor technique due to online training.

[...] the focus on solo play and drills will improve my lifelong practices.

Instructors as well as average practitioners feared a huge loss of training members (40) and permanent shutdowns of martial arts training facilities (20).

My school is suffering financially and I have lost dozens of students.

Gym may have to close which will really make me think twice about ever training again.

Many students at our dojo will probably never return after lockdown. Hopefully many more new students will join. The composition of the dojo community has a direct impact on my practice.

[...] we did lose many students in our kids programs.

Remarkably, an Italian participant believed that the pandemic did not trigger the closures of martial arts clubs, but only accelerated them.

I would like to say that I do not consider the closure of gyms and sports centres dedicated to all contact and combat sports to be a response to the pandemic. That said, it is clear that such closures have desertified these, as well as other, activities.¹⁹

The remarks of several participants emphasise the perception of the pandemic as a caesura in martial arts culture, scarred by losses of personal and knowledge.

Some old masters will pass away. Some reputable dojos will close. [...] Some new dudes are planning with a small team to take over their area with some dynamite new curriculum.

18 'Durch das zunehmende Alter der Trainierenden wird zum Teil das Niveau vor den Einschränkungen wahrscheinlich nicht erreicht werden.'

19 'Premetto di non ritenere la chiusura di palestre e i centri sportivi dedicati a tutti gli sport di contatto e di combattimento una risposta alla pandemia. Ciò detto è chiaro che una chiusura del genere abbia desertificato queste, come altre, attività.'

Older martial arts trainers in particular may get so far out of practice that their training level deteriorates or they have to stop altogether. Also, the training needs to be adapted to the assumed lower level of the participants.²⁰

Somewhat depressed, 11 participants complained about dwindled training motivation.

A loss of interest of less motivated practitioners.²¹

Only mentioned sparsely (8 mentions), but fascinating nonetheless, is the fact that participants worried about the greater likelihood of aversion to physical contact after a long-term social distancing.

I hope we [...] get comfortable with people being close to us again.

Contact training will take a long time to come back and everyone being comfortable with it.

Certainly, the pandemic significantly changed perspectives on martial arts. For some, it produced or amplified an awareness of the importance of martial arts training for their mental health. Although this may relate more to the value of maintaining good physical/exercise habits in general, for some it suggested the potential value of martial arts in terms of therapeutics and public health.

[There are] mainly psychological [effects], due to inactivity and lack of training partners who are also my friends. Also I've lost a routine activity that I enjoyed and that helped me wind off from the troubles of work/personal issues.

I can see how important martial arts is to my wellbeing, and not just my fitness and ability to defend myself.

Bjj helps my mental health so for me I am currently more depressed, making wrong choices more often and generally not caring about myself as much as I should..... these things take a long time to get back.

I don't know if others have experienced it in this way, but I saw myself getting very irritable and agitated. Also emotionally vulnerable to some situations. And I don't know how long these are going to last.

Living and training under restrictions caused many participants to reassess their own relationship to martial arts. It brought about a stronger focus on the individual training progress, a self-motivated acquisition of martial arts knowledge as well as an improved self-discipline to continue the training even without a training partner present.

It gave me a great push in self-improvement.

I had more time to evaluate my goals and practice.

Opening up new perspectives and a good refresher on all the important basics.²²

However, I also am learning so much during lockdown. I feel that I have transformed as a martial artist through quarantine due to all of the opportunities I've had to reflect, get direct input from a range of masters, and perform independent research.

Training has been beneficial for encouraging more self-discipline to train alone, which will help post-lockdown to (will help with consistency of training).

Longterm I think it will even out and not be hugely detrimental. Across the span of time I've been training, a year focussing on solo training, detail and theory, is a fairly minor amount of time but will hopefully add extra depth when normal training resumes.

Undoubtedly, the pandemic gave a huge boost to online training. The forced transition from live group training in clubs and dojos as standard practice to experimental video streams affected nearly all practice characteristics. The methodology spread into synchronous (live) and asynchronous (recorded) online lessons, and the training contents diversified even more into regular martial arts training, fitness routines and theoretical input. It is no wonder that many instructors intend to keep online training sessions.

We may have more zoom classes.

A more diverse training offer becomes possible, including through digital training methods.²³

20 'Insbesondere ältere KuK-Trainer kommen vielleicht so weit aus der Übung, dass das Niveau des Trainings nachlässt oder dass sie ganz aufhören müssen. Auch muss das Training an das zu erwartende niedrigere Niveau der Teilnehmer angepasst werden.'

21 'Una perdita di interesse dei praticanti meno motivati.'

22 'Eröffnen neuer Perspektiven und eine gute Wiederholung aller wichtiger Grundlagen.'

23 'Ein breiteres Trainingsangebot wird möglich, auch durch digitale Trainingsmethoden.'

Study limitations

Before moving into the discussion, the limitations of this study should be pointed out. The mixed-method design and budget constraints inevitably led to a self-selected sample that, due to its complex diversity and the issue of selection biases, does not meet statistical standards for representativeness. Among other possible issues we identify the following. The country affiliation alone is ambiguous, as many professional martial artists train and sometimes settle abroad. Certain states as well as certain martial arts are noticeably overrepresented, and the proportion of martial arts instructors is significantly higher than the real ratio. All of this is an important reminder of the limitations and selection bias that are typically seen with relatively small number online surveys. As such our findings are likely best interpreted as a 'plausibility probe', rather than a definitive scientific statement.

The internationality and multilingualism of the sample also inevitably led to language-sensitive item formulations, which could have led to deviations in the results. This is accompanied by a socialisation-related interpretation of question items, which differs in essential points, for example in the case of the compliance item. The fact that the study team consisted only of the authors for reasons of data protection limited a communicative validation that is otherwise customary in qualitative content analysis. One might also object that the present study relies on respondents to accurately describe their training prior to the start of the pandemic. First of all, this is an issue common to all social research. Secondly, research indicates that self-reporting of value laden behaviours is not always entirely accurate. Still, the overrepresentation of instructors in our sample suggests that these reports may be substantively accurate.

Finally, it is not uncommon in social scientific research to rely initially on self-selected non-representative samples to derive preliminary conclusions on a specific topic. The relevant methodological literature [see for example Gossling et al. 2004] stresses the limitations but also points out the advantages of such research design to conduct time-sensitive, low budget, exploratory studies which might lead to more complex statistically representative surveys and allow for more robust analysis.

DISCUSSION

Speaking about restrictions regarding martial arts practice, we should not and must not forget the terrible impact of the pandemic on humanity as a whole, on the people in the health systems and other system-relevant professions, who are of immeasurable importance to the societies as a whole, but who are unfortunately probably only fully recognised as such in crisis situations. But above all, we must not forget the terrifying casualty figures, whose bare numbers obscure unbearable tragedies. Martial arts is arguably only a marginal and perhaps relatively trivial matter in relation to this global storm of suffering and death. As one of our respondents cogently noted:

We stayed inside a LOT. NYC was a shit show. Ppl were DYING here.

Nevertheless, the pandemic has also initiated and accelerated changes in martial arts that will probably persist long after the crisis has subsided. Remarkably, the two most significant trajectories have to do with the embodiment of martial arts. One of the developments leads us away from bodily interaction, while the other reflects the immense importance of embodiment in martial arts practice.

Digitalisation

Many item responses have already addressed how strategies for digitalising martial arts training and teaching have been invented and implemented in order to replace banned practices in the best possible way. Numerous creative variants of online teaching were used, from YouTube tutorials to live group workshops and individual coaching streams. Indeed, many participants have recognised the benefits of online teaching and intended to combine it with conventional on-site methods of training.

Although certainly more impersonal, online teaching is undoubtedly more accessible and can be more flexibly adapted to the individual training needs and interests of practitioners through online and offline formats.

It also made seminars more accessible. No longer are our 'big' seminars restricted to people who have money to travel across the country.

[...] I have started thinking about how the remote sessions I lead could potentially reach a wide audience if I make them good enough – that was never on the table before.

One study participant rightly suspected that the kaleidoscopic variety of online training formats would inspire the tech industry to provide

equipment beyond the usual home training equipment such as sandbags or training mats.

Increased focus or attention to online market for many martial arts business owners. Tech industry more aware of the needs of the martial arts market. More 'gadgets' created to simulate 'in person' training.

As has already happened in other branches of business and culture, digitisation leads to greater visibility and thus almost always to internationalisation.

More online teaching internationally.

Previous internationalisation processes in martial arts have always been hallmarked by mass media marketing, especially through martial arts and action films (as in such cases kung fu and karate in general, or specific styles such as wing chun, jeet kune do, or Keysi Fighting Method, for example) and broadcasts of competitive events, such as boxing, MMA or judo [Bowman 2010; 2013; 2014; Judkins and Nielson 2015].

However, as it is not nourished by films and broadcasts, but by interactive, flexible, formats for online training in all possible styles, this new wave will not carry one single martial arts style to the forefront, in contrast to earlier forms of the media-dissemination of martial arts.

Also, by expanding their training internationally, instructors are not only compensating for the financial losses caused by the pandemic-related loss of members. They also economise immensely on marketing and publicising their style and their personality.

My teaching has moved to online only including private classes. I now have students across the country and in UK and Taiwan.

This is of particular benefit to rarer styles whose visibility has so far taken a back seat due to the media overload of the more visible systems.

[...] thanks to online training possibilities via Zoom, for example, international groups are increasingly forming and so access to more rare styles and information [is made possible].²⁴

Two other effects of the pandemic restrictions mentioned by study

²⁴ [...] dank der Onlinetrainingmöglichkeiten per Zoom z. B. bilden sich zunehmend internationale Gruppen und so auch der Zugriff auf eher seltene Stile und Informationen [ermöglicht].

participants made this feasible. On the one hand, was the urgency to switch to martial arts styles whose practice was still allowed or most convenient under the restrictions. On the other hand, was the availability of more time and interest to expand one's knowledge of martial arts and to open oneself up to other styles.

I have a broader appreciation of other martial arts as I have studied them during the pandemic. I think I will be a better martial artist because of the lockdown restrictions.

It can be assumed that the diversification and increase in online martial arts content as a result of digitalisation will change the macro-organisational structures in the long term by leading to liberalisation and thus to greater autonomy at the micro level. Remarkable in this regard are the statements of a participant living in New Zealand who saw personal exchange endangered by the pandemic restrictions. He suspected that martial arts styles and organisations develop country-specifically as a result of different degrees of freedom of martial arts practice due to differently successful pandemic control strategies. Here is a selection of his statements, merged together for convenience and conciseness:

The NZ government's quick action to lock down the borders has however meant that since Sept 2020 to date (Feb 2021) we have been able to resume full training locally. The closed borders has however resulted in us cancelling 4 visiting instructor tours to NZ as well as prevented accessing seminars and gasshuku in Canada, Germany & UK in 2020. [...] Before the pandemic I would travel abroad for 8-12 weeks per annum to train. I feel this may not be as feasible especially if countries maintain quarantine requirements. [...] NZ has been extremely isolated globally. Needless to say this has been a game changer that has allowed us to date to navigate the pandemic with far less consequences than most martial arts clubs. In the long term I dare say we will become more independent in training approaches and rely less on international institutions to support our growth. This lack of direct contact with Hombu and Kai members cannot however be positive and will slow our development.

Another participant from the US identified the same problem as he estimated long-term effects.

Maybe more independence. This is not a good thing in koryu.

The two participants obviously regarded the qualitative integrity of their respective martial arts styles as being threatened by more autonomy at the national and micro levels.

We observed similar considerations regarding the competitive martial arts culture. The cancellation of major events due to the pandemic

has led to high-level fighters switching to smaller events that defy the restrictions more easily. Some martial arts tournaments also moved into the illegal sphere. The fact that many fighters of different strengths were concentrated in a few small tournaments will probably lead to a re-sorting of personnel in the upper martial arts leagues after the pandemic.

The extent of the damage done to the combat sports development pipeline is currently unknown. But promoters believe there's no doubt that the lack of bouts happening and scarcity of athletes competing this year – thousands fewer than previous years – will have a chain reaction that stretches from the amateur level all the way to the highest planes of the sport.²⁵

This effect is reinforced by the numerous martial artists who lost competitiveness due to curtailment of training, freedom to travel and interference of personal health.

I believe it will limit the number of training partners able to train martial arts together along with limit the number of competitions/shows for martial arts competitors for a long period of time.

The performance density in the competition circuit will have decreased a lot.²⁶

The pandemic restrictions also cut off many beginner courses which likely will slow down the recruitment of talented junior athletes over the next years. Consequently, the future of the martial arts circuit has been seen in contradictory terms. One participant believed that the proliferation of MMA tournaments on 'Fight Island' near Abu Dhabi has given the UFC a competitive edge.

I think Dana white has performed positively for MMA and the participation numbers will increase.

Another participant polemically rejoiced that the new digital visibility of traditional martial arts could contribute to their renaissance by the acquisition of more earnest practitioners.

25 Source: ESPN network: https://www.espn.com/mma/story/_/id/30056977/how-combat-sports-pipeline-broke-2020. Date Accessed: 10th June 2021.

26 'Die Leistungsdichte im Wettkampfbereich wird stark abgenommen haben.'

The martial arts will change because of this. The popularity of bjj/ mma was waning prior to covid, the pandemic will accelerate this decline. Bjj/ mma had already been following the same arc from fashionable and popular to shit kids activity that karate had already been on. Consumerism and mass participation has never done karate or any martial art any favours, once the kids take over it's game over. [...] Prior to covid kids had – thankfully – been deserting karate classes, they were all off doing bjj/ mma instead. In the post covid era we might see a return to interest in karate from a more serious audience, minus the babysitting.

Holistic embodiment

The study participants' exhaustive creative measures and ideas for maintaining or adapting their individual martial arts training not only illustrate the extraordinary resilience of martial artists. They also illustrate the often central importance that martial arts have in their lives. As mentioned above, it should not be forgotten that the participants in the study had an above-average affinity for martial arts and that more than half of them worked as instructors.

In addition to work-related and financial motives, another motive can also be discerned from many of the item responses. This can be characterised more as an urge and desire to practise martial arts, rather than regarding them as a simple habit [Meyer & Bittmann 2018; 2019]. Undoubtedly, martial arts was more than just a sport for the majority of the participants.

[The pandemic] has made me more conscious of the importance [...] of training is to me.

It is like missing out a part of your life – like memories of a long-lost childhood, ever alive but distant.

The pandemic has not only deprived people of much of their immediate (that is: non-media-based) social interactions. Social deprivation and being trapped in the home offers extremely limited physical movement and corporal contact beyond the closest social circle.

This affected martial artists in particular, for whom the supervision of the body, its reactions to stresses and injuries, and the constant confrontation with their own physicality and that of their fighting opponents is central. Besides the increasing influence of digitalisation, the primacy of physicality in martial arts is the second big tenet of the pandemic. The damage caused by the socialisation of no-contact in the pandemic will, by all accounts, be immense. This implies that embodiment in martial arts is always a social phenomenon. In dialogical combat, bodies interact and communicate – through how and which

fight techniques are performed – about the constant relationship of the fighters to each other, about their bodies and about their environment.

Martial arts practice is a socially embedded community activity. Even with the best of intentions, you cannot practice alone for long unless you are also visiting your dojo on a regular basis. If you're into contact-based martial arts where you require feedback from your partner, your practice definitely suffers.

According to one participant, there is also a philosophical dimension to this comparatively mechanistic understanding.

As a student of the 'traditional' martial arts, I believe the path to self-improvement is by walking the way with others. On your own, you are only left with your ego, and you cease to learn.

The (hopefully) unique period of disembodiment has thus not only shown that, especially in an increasingly digitalised society, the need for embodied impression and expression has not lost its power. It also shows that martial arts are an excellent tool for restoring or improving mental and physical health by constantly recalibrating the unity of body and mind. This insight encourages the implementation of martial arts even more in therapeutic, educational and delinquent contexts. Of course, this also applies to dealing with online formats, as the following commentary shows.

I also think because I suffer with social anxiety, I've found it a lot easier to self motivate without having to deal with seeing other people regularly.

The combination of both effects results in the realisation that online formats can certainly enrich martial arts practice which can also lead to increased interest, but also that direct instruction as well as direct hand-to-hand combat is irreplaceable.

The sustainability of the new routines will depend on my teachers. Will they continue to teach via zoom? The inefficiencies have been revealed. A degree of sparring and partner work is necessary, but not five nights a week. Much can be learned remote, with an adaptive, observant teacher.

CONCLUSION

While not claiming to be statistically representative, the results of our survey carry validity and suggest that the effects of the pandemic on martial practice across the global West have been both profound and complex. In some cases, these events seem to have accelerated market trends (such as the increased importance of digital media within martial arts instruction) that were visible before the start of this public health crisis. In others cases its effects are more counterintuitive and far reaching. By changing the perception of, and desire for, body to body contact among some martial artists, it is likely that the effects of this period will far outlast the immediate public health crisis.

Martial arts are far from the only social or economic sector attempting to adjust to the contours of this new reality. While our survey ended up giving more insights into the lived realities of martial arts *instructors* than martial arts *students*, it is important to remember that the vast majority of martial arts and combat sports practitioners approach their communities as consumers whose access is limited by the constraints of economic logic. Herein lies perhaps the greatest set of unknowns as we contemplate the post-pandemic future of the martial arts: will such people 'come back'? Will parents take their children to martial arts classes in such numbers in the coming months and years?

Furthermore, these practices, like all other choices, come at a certain cost. If employment opportunities, and the economic recovery more generally, stalls in Japan, Europe or North America, the rebuilding of lost schools and diminished styles will likewise be stalled. Indeed, the long-term damage from such a slowdown could actually outweigh the disruption of the pandemic itself.

Alternatively, an economic boom set off by inflationary government policies could create a situation where the opportunity costs of returning to the dojo, gym, class or kwoon is just too high, even among employed individuals. As both wages and prices rise, it is entirely likely that consumers will decide that there are more economically productive ways to spend their weekly leisure hours. (Daniel Amos, in his study of the declining fortunes of Hong Kong's martial arts community has already demonstrated that such seemingly positive economic conditions can have an even greater negative impact on the growth of martial arts communities than economic stagnation [Amos 2021].)

In short, this pandemic has demonstrated that martial practice never exists in a social vacuum, nor it is completely independent from economic forces. It is a useful lens for scholars precisely because it reveals so much about the ways that individuals are impacted by, and attempt to respond to, vast systemic pressures. Fully predicting the future course of martial practice will probably never be possible because the direction of these future trends is, by their very nature,

unpredictable. Yet by opening a window onto the desires and motivations of a transnational group of martial artists, we hope to provide scholars with tools to better understand the challenges which the coming years will certainly bring.

Finally, we would like to extend a sincere note of gratitude to all of those who participated in our survey and shared it with their local martial arts communities. A special note of thanks is also in order to the individuals who assisted us in the translation of this material into several languages. While the current effort has been preliminary in nature, we believe that our results suggest the importance of a transnational focus within the field of martial arts studies. None of that would have been possible with the generous cooperation of so many others.

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[doi: 10.15495/ojs_25678221_22_129](https://doi.org/10.15495/ojs_25678221_22_129)

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MAINTAINING CLOSE CONTACT FROM A DISTANCE DIGITAL AIKIDO TRAINING UNDER COVID-19 CONDITIONS

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DOI

10.18573/mas.128

KEYWORDS

aikido, caring coach, COVID-19,
digital learning, social cohesion,
transformation martial arts

CITATION

Kantzara, Vasiliki, and Martina Loos. 2021.
'Maintaining Close Contact from a Distance:
Digital Aikido Training under Covid-19
Conditions'. *Martial Arts Studies* 11, 32-45.
doi: 10.18573/mas.128

ABSTRACT

This work explores, reports, and reflects on the teaching and learning aspects of online courses in aikido under COVID-19 lockdown conditions in Greece. The essay is based on research and auto-ethnographic accounts of the digital courses the authors have set up as teachers of aikido during the pandemic. There is little research on pedagogic and didactic issues of designing online courses in martial arts or on outcomes of digital learning. Thus, the present text aims to explicate the theoretical background drawn from different scientific disciplines in designing an online course in a martial art. This course attempted to meet the challenge of teaching online an art that 'normally' is taught face-to-face, entailing physical practice in pairs. Thus, the ramifications of online teaching and learning are far reaching as they affect the participants and their families helping them to maintain a sense of wellbeing or normality under trying conditions. The social aspect of teaching a martial art online showcases its changing nature as well as its potential and possibilities for contributing to social cohesion, in the face of the grave dangers the current pandemic poses for humanity. It is an aspect of martial arts that could be taken into account when discussing their future in society.

1 INTRODUCTION

This article reports and reflects on research and auto-ethnographic accounts of issues and challenges arising from online teaching and learning in aikido, a martial art, under COVID-19 lockdown conditions in Greece.

In the unprecedented times of the COVID-19 pandemic of 2020, athletes faced a range of challenges, such as social isolation, fear, stress, anxiety and grief over the world pandemic, job and income insecurity, or changes in body image and composure [Australian Institute of Sport (AIS) 2020]. Team and contact sports including self-defence were particularly affected by the lockdown and subsequent restrictive measures. In addition to teaching technical skills, sport teachers, instructors and coaches are often providers of care and support to their athletes, especially in times of crisis, to help them maintain their psychological and physical wellbeing. Currently, this aspect of social support seems to be particularly relevant: because of ‘social distancing’, athletes could not meet with their teachers, nor could they train face-to-face. Ideally, in crisis situations, sport teachers, instructors and coaches assume a particularly caring attitude and provide their athletes training environments that are ‘caring spaces’ [Dohsten, Baker-Ruchti, and Lindegren 2020; Samuel 2017; Noddings 2012, 2005].

Martial arts are not usually associated with distance learning as the training involves skills associated with the ‘body’. This became apparent in the collective perplexity of athletes and teachers on the question of how to proceed with training during the first lockdown in spring 2020.

Synchronous virtual conferencing, asynchronous YouTube tutorials and other social media as well as telephone calls provide useful tools to bridge social distancing and continue with training and physical exercising, albeit in different forms. In a ‘caring’ online dojo it becomes possible to spend time together ‘being in a microcosm of the socially connected world, a place where there was no “other”; there were only all of us’ [Samuel 2017: 77]. For us, reaching out to the members of the aikido group – that is, children, adolescents, and adults in a suddenly restricted living environment – meant organising remote self-defence lessons. In martial arts, learning depends on direct physical contact with the teacher and with the other co-athletes, because training in pairs constitutes the customary – and for some teachers and athletes the only – way to progress in one’s art. The lockdown conditions thus posed an immense challenge to aikido teachers and students as how to proceed from there.

There is little research to date on pedagogic and didactic issues of designing online courses in martial arts or on outcomes of digital teaching [Koerner and Staller 2020]. This essay aims first to explicate the pedagogic and didactic issues involved in designing an online course in a martial art. Secondly, the text reports on learning outcomes, especially on the importance of maintaining contact for group cohesion. Thirdly, on the basis of the experience acquired from the online courses we have set up, the article reflects on the wider implications of digital and remote teaching of martial arts for the art itself and for maintaining social cohesion from a sociological perspective. These issues form concerns of the debate for the future of martial arts and on relevant research on sports [see e.g. Bowman 2020; Evans et al. 2020; Brown and Johnson 2000].

The essay aims at answering three interrelated questions: how to design an online course in aikido in pandemic conditions that meets several technical, pedagogic, and social requirements of the art along with individual needs of the students? What are the outcomes we observed of the online course we implemented on individual students and on the group? What insights are gained that may contribute to the study of martial arts and the debate on their future under pandemic conditions?

The first question is answered by undertaking a literature research on relevant approaches in different disciplines. The second question is answered on basis of observations acquired using the self-authored ethnographic approach. The material comes from the online, synchronous, courses we designed and implemented in aikido. The third question is taken up in the concluding and reflective part of this work.

We have devoted much of our lives to the art of aikido. At the same time, we are experienced sociology and pedagogy teachers and researchers, respectively. Our plan from the outset was to continue training aikido in lockdown conditions and at the same time to focus on ensuring that our aikido students were learning something new that could help them progress towards mastering more of the art. The Greek government instituted the lockdown of schools including sport facilities on the 10th of March in 2020. Two weeks later, schools commenced online teaching. Much to our own and our students’ surprise, we also started online aikido lessons.

We soon realised that remote teaching brought us all closer as group members. This seeming paradox is part of what we would like to explore further in this article. The subsequent lockdown conditions in the autumn months of 2020 showed that it was important that online courses continue. Our own motivation and determination

were strengthened by the encouraging feedback we received from our students. With this article, we share our thoughts, findings, and experiences, to advance the conversation with other scientists and practitioners inside and outside of the martial arts training world.

This article consists of five parts: this introduction is followed by the second part which discusses the theoretical background of designing an online course in martial arts. The third part focuses on the design and implementation of the online courses. The fourth part provides a short description of the learning outcomes, and the fifth and final part reflects on the course by discussing several issues involved in teaching and learning in martial arts under the pandemic conditions.

2 THEORETICAL BACKGROUND (OR 'WHAT WE KNEW BEFORE') AND METHODS OF RESEARCH

In this part we discuss the research undertaken, the design of the online course, and the methods used to report and reflect that underlie this essay. In relation to the theory, the framework cuts across different disciplines, such as sports education, media pedagogy, with a focus on visual perception, and sociology of education from the point of view of promoting participation, social support, and community. The digital courses in aikido described in this essay could be viewed as best practice that cut across these various disciplines. The different disciplines that are related to our project are explained in the subsections below.

2.1 Sports pedagogy

The aikido online courses that took place during the COVID-19 lockdown were informed by sports pedagogy. Martial arts can borrow from sports pedagogy that focuses on aspects of education, training, providing support, advice, and information. Furthermore, the online, synchronous course we designed was embedded in the theoretical framework of critical-constructive approaches in sports pedagogy [Light and Harvey 2017; Fitzpatrick and Russell 2015; Fitzpatrick 2013; Lather 1998]. These approaches emphasise attitudes of self-determination, participation and solidarity between the athletes that are at the same time key points of training in aikido. These aspects are further discussed below.

2.2 Social support, social networks, and teachers' professionalism

One focus of the project was on the aspect of supporting each other as a relevant factor for mental and physical health as well for strengthening individuals' resilience [Cobb 1976; Gallant 2013]. Social support¹ is ascribed a protective and intervening effect for human wellbeing and it is provided and maintained in social relationships and supportive interactions. Social isolation may have negative effects on mental and physical wellbeing, and it may cause stress symptoms increasing the risk of illness. Thus, social support in social networks became particularly important under COVID-19 [Liu and Heinz 2020].

Friendly interpersonal relationships in a sporting context have been identified as an important resource for athletes. The quality and type of social support an athlete receives promotes injury recovery, strengthens participation, prevents burnout, boosts self-confidence, and enhances performance [Sheridan et al. 2014]. According to the literature on sports, social support is identified as one of the key strategies in coaching, and effective coaches create an environment to enhance close, committed, and caring relationships with athletes in order to support their development both as performers and as individuals. Therefore, coaching, teaching, and instructing can be defined as pedagogical activities with an inherent 'duty of care' [Dohsten, Barker-Ruchti, and Lindegren 2020; Jones and Kessler 2020; Cronin and Lowes 2019; Teck Koh et al. 2019; Samuel 2017; Noddings 2012, 2005].

According to Moore [2010], the relationship-building process between coach and each athlete is central for creating a caring climate. This does not mean becoming best friends. It does mean learning about their lives in and out of training.² According to authors, a caring climate 'will make us and our training sessions a 'safe place' to be – a place, athletes want to be!' [Moore 2010: 6]. The strange pandemic situation presented sport teachers, instructors, and coaches with the challenging tasks of overcoming social isolation, building social connectedness, and creating a sense of belonging for their athletes to make them feel more secure. Leaning on the concept of social support the focus is on social relationships between individuals and therefore involving social networks. Social network theory assumes that individuals do not act

1 Social support is defined as information that gives the impression that a person is cared for, loved, valued and is part of a network of mutual obligations. As a coping resource it can protect people in critical life situations from a variety of harming conditions [Cobb 1976: 1].

2 We are aware of the abuses of the so-called care some teachers show to students, but this aspect is beyond the scope of this paper.

as isolated atoms but are embedded in a network of interpersonal relationships. In pedagogy, the network perspective is traditionally adopted in the context of interventional and coping strategies [Brisette, Scheier, and Carver 2002; Gallant 2013], and is thus applicable to the pandemic situation. The adult, adolescent and child members of the three training groups of the 'Aikido School Athens' organisation including their families, the two female teachers and selected aikido instructors from other dojos are defined as a social network and as a community that is part of a larger collectivity. In sociology, the best-known approach to the issue of cohesion is Durkheim's work stressing the importance of sustaining social ties. To this end, he mentioned 'attachment' or 'commitment' to a group as a way of promoting social cohesion. In his theory of moral education, Durkheim, the classical theorist in sociology, argues that teaching students to acquire personal discipline, group attachment and autonomy contributes to their socialisation as part of the community they find themselves in [Durkheim 1973]. The online aikido courses we designed had this approach in mind and fostered attachment to the group. Social cohesion is achieved for ties and bonds between people are sustained first at a micro level, that is at a group level [Kantzara 2011]. As individuals move through different circles and networks of relationships, from smaller to larger webs they carry with them the sustaining ties and experiences and affect those around them. The image of throwing a stone in a lake and the successive far-reaching waves to the shore, capture the idea of social influence we have in mind.

Furthermore, aspects of teachers' professionalism inform our work both towards the students and towards the wider community. Teachers' professional attitude explains much of our own motivation to set up the online courses and to report on them for a wider community. To explain it briefly, a well-known approach on teachers' professionalism is developed by the sociologist, Oevermann. He distinguished three different professional responses teachers may adopt in crises and refer to human cooperation. The responses may include: (a) maintaining a shared understanding of reality as the basis to be able to intervene successfully in the world, (b) creating a consensus on norms and values of living together, and (c) sustaining the physical and psychological integrity of an individual, a group or the representatives of an organization that is placed in such a context [Oevermann 1996: 88-91]. These aspects form important aspects of teachers' work though often go unacknowledged.

During the pandemic, according to our sources, many teachers attempted to care for their students and kept contact with them in various ways. It is likely that most did not, however, undertake online synchronous teaching, something worthy of further research.

Next, we discuss aspects of digital learning.

2.3 Digital learning and visual perception in martial arts

The use of digital media in physical education and training is theoretically substantiated in sports pedagogy and follows didactic reasoning. With the expansion of the use of the Internet and corresponding software, sport didactic processes can be stimulated and supported by digital media [Novak, Antala, and Knjaz 2018; van Hilvoorde and Koekoek 2018; van Hilvoorde and Pot 2016]. Video-supported training is defined as a method for self-reflective and action-oriented learning that focuses on learning or improving motor skills, as well as possibly visual skills or techniques. Videos are used for independent movement correction, in which, with the help of extrinsic (visual) information, the athlete can correct her/his intrinsic movement to approximate it to an ideal technique [Nowowski et al. 2012]. Apps, tablets, and smartphones are also used in modern physical education and training so that athletes can observe and assess their movements themselves. Increasingly, sports e-learning platforms are being developed to help athletes improve or excel in their performance [Huang et al. 2010]. Other examples – and not solely because of the coronavirus lockdown – include online lessons for activities, such as yoga and taiji (also known as 'tai chi'), provided via synchronous and asynchronous digital courses. Usually, most of these digital learning activities are supplementing the live, face-to-face training.

Learning martial arts techniques is a time-consuming training activity and can be assisted by the use of digital media. In the field of competitive self-defence sports, the professional use of digital media is increasingly used to learn movements, techniques, and correct body postures [Vahidi and Müller 2017]. In Brazilian Jiu Jitsu for example YouTube channels are additionally used to communicate new techniques, convey attitudes, and to create a community of practice [Spencer 2014]. For aikido training purposes, practitioners have long used both professional and amateur videos and instructional films. Theoretically, these audio-visual videos are based on model learning: the practitioner tries to copy the teacher's movements. However, there is seldom a demonstrable pedagogically structured use of these digital media in aikido training and the production is often not based on sports didactics. Some, but not all adult and adolescent athletes from our school used relevant videos to improve their learning and performance, especially when they prepared for exams. The children, however, were not accustomed to this way of learning aikido. Nevertheless, it could be assumed that aikido practitioners of all ages have the distinctive ability to learn a movement through visual perception, because it is already promoted in self-defence training through the training structure: Every technique or exercise is shown by the teacher and, if necessary, also explained verbally. Meanwhile, all trainees sit at the edge of the mat and watch the teacher's movements when s/he executes techniques.

In addition to the kinaesthetic perception for self-movement and the anticipation of external movements, for example, from an opponent or instructor, visual perception is thus fundamental to aikido as it is to all martial arts [Ju et al. 2018; Jendrusch 2014; Sickenberger 2011]. By implementing our digital courses, we could assume that all participants would be accustomed to visual-based learning of aikido movements.

2.4 Methods of research

The perspective we adopt draws on the concepts of online, synchronous teaching, caring attitude, keeping contact with students, and developing suitable teaching material. The concepts and their grounding in literature have been explained in the subsections above.

This essay draws on the qualitative paradigm that focus on uncovering relationships and exploring social phenomena and different areas of social life, including sports. As Brustad succinctly formulated it:

Sport is an entirely human endeavour. Our involvement in sport and physical activities is full of personally and socially generated meanings as our participation occurs in interaction with other individuals in various social and cultural contexts. Qualitative researchers in sport and physical activity have an essential role in uncovering the meaningful nature of this involvement.

[Brustad 2009: 112]

Since no reference experience in a comparable context was available, this essay has an exploratory character and is grounded in the study of relevant literature regarding critical sports pedagogy, media pedagogy in sports as well as sociology of education. This work is also based on self-authored ethnography aimed at showcasing the dynamics of interpersonal relations from a distance that sustain both the individuals and the community they find themselves in [Chang 2008; Tombro 2016]. The auto-ethnographic material includes keeping detailed notes (i.e. diary keeping), video recording of all the online lessons, and photography as well as notes from talks and reflections with some experienced students, other aikido instructors in other countries, and from participating in the discussions that take place in international aikido fora.

For answering the second question of our students' learning outcomes, we were keen to note changes in a diary during the online training; when we could return to training together outside, we observed the progress made. Furthermore, we asked for feedback in various stages of the lessons and in various ways. The feedback was voluntarily provided via WhatsApp messages, comments in the Facebook group, as well as

verbal comments and discussions during the outdoor training. We also devised a questionnaire in the form of a small-scale survey, which we explain below. Additionally, our ideas, reflections and findings from the auto-ethnographic material are substantiated by other ongoing research on teachers in formal education in Greece and Germany that focused on studying their stance and work during the pandemic [Kantzara and Loos 2021].

In sum, the design of an online course draws from different disciplines that emphasise exercising different skills, like visual perception and kinesthetics skills in a digital training environment. The challenge has been to use digital means not as a supplementary training but as a 'normal' one, and for the time being the only available way of teaching and learning under the pandemic conditions. In addition, the discussion within the wider community but also in sports pedagogy and sociology of education emphasises contact, support, and creating ties to sustain individual students and the community they live in. Methodologically, this essay draws on the qualitative paradigm and uses a variety of tools to explore approaches, ideas, and implementation of an online course and reflect on them.

The next part explicates issues in teaching and the setting up of the course.

3 AIKIDO TEACHING AND TRAINING

Aikido is a self-defence martial art emphasising cooperation and peaceful conflict resolution. It lacks competitive games, and the practice consists of training physical as well as mental components. The ideal of aikido as expressed by the founder Morihei Ueshiba (1883-1969) is not about fighting or defeating an enemy, but about learning how to harmonise and create room for peace instead of conflict.

The student is expected to learn aikido techniques by close observation of the teacher, who apart from presenting physically a technique, uses verbal explanation as well. Additionally, aikido teachers usually attempt to give to their students an understanding of the whole 'system' of forms and principles, while explaining the techniques. Furthermore, (wooden) weapon techniques enhance and deepen the understanding of movements and principles of 'connecting' to the opponent while responding to attacks.

To make it easier to practice we implemented two training strategies: complicated movements were divided into several parts to be

performed singularly and shadow training was introduced especially for the children training, but also for adults preparing for exams. Self-defence is not understood as practicing in a violent manner, but rather how to preserve self-control and react non-violently in potentially volatile situations [May 2014; Sutton 2020]. Therefore, aikido practice and training is enriched with exercises directly aimed at calming the mind, connecting body and mind, helping one to extend from within and to achieve balance and grounding. The usual training in our 'dojo' already included ideas of this concept before the COVID-19 lockdown: children and adults, beginners and advanced practitioners were used to the idea of transferring aikido principles to other situations in their everyday life. Selected aikido exercises and movement patterns were used to convey ideas related to conflict management, violence prevention and stress reduction.

The above-described orientation provided for us an appropriate basis for designing the synchronous (online) digital aikido courses during the pandemic. The next section describes the issues that make an online course a challenge to be addressed.

3.1 Teaching via a screen – a challenge

When schools, gyms and other sports facilities closed their premises, the first reaction in many countries has been to stop with teaching and training till the restrictive measures were lifted. At the same time, a discussion that we personally followed on social media emphasised the responsibility of teachers and aikido schools to keep contact with students and take the courses online. The idea behind was that by reaching out to students, this may favourably affect them personally and by extension their families and the communities they live in. This thought fits squarely with aikido peace making principles and philosophy. Aikido was changing or had to, that much was obvious, but the problem was how to achieve all this? Moreover, what does contact mean? And most importantly, how to set up a course that is meaningful by serving so many purposes?

From the outset, the online course fulfilled many purposes: to keep contact and support members and through them the community of which we all are part; to continue with training and learning and in so doing to cultivate one's art and skills; to spend time meaningfully; to keep children busy with learning and to help them grow; to provide a sense of 'normality' in adverse circumstances; and to provide a perspective for the future.

There was only one obstacle: the provision of a synchronous online course was novel, though video and films were used for learning as we mentioned above, it was quite different to meet online through

the medium of a screen that permitted a partial visual perception that was adequately comparable to actual, physical presence. Additionally, the challenge was not simply to design a course with training that repeated things learned or substituted the physical part of the training with weapon training – all of which are valid learning aims – but also to be able to address and motivate individual students and to tackle new learning material that would further their skills without a training partner on the spot.

Below we explain how the course was set up and implemented.

3.2 Design of the Aikido online lessons and digital means

The online aikido courses addressed two different groups: one for children aged 5-12 and a second one for adults including adolescents from 12 years old. The group composition (mixed groups in terms of age, progress, gender) as well as the schedule was kept similar to the live training. Jotting down the names of the students who participated in the online training was done like in the dojo and provided a means for the teachers to follow individual student participation. Thus, many things related to the training remained the same, but in a different context.

The digital means used to provide the online courses and keep contact with group members were the following:

Digital synchronous conferencing (videoconferencing): in the beginning, we chose an open-source platform named Jit.si that seemed easy for teachers and students to set up and handle during the lessons. Some athletes followed the online training via their mobile phone, and so difficulties arose in the beginning before changing it for a larger screen.

Video platform: The teachers created a channel on the free platform YouTube to post videos from the lessons to inform other athletes and the public. Taking data protection into account, all the lessons were recorded by a different camera than the one provided by the video conference application. The channel gave all group members, their families, and friends as well as aikidokas from our wider network of Aikido schools in Germany and Greece the possibility to follow some of the digital lessons and to use the material for their own training.

Virtual classroom: The teachers created a classroom called 'Online-Aikido for Kids', in the free platform Google Classroom, to keep contact with the children and their parents beyond the training. The teacher gave once a week a task, as for example asking the

child to paint the place at home where the child was exercising during the course. Half of the children in the group used the opportunity: paintings and pictures were sent to the teacher who forwarded them to the other group members. Since the children were dependant on an adult's presence and technical expertise, this medium was not used very often.

Social media: Additionally, we set up a network of various degrees of inclusion for the adults. The aim was to support and connect the group beyond the virtual classes. Thus, we set up a group on the Messenger application that provided the opportunity for day-to-day virtual discussion and exchange of information between the members. At a second level of inclusion, we used a previously set up 'private group' on Facebook in which a larger number of people participated including ex-members and friends. At a third level, there was a more formal page on Facebook that had been set up years earlier for our aikido organisation.

Thus, in a way there was a centre of a small group that radiated through different circles, sharing information on aikido related issues, like the stone in the lake we mentioned above. The circles in our group were constituted by the different group members that signified different levels of privacy and digital intimacy facilitating connection to the teachers and to each other. The group on Messenger was active daily in posting anything that was relevant to the members, e.g., an interesting poster, a photo of an aikido master, a link to a video, as well as many pictures group members made of the teachers (i.e. screen shots) and of themselves as participants. The contact in the group was informal and humorous at times that helped create a feeling of daily participation in a common project with a shared target; this group created a feeling for participants of belonging to a community.

Contact via email and telephone calls: At the same time there was very often an informative email sent out to students and to the parents of the minor members. The invitation to the virtual courses was sent before all trainings to remind them so that they could prepare accordingly. In addition, an occasional phone call by teachers to parents or adult students proved an important means in maintaining contact and showing care from a distance.

In short, the contact between the group members themselves and between students, parents and teachers was organised on different levels of intimacy and privacy, ranging from formal to informal and friendly.

3.3 The setting and the course content: home dojo

The living room in our shared house was arranged as a dojo and fortunately we had all the necessary equipment at hand: the mats (3 tatami), the aikido clothes to wear (keiko-gi), aikido logo and the picture of the founder to make a dojo at home, including the wooden weapons. It was important, that this small 2x3 meter training location corresponded with the environment that other participants had in their own homes. In this way the teachers adapted their movements to a restricted space the same way the participants had to. Nearly all participants had one disadvantage compared to the teachers: they did not have sufficient mats to allow for the normal falls or rolls that are usual in aikido. This had to be taken into consideration in order to prevent injuries.

In the beginning of the digital training, the aim had been to connect with everyone and solve possible technical problems. This was followed by teaching aikido movements and principles. A calm composure and balance while physically exercising was experienced as energising by the students and during the many weeks of online training. Since conflict resolution by peaceful means forms the main target in aikido, calmness, grounding, and cultivation of balance contributed to this aim. Additionally, as teachers, we had to invent a new concept of teaching, a time and energy consuming task, but a very creative challenge. We had to adapt to the fact that nearly all participants were following digital training alone in front of their computer or smartphone screens. Therefore, the exercises and techniques had to be changed from executing an exercise or technique with a partner to an individual, solo, movement. In martial arts there is a concept for this, it is called shadow training as we mentioned above. In addition, the limited space had to be considered to prevent accidents or cause damages to the individual or the room, especially, when training with the (wooden) weapons.

The very first lessons for adults and adolescents were devoted to teaching principles of movement instead of techniques or forms using humour to relax everyone. We also spent time to teach principles of aikido with philosophical underpinnings, like *zanshin* (awareness) or *mushin* (empty mind). The first children's lesson was designed to be very playful, and the instructor did not introduce any new elements except the possibility of using household items for exercising (e.g. a ball or a broomstick). All movements and techniques were already known by the children from the training before the lockdown, and so they gradually became familiar with performing them in an unusual virtual situation.

Soon we modified the concept of the adults' lessons and incorporated more body movement and wooden weapon training. We thought that

we all lived in a secluded environment and needed the exercise more than an elaboration of a philosophical principle, which students could read about instead of being told during lesson time. Thus, the training began to start normally with the warming up and aikido techniques followed combining techniques or forms (i.e. shadow training) with principles for individual participants. Gradually, we incorporated into the course training with wooden weapons, such as the *jo* (staff), the *bokken* (sword) and the *tanto* (knife). We had to concede that falling and rolling from a standing position was not possible, because of limited space.

Self-defense can be conceptualized as a mode of physical communication with dense body interaction; because of social distancing this physical component had to be adapted. To make the virtual practice more tangible, we implemented more functional optical and acoustic stimuli in our training. Additionally, for participants without a training partner, individual tasks and exercises of defense techniques included kinesthetic stimuli from, for instance, a wooden weapon, a ball, or even a small pillow [Koerner and Staller 2020]. During the synchronous online training, interactive defense reactions to a simulated attack by the teacher, visually and acoustically mediated by the camera, was possible. On the other end of the screen, the participants could also take on the part of the attacker and the teacher showed the defense part. Our athletes, especially the children, liked this kind of virtual interaction.

As the weeks went by, we changed some aspects of the course content and kept others steady. There was progress in learning techniques, principles, and forms with the wooden weapons, and the students had the feeling of learning something new. We also included meditation and elementary qigong exercises. Additionally, group members were invited to contribute with exercises, for instance, from pilates, movements from wing chung or karate or to present a principle of aikido.

The course content gradually acquired a familiar recurring structure: a welcome talk in the beginning followed by training and ending with some talking. During these informal talks, students expressed themselves and their concerns. Information on COVID-19 was imparted by the teachers as well as information on the situation in other aikido schools inside and outside of the country. In this way, the feeling of belonging to a wider community was strengthened. Almost the same course structure was developed for the children's training. First talking, then doing aikido and then again talking so that kids could express wishes for their next lesson. The courses included warming up exercises, and techniques for developing balance, flexibility, and coordination skills in a very playful manner. Exercises with the *jo* staff (in some cases made from a newspaper) and ball as well as 'Brain Gym'

movements delighted the children. They understood that falling and rolling from a standing position was not possible and they adapted quickly; children even invented new exercises and felt free to ask for special techniques.

The first online training period lasted ten weeks. Then followed outdoor training during the summer months. After the training, it seemed like nobody really wanted to leave the outdoor training location and the group including the children felt like a big aikido family. Parents and partners took part in much post-training communication. After this period, we had a summer break and resumed training in September. Initially we could train in the gym, but soon the second lockdown was issued, in November 2020.

The online course was set up very quickly, our aikidokas followed the online lessons regularly and we even had some new students joining us. Our online teaching improved during the pandemic, transforming more and more aikido movements, adapting them to individual, solo, training, known as kata (form) or shadow training, common in other martial arts, but not in aikido. Initially, we showed simple techniques and step movements as katas; we then developed exercise sequences for more complex techniques that could be performed by individuals alone. Because there were always the two of us in the home dojo, the participants could also be shown the technique in the pair version, so that they were not solely dependent on their imagination. It was found beneficial both by advanced learners and, above all, by beginners. We should mention that the focus was on performing the technique alone, because most athletes did not have a training partner.

As teachers we had to navigate through all these changes and adapt curriculum, timetable, and digital means along the way, managing ideas and people in an altered working condition and precarious situation. Students responded positively to teachers' efforts, and this helped us as teachers to propel forward with renewed energy. The participants including the kids increasingly contributed their ideas, expertise and wishes to the training. We learned a lot about the bases of martial arts during this period and so did our students.

The next section addresses issues of learning.

4 LEARNING OUTCOMES

In our digital synchronous courses, many things related to the training remained the same though in another context. This routine helped maintain a feeling of continuity in learning even though the conditions had significantly altered. The motto that was expressed by aikido schools who endorsed online lessons was 'the dojo is where we train'. It had a ring of truth in it, as aikido students know that they can study aikido everywhere, literally, and this includes the digital world as well. According to the level of digital skills, all attending adults found a way to participate; over the weeks, most of the children were able to handle the computer, smartphone, and the software on their own (e.g. muting and unmuting the microphone, and switching on the video function). Children especially were proud of themselves for mastering this new knowledge.

Approximately 16 adult and adolescent students stayed with the group until the end of the first digital training period; they all followed the outdoor practice and most of them joined the second online courses during the second lockdown in November 2020. For the children, the situation developed differently: some parents did not find the time to bring their child to the outdoor training location. Other children could not attend the outdoor lessons, because they lived with family members who belong to the COVID-19 risk group. Four children who attended the online course were able to participate in the outdoor lessons regularly. The links to the videos uploaded on the aikido school channel on YouTube, which we made from the kids' online training, were sent to all parents during the summer break. Some children asked for this as a favour during the last outdoor course.

During the outdoor training, we could observe that the regular students had progressed in their kinesthetics and gross motor skills (i.e. balance and coordination) as well as knowledge of the art of aikido, especially in (wooden) weapon training. The mastering of the aikido defence techniques did not progress as it would have been when training in a dojo, but the visual perception and understanding had progressed enormously: e.g. changing hands in handling the wooden staff or self-correction of stances and steps without verbal explanation. We could also observe that many participants showed a quick and adequate reaction to attacks, even if these did not always correspond to the correct technique. Children, for example, stepped aside instead of freezing as they normally do. This observation led us to adjust accordingly the content of the online course during the second lockdown in autumn 2020.

For purposes of formative feedback, we invited comments from the students, and we conducted an anonymous online survey. For the minor participants, two questions were crafted that were sent to their parents, who could respond via email or telephone.

This feedback will be briefly discussed. The unsolicited comments we received during the outdoor training encouraged us to continue with our work:

'You [two teachers] set a millstone, not only for our daughter but for the whole family. We waited for the courses every week and they were something steady in the week, heartfelt congratulations' (Father around 40 years old, about his daughter, 6 years old).

Another example from an adult student:

'Probably you have heard this from everyone, but you [to us as teachers] were great; we followed the training with the whole family; we did all the exercises, and in the morning, we repeated them with the whole family; bravo to you, congratulations, it was great' (man, about 55 years old, with two kids 10 and 13 years old and a wife).

The above quotes are not meant as self-congratulatory, but rather as an indication of the kind of comments we received during all the months (now nearly a year) of providing online, synchronous, training. The reason did not lie solely in the content, as one may think, but that we took the lessons online, something that during the first lockdown was not at all common.

The questionnaire in the form of a small-scale survey we conducted contained nine closed and one open question and was carried out with the online tool Survey Monkey. The survey was open for several weeks. The questions were answered by nine regular attending students of the adult course, i.e., more than half of the group members. (The survey link was not sent to the adolescents for privacy reasons.)

The main results of this survey are described in qualitative terms. In terms of importance, students thought that contact and connection to teachers and contact with other members was most important, followed by keeping up with the art and their personal routine as well as doing physical exercise. Less important were information given on topics such as COVID-19 measures, progress, or preparation for aikido exams. In terms of what they missed in the online training, most of the students missed the rolling and falling exercises on the ground. The course furthermore provided them with a meaningful way of dealing with the everyday precarious world.

For purposes of receiving feedback from the children, two questions were sent to the parents by email and Google classroom: (1) Could you please describe what you liked about the digital aikido training with Ms. Vasiliki and Ms. Martina? (2) Could you please describe what you did not like about the digital aikido training. We received answers from 4 children aged 6, 8, 10, 12 and from their parents.

From a 6-year-old girl, who had attended aikido classes for 10 months before the lockdown, the father sent the scan of her handwritten answer to question (1):

'When the Corona lockdown began everything was completely broken. When the digital lessons began, I was happy again.'

And to question (2):

'I did not like that we could not be [physically] close.'

The other children, all boys, liked to meet the teachers and the other children, to learn aikido in a different way, namely at home, appreciated that the digital training distracted them from being secluded at home and enjoyed the exercises with the jo (wooden staff).

Personally, we did not expect such a positive feedback, and this gave us more energy to continue with our lessons and also to start writing up this article and share our experience with others inside and outside the field of martial arts training.

5 CONCLUSIONS, DISCUSSION, AND KEY POINTS OF DEPARTURE FOR THE FUTURE

From this online teaching project, we could draw many conclusions: for the children it was very important to have contact and physical exercise, especially, because normal schools and other sports did not do this during the first lockdown. Thus, they and their parents had a steady point of reference in their lives, a schedule that they looked forward to and to help them face the everyday challenges. The children developed further their coordination skills, visual perception and digital media skills and progressed in techniques and other components of the aikido training.

The same holds true for the adults. The fact that there was a possibility to continue online and get support from teachers and co-athletes were

often more important than the content of the training itself: for two hours their minds were distracted from their problems. Later, after solving the technical issues with the internet they were also grateful for the content, and they liked the design of the course; they even began contributing to the course material with suggestions, ideas, or techniques from other martial arts. Athletes learned to handle the wooden weapons and they progressed in the relevant knowledge and skills that are part of the aikido curriculum. Except from movements, techniques and principles, students learned to endure and to come through a difficult period. In doing so, their resilience and self-determination was enhanced, which are skills that students of aikido are required to learn and make their own if they want to succeed not only in their art, but arguably in their daily life as well [Tudor, Sarkar, and Spray 2019]. From time to time, we, as teachers had the impression that the possibility to teach online and connect to the students had a symbolic value of 'participation' that was greater than the teaching of the technique itself. Students and teachers felt that they were part of a community, serving ideals that were greater than themselves.

During the period of the first lockdown as well the time with less restricted measures, the lessons were adjusted to the situation and from online we went to outdoors training. The dialogue on international fora provided a starting point how to frame the training locally. There was a clear mission to connect and care for our group members and they in turn would help support their families and/or friends. The first target was to provide a kind of steadiness and normality to hold onto during the uncertain times of the lockdown. Then priorities were set as to the content of the actual training together with the technical means to ensure that the project could be grounded and get safe roots. Various social media were utilised in such a way as to provide different degrees of connection, and closeness, and contact between students (as well as the parents of the children) and teachers and between teachers and the outside world of ex-members and other interested parties.

The training helped everyone in our group, students, and teachers, to propel forward and endure a precarious situation. The course setting and the training provided a space, as well as time, and connection to other people, even if this was mediated by technology. The group members could tap from common resources that gave everyone involved more courage and hope while it facilitated the individual coping with the situation in a decent and creative manner.

From personal observations, students who take part in online courses and are satisfied with them seem more positively oriented to the possibility of going on with the online, synchronous lessons and are also more patient with the precarious situation of the pandemic. The same pattern was observed by other teachers with whom we have contact.

When those students who had initially refused to take part in the online lesson finally did participate, they also changed their views on digital learning.

In answering the third question we posed in this essay, namely the insights gained for the future of martial arts. We have drawn several lessons approached by different angles.

Considering online training from a pedagogical perspective, the courses integrate and may offer:

Caring attitude: Central to the design of the courses during the pandemic was for us developing a caring sphere with each student and with the group to foster emotional and psychological wellbeing.

Self-determination and participation: These were cultivated as gradually the participants increasingly contributed their ideas, expertise and wishes to the training and we encouraged this attitude. On the other hand, not all our students could take part in the synchronous online training, due to the lack of technical equipment, time, or space at home. For some of them we provided the possibility to participate from a distance through relevant teaching material posted on the social media and the YouTube channel. Some of the students joined us later during the outdoor training though they had not taken part in the online lessons. Participants had the opportunity to act upon the restrictive situation and they could choose to participate in different ways or choose not to take part; in other words, students had the feeling of having control over the situation.

Solidarity: Some participants took responsibility for maintaining the aikido community and care for other individuals by offering support with technical issues and individual problems. Others shared their concerns and difficulties due to the social distancing in general, like worsened work situation or health issues.

Considering the online synchronous course from a sociological perspective, rather than knowledge of a craft, the courses are important, for they provide participants social benefits as for instance:

Social support: Providing support is a resource that individuals could use to overcome difficulties in critical or threatening life situations. Individual athletes may feel empowered and resilient.

Community: Anchoring an individual in a group and the group in a community creates a larger network from which individuals can tap resources to overcome a difficult situation creating lasting ties.

Social cohesion: Martial arts contribute to social cohesion when helping individuals and groups to manage critical situations in various ways, such as staying calm, seeking solutions to problems in a composed manner and extending a helping hand.

The above-mentioned characteristics of martial arts do not of course function seamlessly: the world is full of conflicts and the martial arts world is not an exception. However, we chose to showcase those elements that contribute to the preservation of society from a sociological perspective.

Considering the online synchronous course from the perspective of martial arts, we observed the following:

Extension of martial arts principles: The training was enriched with practices and exercises directly aimed at bringing peace to the mind and enhancing awareness. In addition, body movement that expressed flow of energy was given room in the practice. New and seasoned aikidokas attempt consciously to apply these principles in everyday life settings extending the principles of martial arts to everyday situations.

Inventing different training strategies: The kinesthetic stimuli can certainly also be used to support 'normal' training; the children even asked for it. Using optic and acoustic stimuli, exercising shadow training, and developing forms (katas) were among the positive outcomes of online training. The syllabus of aikido was modified; other elements were stressed and the syllabus was enriched in several ways.

Self-defense in aikido involves in the first instance avoiding attacks and conflicts. Following from this comes a response that it should be void of force or violence. The use of force in aikido forms only the last resort when all other preventive measures have failed. It should be also considered that even experienced athletes might have difficulties in applying a simple technique effectively under the pressure of a real attack. Physical skills, for example, such as getting out of the way of an attack by stepping back, and staying calm, being grounded, or showing a non-aggressive attitude can be exercised by individuals in remote, digital lessons [Sutton 2020]. Additionally, conflict de-escalation skills (verbal and non-verbal) could become important in our future digital as well as face-to-face aikido training.

Although the isolated training of defense movements offered an opportunity for developing competence, many teachers and students point out that this could not completely replace face-to-face contact and physical proximity. Overall, we found that learning physical self-

defense techniques to face violence in a real world can be assisted by intensive online training, because a large part of learning has to do with mastering how to move one's own body before s/he applies a technique to another person [Sutton 2020].

The argument we have put forward is that regular contact with group members beyond the digital lessons, openness, flexibility in the course design and communication played a vital role to keep the group together during the first lockdown. Contact and the online courses motivated them to keep coming back to the online lessons. Later, students followed to the outdoor, then again back to the indoor training and back to the online training again. From a pedagogical and a sociological perspective, it could be said that the online courses had an empowering effect on the group members and on group cohesion. These aspects are also supported by the disciplines mentioned in the theoretical grounding of the digital learning. In addition, the constant exchange of views between the two authors in their function as aikido teachers as well as their scientific expertise, professional attitude, and the regular communication with other Aikido teachers in Greece and Germany have benefited this project.

In relation to the future of the martial arts and aikido in particular, the pandemic poses many challenges, the most important of which – in our eyes – is to open the discussion on the mission and the social role or function we would like these arts to play when the ground on which they are based, face-to-face physical training, is not possible. In addition, the discussion shall probably open other issues like syllabus content. The work we have been doing shows that there are promising areas of development, such as restructuring the lesson from a pedagogic and didactic aspect. Furthermore, martial arts, like any human institution have a role to play in society that goes beyond becoming skillful in a craft. This 'beyond' needs to be addressed, discovered, and created.

There is a lot to be done, and certainly more research is needed on a variety of issues that arose during the pandemic, as for example to explore the situation, map the problems and solutions martial arts teachers, schools and students gave depending on context in different countries. Most aikido teachers did not take their classes online as far as we can gather from informal sources on social media. Perhaps this disheartening image changes completely if research is done to uncover the myriad ways student of martial arts keep up with training that is not visible in general and in lockdown conditions particularly.

It is also worth adding that during the second lockdown (autumn-winter 2020-2021) gradually but steadily the number of schools taking their lessons online increased. Lastly, many schools, like ours, that had

provided online training acquired new members from other countries as well. Invitations to teach in another city and forging friendships with teachers living far away became suddenly possible through the extensive use of digital technology and people changing views, attitudes, and practices. These are promising facts for the future practice of martial arts.

In conclusion, connecting with and maintaining active contact between teachers and group members, showing care and concern, going on with the training online even if circumstances or locations were not 'perfect' or 'normal' helped many individuals from our aikido community and us personally to better cope with the precarious pandemic situation.

Finally, online, synchronous lessons changed us and our training. It is a transformation witnessed by other teachers as well, one that enriches our lessons, makes us more creative in designing lessons and opens up possibilities for cooperation and training beyond borders. Martial arts may benefit from these developments, which certainly make up a rich field of study.

Dedication

To Anita Köhler (1961-2018), and to Paul Köster (1954-2021), honoured to have been your students in our history of walking the path of aikido.

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DISTRESS TOLERANCE IMAGERY TRAINING

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DOI

10.18573/mas.121

KEYWORDS

Imagery, resilience, distress tolerance,
martial arts, conflict

CITATION

Hiskey, Syd, and Neil Edward Clapton.
2021. 'Distress Tolerance Imagery
Training'. *Martial Arts Studies* 11, 46-55.
doi: 10.18573/mas.121

ABSTRACT

Martial artists often use imagery training, both for technical skill development and for managing the self and others in conflict situations. There appears, however, to be no consistent method of imaging work employed to help develop such skills.

We therefore present the PETTLEP approach – Physical, Environment, Task, Timing, Learning, Emotion, Perspective – drawn from the field of sports psychology, as a unifying theoretical framework for dynamic imagery interventions and propose a novel protocol for distress tolerance imagery work to help train martial artists in coping with stressful/conflict events. Such tools have a range of values and may be particularly important during periods when face to face, hands-on, or simulation drill training as part of martial arts practise may be impractical, such as during the COVID-19 crisis.

INTRODUCTION

Martial artists train for a variety of reasons. Attempts to delineate these have led to recent debate. Principal within this is whether it is necessary to define the martial arts or their purpose in order to practise them or conduct related studies into their nature and function. Wetzler's polysystem theory [2015] and Bowman's [2017] response to this expand on such issues in greater detail. In our experience, however, and for the purposes of this article, we refer to the tendency of many to cite their interest in practice as including the need to physically protect themselves and others in stressful/threatening encounters. Indeed, *pre*, *peri* and *post* self and other conflict management is well recognised as vital in ensuring physical and psychological safety outside of the training hall when facing the realities of street violence [Thompson 1997]. Ensuring a favourable outcome in such situations can be practised to a high level to increase the simulation fidelity, or transfer to the intended environment, of combat training [Morrison 2015] and typically involves the presence of others.

Such training is important as the defensive cascade most animals face in the presence of increasing threat has been described as successive phases of Freeze-Flight-Fight-Fright-Flag-Faint [Schauer and Elbert 2010], the latter of which are associated with a reduced capacity to defend oneself. Such emotionally driven states therefore need successfully managing to ensure a competent holistic response to any significant conflict situation. Central to this will be the need to manage the self during such times, which we explore below in relation to affording an appropriate and proportionate, ideally non-violent/peaceful, response to an aggressor.

Indeed, as Porges [2017] has noted, to respond compassionately (i.e. to reduce suffering) through de-escalating or halting the distress/aggression of another, one needs to feel sufficiently safe and grounded. This can be achieved through simultaneously encompassing the feeling of one's own bodily responses while acknowledging those of the other. Such a balanced internal state, we believe, can be cultivated so that we remain functional/responsive in the face of conflict. In doing so, we can perhaps better embody the ideals of peaceful living, mindful responding, and applying only reasonable force when threatened [Ueshiba and Stevens 1992], as enshrined in many martial arts traditions.

Although forms/kata work allow martial arts to be practised without the need for partners, many elements require the dynamic interplay between multiple parties. Restrictions on access to partners, as a result of the COVID-19 crisis, has limited our ability to train in this way. As a result, the recent global context has prompted us to consider and review the ways in which we train conflict management and specifically

whether it is possible to practise dynamic interpersonal elements of this as a solo practice.

We therefore explore the relevant literature on mental imagery training and consider the extent to which it might allow a bridge between multiple partner simulation/role play training and solo practice in the service of balanced emotional responding to conflict.

MENTAL IMAGERY

Mental imagery typically refers to internal representations and the attendant experience of sensory information without an external stimulus [Pearson, Naselaris, Holmes, and Kosslyn 2015]. Experimental research with healthy participants has shown that mental imagery has a stronger impact on subjectively experienced emotions than verbal processing alone [Hackmann, Bennett-Levy and Holmes 2011]. Similarly, participants instructed to imagine themselves in scenarios show greater changes in mood state than peers instructed to think about them verbally [e.g. Holmes, Lang, and Shah 2009]. Imagined scenes can be visualised as if through one's own eyes (known as a 'field' perspective), or from a third-party view (an 'observer' perspective). Typically, field-perspective imagery tends to have a more emotional impact than its observer-perspective counterpart. Importantly, the sense of realness of mental imagery may be enhanced through repeated rehearsal, increasing the experienced plausibility of an imagined event [Szpunar and Schacter 2013].

Imagery may allow successive practice of our responses to conflict, building up an increasingly veridical impression of this over time. This is consistent with Imagined Interaction Conflict-Linkage Theory [Honeycutt 2003], which operationalises imagined interactions (IIs) as a type of social cognition and mental imagery that serves a number of functions including rehearsal for social relating, increasing self-understanding, managing conflict and relational maintenance [Honeycutt and Ford 2001]. II conflict-linkage theory proposes that conflicts are kept alive through retroactive and proactive imagined interactions in the form of mental imagery, and that constructive conflict resolution is likely enhanced by vividly imagining more positive interactions and outcomes [Honeycutt 2003] that is best achieved through visual rather than verbal imagery [Zagacki, Edwards and Honeycutt 1992].

USES IN SPORT

Athletes regularly use imagery for both cognitive and motivational purposes, although the latter has been identified as the more common [Cumming and Hall 2002]. An important function of this can be to increase self-confidence and by extension self-efficacy. Williams and Cumming [2012] considered the relationship among athletes' sport imagery ability, their trait confidence, and their tendency to appraise situations as challenging and threatening. They measured ability to generate five differing types of imagery content: skill (e.g. correcting/adapting physical skills), strategy (devising or updating game/event plans), goal (imagining oneself winning/achieving), affect (the anticipation and excitement associated with an event) and mastery (staying confident in a difficult situation). While both skill and strategy imagery represent the ease of imaging cognitive elements of an activity, goal, affect and mastery images are related to the ease of imaging motivational elements.

Mastery and goal imagery ability positively predicted self-confidence ratings, which in turn both negatively predicted threat appraisal tendency and positively predicted challenge appraisal tendency. Moreover, challenge appraisal tendency was directly predicted (positive direction) by imaging mastery and affect imagery and threat appraisal tendency (negative direction) was directly predicted by ease of imaging mastery imagery. Such work illustrates the relevance of motivational imagery ability in self-belief and its impact on appraisal processes, thereby underscoring the need to fully assess users' abilities to image different elements and content.

Another study by the same authors [2015] then investigated whether imagery ability among athletes predicted the direction (negative/debilitative versus positive/facilitative) and intensity of their trait anxiety, and the role of trait confidence in mediating this relationship. Only mastery and goal imagery ability positively predicted confidence and in turn this negatively predicted both somatic and cognitive anxiety intensities and positively predicted somatic and cognitive anxiety direction. Put another way, mastery and goal imagery ability indirectly influenced cognitive and somatic anxiety intensity and direction via their relationship with self-confidence. To a lesser extent, mastery was also found to directly (negatively) predict cognitive anxiety intensity, as was affect (positively).

These findings underscore the importance of mastery and goal imagery ability in regulating confidence and by extension the intensity and direction of anxiety symptoms. Athletes who have the most skill in fully *seeing* themselves achieving goals and performing well in difficult situations seem most able to reduce the effects of negative images

by substituting these with more helpful, positive ones. Motivational imagery ability may then be a factor in performance and its various component skills can be targets for practice.

While athletic sports involve performance anxiety and the excitement of participation and success, the field of martial arts offers us a further context with which to consider the role of imagery, as it more closely maps onto embodied experiences of interpersonal conflict.

USES IN MARTIAL ARTS

Martial artists have been shown to use both mental imagery and self-talk as a part of their training [Devonport 2006]. In an attempt to consider the impact of these elements on the response times of trained practitioners when delivering back leg round kicks, Hanshaw and Sukal [2016] divided participants into control, cognitive-specific (CS) mental imagery, motivational self-talk (ST) and mixed CS and ST groups. They found that motivational ST, CS imagery and the combination of the two significantly reduced response times, with large effect sizes regardless of strategy.

Such findings are broadly typical and have been demonstrated by others in terms of imagery practice helping karate practitioners learning a new striking technique [Fontani et al. 2007] or specialising in forms/kata [Piepiora et al. 2017] and is also seen in the acquisition of judo techniques [Chalghaf et al. 2013]. Other work on imagery, in conjunction with muscular relaxation training, has improved the emotional intelligence of karate practitioners [Reza et al. 2020] which is felt to translate to superior technical performance in competition. However, this assertion was not explored by the study in question and so remains an untested assumption. This seems important and appears to capture the notion common in much related research, that a more general level of improved imagery skill will directly translate to practice.

Technique-based imagery work does not, however, seem to focus on the dynamic and interpersonal elements of martial arts/conflict. In contrast, a case study by Sato and Jensen [2018] is therefore helpful in this regard. It offers a reflection on mental preparation for a national kendo competition and included a focus on educating and assessing the practitioner's imagery training needs, teaching mental skills and applying them in context (importantly this applied to specific kendo drills as practised with the sports trainer) and evaluating both mental skills ability and kendo technical improvements. Performance, development and improvements were noted through observations by others, by the imager's own proprioceptive feedback, by exploring

video playback of his performances and via comments from peers who had trained with the practitioner over a long period. He also did well in competition, believing his mental imagery and preparatory training to be important in this, recognising the interlinked nature of the physical, technical, and mental aspects that had been imaged and practised.

At a group level, however, it has recently been shown that taekwondo fighting in training does not successfully simulate the emotional and cognitive demands of competition. In a novel study aimed at enhancing practice design to facilitate transfer to its intended environment [Maloney et al. 2018] explored the representativeness of cognitions, affect, actions and interpersonal behaviour of practitioners fighting in training and fighting in competition. Using a complex series of quantitative and qualitative measurements, fighters in training demonstrated fewer attacks, initiated attacks from greater distance and were more predictable in their movements than when fighting in competition. They also exhibited lower anxiety, arousal and mental effort and in self-confrontation interviews of video replays of fights reported less pressure, arousal and sense of mental challenge. Such findings underscore the complexity of matching training to the demands of live competition, leading the authors to suggest that to be representative practice outside of its intended arena needs to include fully modelling the cognitions and emotions of competition to better enhance transfer.

Sparring in traditional forms of combat (such karate, taekwondo, kung fu) typically involves a restrictive series of movements and attendant rules to encompass each respective styles' agreed in-fight manner of engagement. In contrast, mixed martial arts (MMA) has been the subject of increasing research over recent years and arguably simulates a more intense, multi-range, comprehensive experience of fighting. Of course, neither can claim to fully simulate the experience of a non-consensual real-world violent encounter [Miller 2008].

Jensen et al. [2013] explored the experiences of MMA practitioners and noted the most important element of the descriptions they obtained seemed to point to the chaotic nature of MMA fights. Characterising this as 'cage reality' the authors cite fighters' beliefs that their arousal (see physiological and emotional) regulation skills are *at least* as important as their technical ability for success. Participants also noted that 'cage reality' differs markedly from typical training. However, as Bowman [2014] points out, 'reality' in terms of martial arts practice is experientially driven and therefore highly a subjective/perspectival term [see also Downey 2007].

Others, [e.g. Staller, Zaiser and Körner 2017] suggest we should abandon the use of imprecise multidimensional terms such as 'realism'

and 'reality-based' as their use may inadvertently confound the design of relevant training procedures and environments. They argue for a shift in emphasis from realistic to representatively designed testing environments, which might provide instructors/trainers with more precise tools to consider the inevitable trade-off between representativeness and practitioner health and safety when training, for example, self-defence skills. Staller et al.'s [2017] Trade-Off Model of Simulation Design is one attempt to bridge this gap. In keeping with such a position, adaptations to training environments and training kit continue to evolve over time to reduce the gap between ethically impossible and viable simulation training [Miller 2008; Morrison 2015].

Practical implications of Jensen et al's [2013] work seem to be that simulating the intensity of competition-based fight conditions may be difficult during training. However, any procedures or activities that provide practitioners with the chance to enhance the rapidity with which they are able to adapt their in-fight strategies and actions to the situation at hand, in keeping with the chaotic MMA arena, could be helpful. Jensen et al. [2013] suggest that the use of a random practice scheduling, to challenge a practitioner's ability to read others and react to a variety of scenarios and possible situations may help in this regard but as yet this assertion remains to be empirically tested.

Those training practitioners in such circumstances might focus on attention to changes in experienced arousal during training sessions and develop various strategies for heightening or reducing this in response to the evolving requirements of the encounter. All of this might be trained using both actual and imaged sessions. Trainers are also advised to help increase practitioners' awareness to the physical elements of a competition (e.g. blows landing), their perceptions of their opponents, and the pre-competition impact of their connection to the audience, all of which might be expected to affect levels of arousal and so performance, so that effective preparation can be fully imaged and successively practised.

MMA fighters, however, develop different strategies with which to manage or renegotiate the physical force and violence they experience [Andreasson and Johansson 2018]. Many seem to involve avoidance, a downplaying of, or the re-negotiation of violence to something understood as part of an entertainment spectacle and competitive sport. Practitioners know the damage they might deliver or sustain is real with the potential to have a considerable impact upon life, body and self. The emotional management of their fear, to stay physically safe but also perform well for an audience as part of an embodied [see Spencer 2013] form of global sport and physical culture, seems to mean that managing emotions within this unique arena may play a central role in MMA.

Imagery therefore does seem to be ubiquitous in various forms of martial arts practice. However, there seems to be no consistency as to the specific mode used or methodology employed. As a result, we turn to a model which has been developed to overcome such issues across sporting arenas.

THE PETTLEP APPROACH AND LAYERED STIMULUS RESPONSE TRAINING

Holmes and Collins [2001] developed the Physical, Environment, Task, Timing, Learning, Emotion, Perspective (PETTLEP) approach as a theoretical framework for the effective execution of imagery interventions. It was conceived of as an alternative to the relatively inert (e.g. laying down or seated) manner in which imagery work among sportspeople was typically carried out. It features the seven elements the authors argue are minimum requirements needed so that imagery work substantially maps onto (i.e. is functionally equivalent to) the skills to be honed, in order to maximise the efficacy of an action or performance.

Collins and Carson [2017] have noted that the PETTLEP approach has gained support in a wide range of sporting endeavours such as golf [Bernier and Fournier 2010], gymnastics [Battaglia, et al. 2014], volleyball [Afrouzeh, et al. 2013] and football penalty taking [Bjorkstrand and Jern, 2013] as well as in musical instrument practise [Wright, Wakefield and Smith 2014] and upper limb rehabilitation [Harris and Herbert 2010]. In terms of its application, Wakefield and Smith [2012] emphasise the importance of trainers developing a strong working relationship with an athlete when using imagery work and that such practices are introduced and rehearsed thoroughly prior to independent use. They suggest that PETTLEP imagery may be a viable alternative to the performance of a skill in situations where further physical practice or the real-time experience is not possible or indeed advisable (for instance, during COVID-19 social distancing restrictions). They helpfully go on to summarise a series of key recommendations of how to apply the PETTLEP model, which we have adapted for use in terms of distress tolerance and the successful management of interpersonal conflict below.

Although skill in imaging develops with practice, more recent advancements in applied imagery work come from Cumming et al. [2016] who have developed a practical guide to layered stimulus response (LSRT) training. They note that while natural imagery ability is variable in the population, poor imagery skill can potentially hamper an athlete's development and progression in their chosen sport. They cite that those who struggle usually report either being unable to

generate and maintain their desired/favourable image and/or they seem to struggle to either *eliminate* or control undesirable content. Identifying those who may need help in either area may be important, as such athletes may be either less likely to use the imagery methods or simply use them ineffectively. LSRT can therefore be an adjunct to PETTLEP training.

LSRT aims to help users better generate and control their experience of imagery by adding three components in successive layers of information. Stimulus information features sensory components of the image, response information contains the imager's associated emotional and physiological reaction to the image and meaning information represents how the image is interpreted (e.g. as anxiety or energy-provoking, challenging or threatening, or helpful versus unhelpful). Images are grouped according to these differing components before being slowly brought together in layers with increasing detail and richness. Each successive layer involves a cycle of image generation, rating and active reflection on the contents and characteristics of the image, and then reiteration or subsequent development (whereby further content is added as needed). In-practice image development targets both the content and manner in which the imagery is performed (i.e., the process of imaging) and layers evolve over time. Greater control over imagery is felt to occur by explicitly bringing attention to four processes of image generation, inspection, transformation and maintenance [Kosslyn 1995] over time.

DISTRESS TOLERANCE IMAGERY PRACTISE FOR MARTIAL ARTISTS

Given the above, we have developed a PETTLEP-informed imagery protocol to enhance distress tolerance and skilful responding for martial artists (see Table 1 overleaf). Its application can be further enhanced with attention to the LSRT method outlined above, to ensure that the vividness and clarity of the image can be maintained (given the potential introduction of so many elements at once) through the use of appropriate layering. Note – the protocol is conducted with a focus on compassionate conflict resolution for both student and aggressor throughout.

For example, a student might image (or remember) a perceived threat or confrontation and layer increasing levels of their emotional distress, their visceral reaction to this and their in-vivo appraisal of the meaning of the event, as they practice tolerating and then compassionately and authoritatively de-escalating the situation.

	How can this be achieved?	Examples
Physical	The practitioner/student should adopt the correct stance, wearing the same clothes and holding any implements that would be present.	They could image standing or sitting in a typical posture, dressed in the clothes they would usually wear. They could image their positional response to the threat/emerging conflict.
Environment	The practitioner/student should complete the imagery in the same environment where the conflict could take place. Where this is not possible, videos, photographs, or a similar environment can be used as a substitute.	They could image while in the dojo/training hall/street, from the first-person or an observer perspective.
Task	The threat/conflict being imaged should be identical in nature to the practice actually being performed, and this should be altered as the skill level of the practitioner improves.	They would mimic their desired peaceful/resolution-focused response during the encounter, in keeping with the specific nature of the conflict (e.g. maintain distance, verbal defence, posturing up, etc.).
Timing	The imagery should be completed in 'real time' and should take the same length of time to complete as the event.	They would image a conflict in real time, rather than in slow motion. Research has shown that real-time imagery is aided by holding implements associated with such events (e.g. a bag or phone) to include shifts in use.
Learning	As the practitioner/student becomes proficient and autonomous at the task, the imagery should be updated in order to reflect this learning and remain equivalent to the complexity level of the practice.	They would update the imagery to reflect the specific conflict that they were working on. Also, they might focus on more refined elements of their response when becoming increasingly competent.
Emotion	Any emotions associated with conflict should be incorporated into the imagery. This can be aided by the use of layered stimulus and response training (LSRT, as outlined above).	They would include all emotions, specific to the experience of conflict and their ongoing response to it (for example, fear, anger, embarrassment, shame, etc.).
Perspective	The imagery should usually be completed from an internal perspective (i.e. through the practitioner/student's own eyes). This can be aided by the use of video. However, external imagery may be useful for some events and personal preference should also be taken into account.	They would image from a field perspective when responding to a conflict. They may also image their response to the event from an observer perspective, as how this looks to the aggressor is important and it would allow the practitioner/student to image the dynamic more fully.

Table 1:
Protocol for implementing a PETTLEP informed distress tolerance imagery intervention (based on Wakefield and Smith [2012])

Particular attention might be paid to the facial expression, vocal tone and active listening one might employ during conflict as all of these skills seem implicated and affected by one's experience of safety [Porges 2017]. This can be undertaken by imagining, embodying and enacting one's ideal response to specific levels of threat/conflict events, as it has been shown that even relatively short compassionate imagery inductions can increase one's abilities to be empathic, insightful and feel better able to cope in the face of difficulties [Gilbert and Basran 2018].

Please note, however, that imaging work should *not* be used in relation to a previous encounter which is linked to current intrusive re-experiencing (e.g. repeated disturbing unwanted memories, dreams, flashbacks or marked reliving of the event), considerable avoidance behaviour (e.g. attempts to consciously avoid reminders or discussing what happened), altered thoughts and beliefs (e.g. unrealistic of global evaluations of threat that others would not share, considerable self-blame) or hyperarousal (e.g. super-alert, watchful or on guard, jumpy or easily startled). In such cases there should be a consultation with a general practitioner (i.e. family doctor) and as needed a referral for screening/a suitable assessment of mental health needs [see NICE. Post-traumatic stress disorder Guideline 116, 2018]. The imaging work we propose in this article is in the service of heightening resilience and responses to threat cues in the absence of a posttraumatic response, rather than a replication of exposure based psychological therapy/reliving as part of a clinical treatment/plan of care.

DISCUSSION

Our exploration of the related literature suggests that imagery work may have much to offer those needing to skilfully respond during a threatening/conflictual encounter. We present a distress tolerance imagery protocol as an applied form of internal representation development, to help this process. We believe its use can help entrain the self to respond compassionately to reduce conflict, when we are able to avoid violence, during situations that provoke relational/physical threat. The work we have explored suggests practising mastery (i.e. confidence) and goal-based (i.e. achieving a specific aim) imagery can help with both threat appraisal and anxiety intensity. As such, seeing oneself doing well is helpful in terms of self-management under duress and can be practised as a solo drill in the absence of suitable training partners.

In terms of next steps, future development work might first establish the lived experience of implementing the intervention and whether it is felt to be both feasible and acceptable within martial arts practice. For

example, it may be possible to practise an entirely peaceful resolution to an imaged conflict, a difficult but managed peaceful resolution to the same conflict or a necessary physical but minimally harmful resolution following escalation to the conflict. In this way the PETTLEP approach has the potential to be highly flexible. It can also allow the teacher to work with the student at a personalised level, taking into consideration the student's existing imagery ability (by conducting a baseline visualisation) and fine-tuning those areas most in need of development (i.e. whether skill, strategy, affect or mastery elements need preferencing)

Assuming the approach is felt to have merit, then further research would be needed to explore its effectiveness from the perspective of both student and teacher. Within this might be the need to examine teachers' abilities to employ imagery work themselves and whether specific training in this regard, to teach others, would be needed. Finally, we feel it important to state that imagery work as presented here is intended as an adjunct to competent, aligned, ongoing martial arts instruction within the context of an existing supportive student/teacher relationship. We know that who teaches what has an impact on the experience of martial arts training [Barnfield 2003]. As a result, if managed appropriately we believe the PETTLEP approach has the potential to serve as an important tool through which to better tolerate the distress of relational conflict in both oneself and the other.

Ethical Statement

The authors have abided by the Ethical Principles of Psychologists and Code of Conduct as set out by the British Psychological Society. No ethical approval was needed in preparing this article.

Competing interests

The authors have no competing interests to declare.

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MEXICAN CAPOEIRA IS NOT DIASPORIC! ON GLOCALIZATION, MIGRATION AND THE NORTH-SOUTH DIVIDE

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DOI

10.18573/mas.122

KEYWORDS

capoeira, glocalization,
diaspora, North-South divide,
bodily capital

CITATION

Contreras Islas, David Sebastian.
2021. 'Mexican capoeira is not diasporic!
– On glocalization, migration and
the North-South divide'. *Martial Arts
Studies* 11, 56-70.
doi: 10.18573/mas.122

ABSTRACT

This paper contributes to the understanding of martial arts globalization processes. It focuses on the development of capoeira in Mexico, which is presented as an example of glocalization. In contrast to the diasporic capoeira observed by Delamont and Stephens in the UK, capoeira in Mexico is characterized by the proliferation of local groups with classes taught by Mexican instructors, as well as by advanced cultural reinterpretation. To explain these differences, capoeira is considered as the bodily capital of Brazilian migrants whose mobility patterns are influenced by the North-South divide. This paper hypothesizes that glocalization processes similar to Mexico's might exist throughout Hispanic Latin America and other regions of the Global South. Furthermore, the diaspora-glocalization divide could be a pattern in the globalization process of practices that originated in the South which spread as part of migrants' bodily capital. Finally, I ask how capoeira's globalization in Mexico might anticipate similar processes in the global North.

INTRODUCTION

Capoeira is a complex Afro-Brazilian practice that combines elements of dance, fight, music, theater, and lyric (among others). Defying traditional western genre categories, scholars like Lewis [1992] and Downey [2005] have classified it as a 'blurred genre' [Geertz 1983]. However, capoeira practitioners (*capoeiristas*) refer to it as a game (*jogo*) and to themselves as players (*jogadores*). After being heavily persecuted in most of Brazil because of a mixture of racial prejudices and its actual relation to criminal organizations, capoeira was declared Brazilian cultural heritage in 2008 and listed by UNESCO as intangible cultural heritage in 2014. Today, capoeira is a global phenomenon practiced by people all over the world. As such, it has become an important subject for academic research in a variety of disciplines, from history and cultural sociology to sport pedagogics and even neuropsychology.

Most academic research in capoeira has focused on understanding the practice as it is lived in Brazil. Nonetheless, as a Mexican scholar and capoeira teacher (*professor*), I am particularly interested in understanding the dynamics of capoeira outside Brazil: the way it has spread to other countries, how it is taught and by whom, and the overall experience of people learning and playing abroad. This research interest coincides with the work of other scholars including Joseph [2008a; 2008b; 2012] in Canada, Reis [2005] in Poland, Aichroth [2012] in Germany, Lube Guizardi [2013] in Spain, Lipiäinen [2015] in Russia, De Martini Ugolotti [2015] in Italy, and Wulforth, Rocha & Morgan [2014] in Australia.

Still, the present article was in large part inspired by the work of Delamont and Stephens, who have spent almost 13 years analyzing capoeira in the UK and other regions of the Global North using a two-handed ethnography approach. In one of their early papers [Stephens & Delamont 2008: 58], they introduced the notion of *diasporic capoeira*, which became a central element in their later works and a reference to many other scholars [see: Joseph 2012; Rocha et al. 2015; Wulforth, Rocha & Morgan 2014; Aula 2017]. They mention three main aspects of diasporic capoeira that distinguishes it from glocalized practices (like hip-hop):

Firstly, capoeira is spread by the migration of Brazilian teachers. Thus the capoeira in Newcastle, Tokyo and Frankfurt is taught by Brazilians, as it is in Rio. Secondly, the language of capoeira remains Brazilian Portuguese, as students from Newcastle, Tokyo and Frankfurt sing the same songs and learn the same vocabulary as those in Rio. Thirdly, the core aspects of the habitus of capoeira outside Brazil are presented to the students as inalienably and inexorably Brazilian. [Stephens & Delamont 2008: 61]

In the same paper, the authors claim that 'as long as the teachers are expatriate Brazilians, and the schools have Brazilian roots, the glocalization of capoeira is restricted' and that 'once teachers indigenous to the UK, Japan and Germany emerge, and hybrid forms evolve, capoeira will become more glocal' [61-2]. In a later work Delamont, Stephens, and Campos [2017: 166-67 & 172-73] continue to analyze the possibility of capoeira glocalizing in the UK, 'as opposed to the diasporic capoeira we see today' [167].

Nevertheless, capoeira's development in Mexico does not fit the model of diasporic development that the authors outline in their treatment of 'capoeira classes across the world' [Stephens & Delamont 2008: 60]. Instead, the Mexican experience seemed closer to glocalization, as depicted by Bennett [1999a; 1999b] and Condry [2000; 2001] for the case of hip-hop. Although Joseph [2008b], Lipiäinen [2015] and Wulforth, Rocha and Morgan [2014] have pointed out similar tendencies to glocalization in their countries, the Mexican case is more radical since Brazilians neither introduced capoeira to the country nor dominated the local market.

The central thesis I will try to sustain, is that capoeira has followed different patterns of globalization in the North and in the global South, adopting the form of a diaspora in the first case, while tending towards glocalization in the second. To this aim, the following article will analyze the historical development and the present shape of capoeira in Mexico to show why it should be considered a glocal instead of diasporic phenomenon. I will also reflect on the implications of this finding for our understanding of the globalization processes of social practices across the North-South divide more generally. By integrating this perspective, my work aims to contribute to the understanding of martial arts globalization processes.

The article has been organized into five sections, plus a brief conclusion. It starts with an introduction to capoeira, which familiarizes the reader with the basic features of the Afro-Brazilian practice. The second section expands on the concepts of glocalization and diaspora, as well as the criteria used by Delamont and Stephens [2008] to sustain the diasporic shape of capoeira's globalization process. These concepts are fundamental to the third section, which presents historical and more recent data on the Mexican case, to analyze whether its shape corresponds to a diasporic or a glocal activity. It finds that notions of glocal capoeira better describe the Mexican case than the diasporic model.

The fourth section provides evidence of similar glocalization processes existing in other countries of Latin America. Using De Sousa Santos's [2006] decolonial theorization on the North-South divide, in combination with Wacquant's [1995] concepts of bodily labor and

bodily capital, I present one possible explanation of the different shapes of the practice found in Europe and Latin America. Furthermore, this suggests that the divergent patterns of globalization observed in the case of capoeira might be generalizable for other cultural expressions that originate in the Global South and travel the world as part of migrants' bodily capital.

The article's final section addresses the question posed by Delamont, Stephens, and Campos [2017] regarding the possibility of diasporic capoeira glocalizing in the UK. Inverting the colonialist chronology that associated the South to the past and the North to the future [De Sousa Santos 2006], I analyze to what extent the glocalization of capoeira in the Global South might help to anticipate and inform a similar process in the North.

THE PRACTICE OF CAPOEIRA

By combining dance with struggle, ritual with spontaneity, beauty with violence, and play with deadly seriousness [Onori 2002: 9], capoeira escapes every attempt at classifying it into traditional western genres. This article, however, approaches capoeira as a social practice [Schatzki 2002], or, to speak with Alkenmeyer [2013], as a 'socially regulated, culturally typified and organized bundle of human activities that unfold in time' [44]. As subjects of a social practice, capoeiristas incorporate, produce and reproduce a particular habitus [see: Alkenmeyer 2013: 42] that, given the appropriate conditions, can become a form of bodily capital [Wacquant 1995].

The historical origin of capoeira is the subject of intense debate within and outside the academic world. The two main theses on the subject assume that (a) it originated in Africa and was imported into Brazil through slave trading; or (b) it originated in Brazil, through the interaction of enslaved Africans and their descendants with European slave-owners and native *indios*. A relation of the arguments and counterarguments presented by each side can be found in the works of Assunção [2005], Talmon-Chvaicer [2008], Delamont, Stephens and Campos [2017: 84-8] or Varela [2019: 17-23]. Nevertheless, both positions concur that the history of capoeira is inseparable from the history of slavery in Brazil.

From 1800 on, references to capoeira depict a particularly violent past, linking the practice to the urban gangs (*malts*) that terrorized the cities of Recife and Rio de Janeiro. Surprisingly, the first records of mixed-raced white *capoeiristas* stem from this period – some of them attesting to the popularity of capoeira among the very police forces that were to persecute it after its illegalization in 1892 [see: Capoeira 2002: 145-164].

Persecution caused capoeira to practically disappear from most urban centers, with the notable exception of Salvador and its surroundings in the state of Bahia, where its practice subsisted in the folklore of the Afro-descendant population [see: Lewis 1992: 51-59]. Around 1930, in Salvador da Bahia, capoeira was subject simultaneously to a rebirth and a transformation through the innovations introduced by Manoel dos Reis Machado (*Mestre* [master] *Bimba*) and Vicente Ferreira Pastinha (*Mestre Pastinha*), which brought it closer to its current form.

Traditionally, capoeira was either learned in the streets, by attending clandestine rings (*rodas*) and trying to imitate the movements, or it was passed from master to disciple in a very personal way. This changed when Bimba opened the first capoeira academy (*academia*) in 1927, announcing his classes as '*luta regional bahiana*' (regional fight of Bahia) to avoid being persecuted by the police.

Aiming to give capoeira a formal status, similar to that of East Asian martial arts, Bimba developed the fighting aspects of the practice, introduced the use of uniforms and graduations, and developed a sequence-based teaching method that allowed his students to graduate within six months [Capoeira 2002: 179-182]. Bimba also required all his students to prove that they were studying or working, in addition to paying a monthly fee. As a result, many of his students were young white or mixed-raced people who belonged to the economic elite. Over time, some of Bimba's students came to hold important positions in the government or in the universities, from where they contributed to the legalization of capoeira in 1937, as part of the project of President Getúlio Vargas to forge a new national identity [Lube Guizardi 2011].

Despite these achievements, some Brazilian intellectuals accused Bimba of 'whitening' capoeira, and they worked together with other masters in the Bahia region to give birth to the style known as '*capoeira Angola*' or '*capoeira de Angola*', which sought to highlight the practice's African roots. In contrast to the pugilistic efficiency of Bimba's capoeira Regional, capoeira Angola cultivated a less direct fighting style, based on cunning rather than force, and emphasized the ritual and musical aspects of the practice. Although its followers held (and still hold) a traditionalist discourse, capoeira Angola incorporated many of the innovations introduced by Bimba, such as the use of uniforms and the sequence-based teaching. Pastinha, perhaps the most representative *mestre* of capoeira Angola, opened his own academy in 1941, following Bimba's initiative to take capoeira off the streets.

While capoeira Regional had an explosive growth throughout Brazil and established schools abroad in the early 1970s, capoeira Angola remained endemic to Salvador until the late 1980s [Varela 2017]. Lewis [1992] attributes the recent expansion of the Angola style to its rediscovery by black US-American *capoeiristas* that traveled to Bahia

looking for the ‘ancestral roots’ of the game. Ultimately, the encounter between Angola and Regional has given rise to a third eclectic style sometimes called ‘*atual*’ [Lewis 1992] or ‘contemporary’ [Browning 1995; Delamont, Stephens & Campos 2017; Varela 2017; Pérez Falconi 2013].

All three styles of capoeira have made their way into gyms, cultural centers and fitness studios all over the world – not to mention its appearances in videogames, movies and marketing campaigns. However, *academias* remain the emblematic space to learn, especially if one aspires to become a ‘serious’ adept [Lewis 1992: 67]. Academies are enclosed spaces – equivalent to a dojo or a gym – where one or more instructors give classes. Instructors or teachers in an *academia* are usually masters (*mestres*) themselves, or work under the supervision of a *mestre*. However, some teachers might open an academy without a *mestre*’s authorization.

Lewis [1992], Downey [2005], Joseph [2008a; 2008b], Delamont, Stephens and Campos [2017], and Perez Falconi [2013], among others, have described the structure of capoeira classes in Brazil, Canada, the UK and Mexico. In all these cases, the structure is relatively similar, consisting of a warm-up followed by individual drilling of movements, which are assembled into sequences, and further drilled in pairs. To train improvisation, classes usually end with some ‘routine’ games in a small capoeira ring (*roda*). The total duration of the classes is also similar, varying between 60 and 90 minutes.

The main objective of the classes, and of the training in general, is to prepare the students for the capoeira-game, which takes place in the ring (*roda*). The *roda* is a circular space, generally delimited by the bodies of the participants who switch roles as musicians, choristers, spectators and potential players. At one end of the perimeter is the orchestra (*bateria*), composed of various percussion instruments led by a musical bow called *berimbau*. While singing, clapping hands or playing an instrument, participants wait for their turn to occupy the center of the *roda*, where they build a beautiful (though violent) bodily dialogue simultaneously with a partner and with the orchestra.

To participate successfully in the *roda*, a capoeirista must acquire and assimilate various skills. For example, Rosa [2015] describes the importance of moving and articulating the body in polyrhythmic patterns connected through serpentine movements of the spine, producing what she calls ‘*ginga* aesthetics’. Downey [2002; 2005; 2012], on the other hand, emphasizes the need to train the sense of balance to hold the body in the handstand, as well as to develop a form of synesthetic perception that associates the sounds of music with the experience of movement. For Delamont and Stephens [2014;

with Campos 2017], these changes go much further, and may include behaviors that take place outside the *roda* – such as the act of dancing in a nightclub. These and other elements can be considered components of the habitus [Wacquant 2004; 2011; 2014] of the capoeira practice, and as potential forms of its specific body capital [Wacquant 1995].

GLOCALIZATION, DIASPORA AND DIASPORIC CAPOEIRA

The concept of globalization has been the subject of a long academic debate that would be impossible to reproduce here.¹ At the risk of oversimplifying, I will treat it as a process of integration and construction of (inter)regional or planetary networks of economic, political and cultural interactions [Roudometof 2014]. In general, the Eurocentric tradition considers that globalization began around 1500 CE, with the colonization of America and Africa and the triangular trade between both continents and Europe. However, authors like Assunção [2005] and Roudometof [2014] criticize the Eurocentric view because it does not allow the addressing of previous phenomena (e.g., the Silk Road) as part of globalization.

Following this idea, Assunção [2005] proposes complementing the globalization discourse with the concept of diaspora, understood as the dispersion of a human community that gives rise to a plurality of communities, established in different countries, which share (and recognize) a common origin. Particularly, ‘a diaspora presupposes the existence of a real or imaginary homeland to which its members aspire to return’ [Assunção 2005: 212]. Contrary to the Eurocentric tradition, Assunção considers that the combination of globalization and diaspora provides a better understanding of massive migration phenomena, where people mobilize and settle outside their home country, like the massive displacement of African people in the context of slave trading that gave birth to cultural expressions like capoeira, hip-hop, or jazz. In addition, Rocha and her team [2015] have noted that ‘diasporas keep network ties with the homeland and use the network to support new members’ [406]. The role of diaspora for globalization has also been a central topic in the works of authors like Appadurai [2008] and Cohen [2008].

Another point of debate within globalization theory has focused on questioning its supposed homogeneity and homogenizing effects. In contrast to this idea, Roudmetof [2014], Ritzer [2003] and others have pointed out that globalization implies continuous processes of cultural

1 For an overview see Antonio and Bonnano [2000].

reinterpretation, decoding, and incorporation. This perspective, which resembles the concept of creolization used by Lipiäinen [2015] to analyze capoeira in Russia, contravenes the simplistic vision of homogenous-homogenizing globalization, replacing it with a dispersive adaptation movement where diversity emerges in the intersection between the global and the local. To capture this dynamic, Robertson [1995] introduced the concept of glocalization, meaning the interpenetration of the global and the local that gives rise to unique results in different geographical areas.

Based in both Assunção's perspective on diaspora and Robertson's concept of glocalization, Delamont and Stephens [2008] argue for a diasporic globalization of capoeira in the UK. To support their argument, the authors compare their observations on capoeira with two examples taken from ethnographic literature: tango and hip-hop. According to Delamont and Stephens [2008], the case of hip-hop is representative of glocalization, insofar as it was 'moving away from its Afro-American roots' [61]. As an indicator of this 'moving away', the authors mention the proliferation of local hip-hop bands that compose new lyrics talking about local problems in the local language, as reported by Bennett [1999a; 1999b] and Condry [2000; 2001] in Newcastle, Frankfurt, and Japan.

On the contrary, they consider the case of tango to be an example of a diasporic process, insofar as it 'is taught by Argentineans, who can recreate authentic *milongas* (dance halls). The songs are sung in Spanish, and the teachers are the self-exiled and the expatriates, who have the Argentinean equivalent of *saudade* [i.e. nostalgic longing or affection for home]' [Stephens & Delamont 2008: 61, emphasis in the original]. To support this, they refer to the research conducted by Savigliano [1995; 1998] in Japan and Viladrich [2005; 2006] in New York.

Based on this conceptual framework, Delamont and Stephens [2008: 61] will consider a practice's shape diasporic if:

1. it is spread and taught by migrants of the practice's land of origin,
2. it preserves its original language, which is learned by adepts abroad, and
3. the teachers use authenticity discourses [Joseph 2008b] to link the practice's habitus inexorably to its land of origin.

In contrast, based on the hip-hop example, a glocalized practice would show:

- a. proliferation of local groups, not linked to its land of origin;
- b. use of the local language within the practice (e.g., singing hip-hop in German, rather than English); and
- c. reinterpretation or 'creolization' [Lipiäinen 2015] of the practice to express local meanings [e.g., using hip-hop to talk about the problems of communities in Germany, Japan, or the UK].

Following these criteria, and based on 13 years of ethnographic research observing and documenting capoeira classes and events in the UK, New Zealand and Canada, the authors conclude that 'capoeira classes across the world are taught by expatriate, self-exiled Brazilians to students who are enrolled into 'schools' of capoeira that are still based in Brazil' [Stephens & Delamont 2008: 60]. Consequently, they choose the term diasporic capoeira to describe a globalized practice where 'the teachers are Brazilians, who express *saudade* (nostalgic, homesick longing) for Brazil, and present themselves to their students as self-exiled, nomadic Brazilians' [2008: 60, emphasis in the original]. Within the field of Brazilian martial arts, Rocha et al [2015] use similar arguments to compare 'diasporic' capoeira with 'glocalized' Brazilian Jiu-Jitsu.

Without a doubt, the notion of diasporic capoeira introduced by the authors has proven to be a useful analytical resource, as shown by their fruitful research. Additionally, the ethnographies of Joseph in Canada [2008a; 2008b; 2012], Reis [2005] in Poland, Aichroth [2012] in Germany, and Browning [2015] and Downey [2008] in the United States, seem to confirm the universality of the diasporic shape proposed by Delamont and Stephens. Nevertheless, all the countries mentioned above are part of the Global North, a concept that comprises the geographical regions that have taken advantage of capitalist modernity [Marini 1973; De Sousa Santos 2006]. To prevent the normalization of colonial, Eurocentric generalizations, this article considers how capoeira has spread and developed in the Global South rather than simply assuming the universal validity of the diasporic model.²

Keeping this in mind, let us now analyze the situation of capoeira in Mexico.

2 Even within the North, the diasporic shape of capoeira is challenged to different degrees by the observations of Joseph [2008b], Lipiäinen [2015] and Wulfhorsts, Rocha & Morgan [2014].

THE SHAPE OF MEXICAN CAPOEIRA

This section illustrates the limitations of ‘diaspora’ in apprehending the forms of capoeira adopted in Mexico and other regions of Latin America. It begins by briefly reconstructing the first ten years of capoeira in Mexico, followed by a general analysis of the current form of the practice in the country. Finally, it highlights some examples of cultural reinterpretation/creolization. Gathering this evidence together, it argues for the existence of a glocal-shaped Mexican capoeira.

To reconstruct the history of capoeira in Mexico, I rely on the work of Adolfo Flores Ochoa [2000] and Sergio González Varela [2017; 2019]; a database of Mexican capoeira groups, gathered independently by Marcos Fernández Vera (*Contramestre Bateria*) in 2012; some interviews conducted for the podcast Divagar Radio³ between 2017 and 2018, and information posted on capopedia.org.mx.⁴ I also draw on my experience as a teacher (*professor*) of contemporary capoeira and 18 years of membership in the group *Longe do Mar*. Readers should thus consider themselves warned as to possible sources of bias that may arise from my personal involvement with the research subject.⁵

The first recorded capoeira workshop in Mexico took place in 1992 at the Antiguo Colegio de San Idelfonso, part of the Escuela Nacional de Danza, in Mexico City [Flores Ochoa 2000: 15]. Due to the lack of any previous records, this suggests that capoeira may have arrived in the country about 28 years ago. It should be noted that this first workshop was not hosted by a Brazilian teacher, but by an Argentinean: Mariano Andrade, known today as *Contramestre Manhoso*, a former pupil of *Mestre Yoji Senna* in the city of Buenos Aires [Flores Ochoa 2000].

For several Mexican students this workshop was their first contact with capoeira. After falling in love with the practice several decided to attend the First International Capoeira Encounter organized in 1992 by *Mestre Acordeon* (Bira Almeida), in San Francisco, California. One of the attendees of that event was Adolfo Flores Ochoa, today known as *Mestre*

Cigano. In an interview for Divagar Radio, he states: ‘what I saw at that moment in San Francisco made me decide that ... I didn’t know, I didn’t understand absolutely anything ... But that’s what I wanted to dedicate the rest of my life to’.⁶

In 1995, Andrade and his students founded Ollin-Bao, an independent dance group that explored Afro-Latin music and dances (including capoeira). In 1996, Ollin-Bao became Banda do Saci, the first capoeira group in Mexico City, which is still active [Flores Ochoa 2000]. Meanwhile, Victor Montes, today known as *Contramestre Tequila*, returned to Mexico after training in Brazil with *Mestre Squisito*. He opened a local branch of the group Terreiro do Brasil in the city of Guadalajara in 1995.⁷ A third entry point for capoeira into Mexico occurred in the city of Xalapa. Again, this was not led by a Brazilian teacher. Rather, in this case the leading figure was a Japanese (*instructor Japão*) from the *Cativeiro* group, who arrived at the Universidad Veracruzana in 1998.⁸

The first capoeira *mestre* to visit Mexico was *Delei*, founder of the *Abolição* group in the United States, with whom Andrade organized the first graduation ceremony (*batizado*) in 1994 [Flores Ochoa 2000: 15]. A few years later, in 1997, Banda do Saci organized a workshop with *Mestre Curió*. After this visit, the group led by Andrade decided to subscribe to capoeira Angola, with *Curió* supervising their work from Brazil. Dissatisfied with the decision, Adolfo Flores, Rosalinda Perez, and Iñaki Garrido separated from Banda do Saci in 1998 and founded *Longe do Mar* as an independent project to continue exploring various styles of capoeira [Flores Ochoa 2000]. Alejandro Ruiz, another of Andrade’s pupils, also left Banda do Saci to open a local school of the *Escola de Capoeira Angola Irmãos Gêmeos* (ECAIG, the group of *Mestre Curió*) in Mexico City [see: Varela 2019: 117].

The First National Encounter of capoeira, organized jointly by *Longe do Mar* and *Terreiro do Brasil*, was held in the city of Guadalajara

3 Divagar Radio was an internet radio program about capoeira in Mexico that was on the air from 2017 to 2018, transmitted live through <https://www.circovolador.org/>. The first program aired on February 7, 2017. All programs can be heard free at https://mx.ivoox.com/es/podcast-divagar_sq_f1385779_4.html (Accessed 4 June 2020).

4 Created in 2018, Capopedia is a collaborative repository of information about capoeira in Latin America inspired by the Wikipedia model, available at: <http://www.capopedia.org.mx/> (Accessed 4 June 2020).

5 On the analytical implications of positioning oneself within one of these styles, see: González Varela [2017: 46-53] and De Brito [2016].

6 Adolfo Flores Ochoa [Guest] [2017] Divagar Radio [Podcast]. February 15. Available at: https://mx.ivoox.com/es/platica-mestre-cigano-audios-mp3_rf_17026850_1.html (Accessed 8 June 2020).

7 Victor Montes [Guest] [2017] Divagar Radio [Podcast]. August 10. Available at: https://mx.ivoox.com/es/divagar-contra-mestre-tequila-audios-mp3_rf_20259971_1.html (Accessed 8 June 2020).

8 Christopher Suárez [Guest] [2018] Divagar Radio [Podcast]. January 24. Available at: https://mx.ivoox.com/es/divagar-professor-chris-yanga-audios-mp3_rf_23324500_1.html (Accessed June 2020). Flores Ochoa (2000: 15) also mentions Armando Pequeno, a Brazilian capoeirista based in Paris who gave some workshops in Xalapa in 1994.

in 1999. This event can be understood as representative of the way that capoeira developed in Mexico for several reasons. First, none of the teachers at this event were Brazilian. Instead there were several Mexicans and one Argentinian. Secondly, among the attendees all three major styles of capoeira were already present: Banda do Saci representing capoeira Angola, Terreiro do Brasil representing capoeira Regional, and Longe do Mar representing contemporary capoeira. Finally, the internal structure of these groups corresponds to three major categories that still dominate the Mexican scene:

- Terreiro do Brasil, as the Mexican headquarters of a Brazilian group, lead locally by a Mexican instructor (*Tequila*);
- Banda do Saci as a local Mexican group, whose work is validated by a Brazilian *mestre* living abroad (*Curió*); and
- Longe do Mar as an independent Mexican group, not (yet) sponsored by any Brazilian *mestre*.

During the first 8 years of Mexican capoeira, no Brazilian teachers took up permanent residence in the country. This changed during 2000 with the arrival of *mestre* Pedrinho de Caxias, who stayed six years in Mexico before continuing his journey to Europe [see: Varela 2019: 117]. Shortly afterward, in 2001, Henrique Lemos Cordeiro, today known as *Contramestre Caverinha*, was invited by Longe do Mar to give a workshop in Mexico City, and became the first Brazilian capoeirista to settle in the country. Since then other Brazilian capoeiristas have visited the country, some merely passing through; others residing for a few months or even years before moving to the North. Yet almost none have settled down permanently.

The number of Brazilian *mestres* living and teaching in Mexico can be counted on the fingers of one hand (table 1). Despite this, capoeira continues to grow and develop. Although there is no detailed record of currently active students and teachers, this data is based on available information about existing groups, and Mexican *capoeiristas* who have achieved the highest graduations (*mestres* and *contramestres*), to provide an overview of Mexican capoeira today.

Estimating the exact number for the capoeira groups active in Mexican territory is difficult. A database developed in 2012 by *Contramestre Bateria* counted 154 organizations, while the information collected at capopedia.org.mx suggests the existence of 111 groups. Both of these numbers contrast with *Contramestre Caverinha's*, who estimated at least 250 active groups in 2018.⁹

9 Henrique Lemos Cordeiro [Guest] [2018] Divagar Radio [Podcast]. 21 February. Available at: https://mx.ivoox.com/es/divagar-formando-caveirinha-audios-mp3_rf_23934648_1.html (Accessed 8 June 2020).

Regardless of their exact number, the available sources allow us to place the groups into four categories according to their internal organization:

- Local branches of international groups overseen by Brazilians (living in Brazil or elsewhere, but not in Mexico) in which classes are taught mainly by Mexican instructors (e.g., Cordão de Ouro, Abadá, Sinhá, Ouro Verde, Terreiro Mandinga de Angola, etc.)
- Autonomous local groups created and directed by Mexicans, whose work is supported by one or several Brazilian masters (e.g., Banda do Saci, Longe do Mar, Capoeira é Vida, Jogar Diferente, Pé no Chão, Ginga no Gueto, etc.)
- Autonomous local groups created and directed by Mexicans that work independently (e.g., Arte do Povo, Colectivo Resistência na Capoeira, Cafres, capoeira UMALI, O.L.M.E.C.A., etc.)
- Autonomous local groups created and directed by Brazilian masters settled in Mexico (e.g., FICAG, Centro Esportivo Cultural Pura capoeira em Movimento, and Caçua)

The fact that most groups belong to the first three categories suggests that capoeira in Mexico, unlike diasporic capoeira, is not dominated 'by expatriate, self-exiled Brazilians', but by Mexicans who are sometimes affiliated to Brazilian groups but often do relatively independent work. It is remarkable, for instance, that the group with the largest number of affiliates is Longe do Mar, a local project lead by the first two Mexican *mestres*: *Mestre Cigano* and *Mestra Rosita*, who received their title from *Mestre Acordeon* in 2013 and 2017, respectively. This contrasts with the more 'advanced' glocalization scenarios observed in the North by Joseph [2008b] and Wulfhorts, Rocha and Morgan [2014] where non-Brazilian teachers remain working under direct supervision of Brazilian instructors in Canada and in Australia.

Another significant difference between the Mexican case and the situation observed by Delamont and Stephens in the UK is the existence of several local teachers that have obtained the degree of *mestres* and *contramestres*. The number of Brazilian *mestres* permanently residing in Mexico is very close to that of Mexican *mestres* (table 1 overleaf) and surpassed by the number of *contramestres*, which reaches 15 just in Longe do Mar.

Let us reconsider the criteria used by Delamont and Stephens to distinguish between diaspora and glocalization. So far, the analysis of capoeira in Mexico has shown that it did not spread through, nor is it taught primarily by 'homesick' or 'nostalgic' Brazilian migrants. Instead, we find a proliferation of local groups where classes are taught by Mexican instructors, and sometimes do not have ties to any Brazilian

Table 1:
Mestres residing permanently
in Mexico (July 2020)

Brazilians		Mexicans	
Name	Group	Name	Group
Madona	Pura capoeira	Cigano	Longe do Mar
Manchinha	Cordão de Ouro	Rosita	Longe do Mar
Magayver	Cumbe	Guerreiro	Cordão de Ouro
Bartô	Porto da Barra		
Ganso	Terreiro do Brasil		
Date of elaboration: July 13, 2020			

mestre. According to the first criterion, these characteristics are indicative of glocalization of Mexican capoeira.

The second criterion is related to the use of Brazilian Portuguese versus the local language (Spanish). In this respect, two predominant uses of language within capoeira ought to be distinguished: first, during the class, language is used to give indications, or transmit oral knowledge; secondly, it is sung in the lyrics of the songs. Since most of the classes in Mexico are taught by and for Mexicans, Spanish has taken over Portuguese as the preferred language to give indications. However, the names of the movements (*esquivã, meia-lua*, etc.), the instruments (*berimbau, pandeiro, reco-reco*, etc.) and other technical terms (*mandinga, joga, axé*, etc.) are spoken in Portuguese – even in the cases that could be translated into Spanish (*media luna* instead of *meia-lua*, *güiro* instead of *reco-reco*, *juego* instead of *joga*, etc.). The tradition of giving nicknames in Portuguese also persists with few exceptions. These changes in the use of language are similar to the ones observed in Australia by Wulfhorts, Rocha & Morgan [2014].

In the singing, the preservation of the original language is more marked. In the *roda*, Mexican *capoeiristas* sing traditional capoeira songs in Portuguese. However, some exceptions are introduced in classes for didactic purposes. For example, during children’s classes, the instructor might translate the songs to Spanish, to make them more accessible, and I have composed a couple of ‘self-referential songs’ in Spanish to help my pupils distinguish between *quadras, corridos*, and *ladainhas* (i.e., diverse song-types). Except for the cases where lyrics were translated

for didactic goals, these changes in the use of language seem to be normal in the North, where diasporic capoeira teachers usually learn and teach in the local language. Thus, in the case of the second criterion, the argument for a glocalized capoeira in Mexico is inconclusive. Thus, let us consider the third criterion.

Although the glocalization of Mexican capoeira might not be clear in the use of the language, the reinterpretation of the practice to express local meanings is much more evident. Talking about the music, for example, Mexican *capoeiristas* have written numerous original songs – there are even music albums composed and recorded entirely by Mexicans. Despite being written in Portuguese, many songs refer to capoeira events in Mexico, such as the Encuentro Nacional de Capoeira (that has had a new musical theme every year since 2006) or other experiences of local capoeiristas. The songs sometimes syncretize capoeira with the local culture, as the *ladainha* entitled ‘Día De Muertos’ (Day of the Dead), which recalls one of the best-known Mexican traditions to pay homage to deceased legendary *mestres*.¹⁰

Similarly, capoeira has served as inspiration, resource, and pretext for the work of contemporary Mexican visual artists, choreographers and musicians, whose work has resulted in exhibitions and performances with international visibility.¹¹ Some of these works have led to an

10 Available at <https://youtu.be/8PEcjhmOqQ> (Accessed 22 June 2020).

11 For example, *Quando eu aqui cheguei*, a choreography by Adolfo Flores Ochoa, presented in Germany and the United Arab Emirates in 2006.

exchange between capoeira and artistic genres that might seem incompatible, as in the case of *João*, an opera with a libretto by Adolfo Flores and original music by Carlos Allegretti, inspired by the Brazilian folk story of '*Riachão e o diabo*' (the stream and the devil).¹² Finally, local engagement with capoeira has led to innovations in sports, such as the movement system called Acromoving, developed by Javier Campuzano Yedra (*Contramestre Banano*) combining elements of capoeira, gymnastics and contemporary dance.¹³

Even in the case of capoeira Angola – considered by many to be more traditional and resistant to innovation – Gonzalez Varela [2019: 118-120] has documented how Mexican groups add 'elements of Mexican history and mythology to their songs', and include yoga retreats, traditional bath-ceremony (*temascal*), Neo-Chamanic ceremonies, and Neo-Aztec dances in their events and workshops.

These examples of cultural reinterpretation or creolization [Lipiäinen 2015] finally lead to the question of the 'authenticity' of Mexican capoeira. This is an interesting point of inquiry since most Mexican *capoeiristas* (including the *mestres*) lack the stereotypical markers of authenticity proposed by Griffith [2013; 2016], which became relevant for the black Jamaican *graduados* observed by Joseph [2018b] in Canada to gain a better position in the local capoeira-market. Despite this, many Mexican *capoeiristas* have obtained the titles of *mestres* and *contramestres*, considered as 'the ultimate marker of authenticity' [Griffith 2016: 43]. This could suggest that authenticity discourses in Mexico might rely less on stereotypical (e.g., ethnicity, gender or nationality) and more on charismatic (e.g., having an 'open' personality, or performing a beautiful *jogo*) and scientific markers (e.g., having the right 'credentials') [see: Griffith 2016]. Similarly, apprenticeship pilgrimages [Griffith 2013], domestic and touristic travel [Griffith 2016], and even imaginary travel, where 'a deterritorialized Brazil is (re)created through non-Brazilians' [Joseph 2008a] might play an important role in the overall authenticity experience of Mexican *capoeiristas*. The growing number of capoeira events (*eventos*) organized in Mexico before the pandemic, which sometimes involved up to three on the same weekend, points in this direction. An exhaustive exploration of this topic, however, falls beyond the scope of this article.

In conclusion, the proliferation of autonomous local groups, patterns

12 The full opera can be seen in the following link: <https://youtu.be/YE1zToROcZY> (Accessed 1 November 2020).

13 To view a playlist with Acromoving classes, visit: <https://www.youtube.com/playlist?list=PLcziyrrRNzHbHwqFFYZ1FhTMNWLgmr65U> (Accessed 1 November 2020)

of cultural reinterpretation, and the fact that the classes are taught in Spanish by local instructors instead of Brazilian migrants are strong arguments that Mexican capoeira has assumed distinctly glocal forms. Thus, as Wulforth and her team have emphasized, 'regarding capoeira as only diasporic can limit our understanding of the complex intercultural relations within capoeira' [2014: 1809].

NORTH-SOUTH DIVIDE, BODILY CAPITAL AND GLOBALIZATION PROCESSES

Testimonies from capoeiristas in other Latin American countries suggest that capoeira has undergone similar glocalization processes in the region. For example, David Briseño, *Professor Dourado*, claims that capoeira arrived in Panama through an Argentinean teacher and that the first *capoeirista* to settle in Nicaragua was from Venezuela.¹⁴ Similarly, Rubén Nanclares' documentary on the history of capoeira in the city of Medellín suggests that the practice there developed as part of a local, independent project lead by Colombian teachers.¹⁵ Thus, the notion of glocal capoeira might prove to be as useful to analyze the practice's globalization process in the region, as Delamont and Stephens' diasporic capoeira has been in European and North American contexts.

Given this panorama, it seems interesting to inquire why the same cultural practice would adopt a diasporic form that resists glocalization in some regions while rapidly glocalizing in others. In this section, I will outline one possible answer to this by relating the North-South divide with the migration phenomenon, and the concepts of bodily labor and bodily capital as defined by Wacquant [1995]. The concept of 'North-South divide' addresses the social, economic, and political division that exists between the so-called 'developed' countries (the North) and the supposedly 'less developed' countries (or the South). For De Sousa Santos [2006], the North includes those countries that benefited from capitalist modernity, while the South includes those that have suffered from its consequences – no matter their actual geographical location.¹⁶

14 David Briseño [Guest], (2018), *Divagar Radio* [Podcast]. September 4. Available at https://mx.ivoox.com/es/divagar-profesor-dourado-16-08-2018-audios-mp3_rf_28284342_1.html (Accessed 8 June 2020).

15 Rubén Nanclares (2018). How did capoeira arise in Medellín? Available at: <https://youtu.be/T3DHiPD39sA>. (Accessed 20 June 2020).

16 By relying on the North-South divide and the concept of bodily capital, my argument implicitly emphasizes the economic dimension to the phenomenon. However, it is not my intention to reduce the complexity of the globalization process of capoeira to an economic explanation. Further studies should enhance the scope of my analysis by adding other perspectives to achieve a more complete picture of this process.

The UK, Central Europe, Canada, and the United States belong to the global North, but so do Australia, Japan, and other potent economies. In contrast, Mexico, Brazil, and the rest of Latin America are part of the South, together with most parts of Africa and many Asiatic territories. According to Mimiko [2012], the North owns 90% of the manufacturing industries and controls four-fifths of the world income – despite hosting only one-quarter of the world population. Additionally, through a long history of colonialism (in all possible variants), the North has spread a powerful image that identifies it with the future while equating the South to the past [De Sousa Santos 2006]. Although the current ecological crisis would be enough to question its validity [Contreras Islas 2018], this image continues to play a guiding role in many social processes – including migration [see: Canales 2015].

A second central concept of my argument is bodily capital. Wacquant [1995], following Bourdieu, proposes that the work carried out by athletes on the body itself constitutes a form of capital that can be exchanged for other goods in the future. So-called bodily capital is accumulated thanks to the bodily work that transforms and reorganizes the athlete's body through countless hours of practice. From this perspective, *capoeiristas*, just like boxers, can be seen as 'entrepreneurs in bodily capital' [Wacquant 1995: 66] who are looking for the best returns for their investment.

Now let us bring these different dimensions together. As an effect of the North-South asymmetry, millions of inhabitants of the impoverished and 'underdeveloped' Global South abandon their countries every year looking for better living conditions and opportunities. For most of them, their preferred destination is the Global North that not only promises better economic conditions and wellbeing but also symbolizes the future in their colonized imaginations. This was the case for many Brazilians who migrated to the US and Europe in the 1980s, in middle of a period of economic crisis known as 'the lost decade' [Rocha et al 2015: 408]. Among them were many capoeira teachers.

For *capoeiristas* who belong to the most precarious sectors of Brazilian society – and there are many – migration appears as an opportunity to escape insecurity and violence, improve their quality of life, increase their economic income and even support the family and friends they have left behind. Paradoxically, although 'the career of capoeira teacher [has become] more attractive, especially for black and/or poor males without formal education' [Assunção 2005: 182], 'the oversupply of labor [teachers] and dearth of paying customers [students] make being a capoeirista an unsustainable profession in many of the areas where mestres grow up' [Joseph 2008b: 503]. Consequently, migrating to the North, where the labor market is less saturated and the potential access to paying clients is greater, appears for many Brazilian capoeiristas as an attractive option to exchange their body capital into economic income.

In contrast, by offering a quality of life comparable to that of Brazil, and significantly lower economic remuneration for the same bodily capital invested, the idea of settling in the South is less attractive to Brazilian migrants. For example, as González Varela points out:

Mexico does not offer the same economic advantages as places in Europe or the United States; therefore, to make a living exclusively with capoeira is very hard. For this reason, Brazilian *mestres* tend to use Mexico only as a stopover on their way to visit other places, and few reside permanently in the country. [Varela 2019: 117]

Connecting the North-South divide with the concept of bodily capital can help us understand the predominance of the diasporic shape observed by Delamont and Stephens in the North. Similarly, we can partially explain the recurrent appeal to authenticity discourses¹⁷ [Joseph 2008b; Griffith 2013] as a tactic of Brazilian teachers trying to protect their actual position in the market. Simultaneously, it clarifies the virtual absence of Brazilian teachers that characterizes glocal capoeira in Mexico and other countries of Hispanic Latin-America.

This, of course, does not imply that glocal capoeira in Mexico and other regions of the South is somehow 'isolated' from the Brazilian diaspora. As stated before, Mexican capoeira groups frequently invite Brazilian teachers to give workshops in local capoeira events that become important foci for domestic apprenticeship traveling. For instance, even during the coronavirus pandemic, Longe do Mar's 22nd Encontro Nacional de Capoeira took place in a virtual format, with online classes held by renowned Brazilian *mestres* based in the US, Brazil and Europe.¹⁸ However, in recent years, the number of Mexican events in which the guests are local teachers is growing.¹⁹ Besides promoting local talents, the logistic of these events also indicate the difficulties that local groups have in raising the funds to cover the costs of inviting a Brazilian *mestre* [see: Gonzalez Varela 2019: 119]. Consequently, it seems like relying on diaspora teachers and engaging in a certain sort of authenticity discourse is a luxury good that appeals to students in the North, but one that the students in Mexico are often unable to afford.

17 Wonderfully condensed by Campos, Delamont and Stephens [2010] in the phrase: I'm your teacher, I'm Brazilian!

18 For information on this event, visit: <https://capoeira.org.mx/encuentro/> (Accessed 30 October 2020).

19 An excellent example is the annual event 'Ela joga capoeira' in which all classes are taught by Mexican female capoeiristas. Information on the event can be found at: <http://capoeira.org.mx/tag/ela-joga-capoeira/> (Accessed 30 October 2020).

I would like to close this section proposing the hypothesis that the accelerated glocalization of capoeira in Mexico (and possibly other regions of the South) – which contrasts with the diasporic shape predominant in the North – reflects a pattern in the globalization of other Southern practices that migrate in the form of bodily capital. Going back to the examples of glocalization and diaspora referred by Stephens and Delamont [2008], for instance, this could also be the case of tango. Within the field of martial arts, it could be interesting to test my hypothesis by analyzing the expansion of South Asian, Latin American, or African practices.

DOES THE SOUTH ANTICIPATE THE FUTURE?

When Delamont, Stephens, and Campos [2017] ask about the future of capoeira in the UK, they point out that Campos – a Brazilian teacher himself – ‘is very resistant to the idea that capoeira in the UK could ever glocalize and remain capoeira in any meaningful sense’ [167]. This resistance, common to other Brazilian teachers, often adopts the form of authenticity discourses that exalt an idealized ‘brazilianity’ that would get lost if capoeira were taught by non-Brazilians. Joseph [2008b] analyzes this kind of authenticity discourse as a strategy of Brazilians to secure their position in the Canadian market. She points out, however, that they create logical paradoxes by simultaneously affirming that capoeira, as they teach it in the North, is different from capoeira in Brazil²⁰ – thus conceding a deliberate loss of ‘authenticity’ to fit the expectations of their European and North American clients. Furthermore, she describes how Jamaican teachers in Canada fuse ‘capoeira drumbeats with Jamaican dancehall rhythms’ [Joseph 2008b: 507], while remaining reluctant to admit that they are transforming the practice.

Despite its intrinsic paradox, authenticity discourses would serve to prevent non-Brazilian *capoeiristas* attempting to teach before experiencing the ‘authentic’ Brazilian shape of the art, which would require traveling to Brazil as an apprenticeship pilgrim [Griffith 2016] for several months – an unaffordable requirement for many students. The astonishing absence of high ranks among the students observed by Delamont and Stephens in the UK (where local *professores* or *contramestres* were rarely observed) could derive partly from this sort of market strategy.

20 In general, Brazilian teachers themselves usually claim that the capoeira they teach in Europe is less violent than its Brazilian variant [Stephens & Delamont 2008: 66; Joseph 2008b: 508].

However, in other regions of the North like the US, Canada and Australia, non-Brazilian teachers have started to give classes under the supervision of their Brazilian *mestres* [see: Joseph 2008b; Wulforth, Rocha & Morgan 2014]. Although these northern teachers – at least according to the existing literature – seem so far to be pursuing independent capoeira projects, their existence might be announcing the beginning of a transformation in the actual diasporic shape of capoeira in the North. Ultimately, as noted by Delamont and Stephens [2008], the proliferation of non-Brazilian teachers can be considered as a first moment of glocalization: ‘Once teachers indigenous to the UK, Japan and Germany emerge, and hybrid forms evolve, capoeira will become more glocal’ [61-2].

If we accept that the glocalization of diasporic capoeira is announced by the proliferation of these northern teachers, then the glocal capoeira of the South might anticipate the future of the North, playing a sort of poetic inversion to the temporal paradox imprinted in the North-South divide by colonial thought. Following this line of thought, studying the development of capoeira in southern regions (like Mexico) could provide valuable information concerning the challenges and conflicts, and also the opportunities, that current practitioners and teachers of diasporic capoeira might find in the process.

There are many different challenges that emerging glocal teachers in the North will probably have to face. However, perhaps the most relevant one has to do with navigating through the authenticity market of the practice to achieve a high degree of legitimacy [Griffith 2016]. In this sense, the studies conducted by Lube Guizardi and Ypeij [2016], as well as Owen and De Martini Ugolotti [2019] suggest that acquiring legitimacy becomes all the more difficult the further a *capoeirista* falls away from stereotypical markers of authenticity [Griffith 2013]. In another work, I have studied the strategies followed by the two Mexican *mestres* with an independent capoeira-project to gain legitimacy within the field of the practice despite lacking the above-mentioned stereotypical markers [Contreras Islas 2021]. Since most *capoeiristas* in the North are also lacking these kind of markers, it might be in their own interest to learn about the experiences of their southern peers.

Among the strategies followed by Mexican *mestres* to gain legitimacy, it was particularly important to receive their titles from living capoeira legends such as Acordeon, Suassuna, Marcelo Caverinha, and Curió. Even when these Mexican *mestres* would pursue independent projects (like Longe do Mar), their legendary godfathers have been helpful to prevent disqualification, since undermining their work would be seen as an affront to their lineage, as observed by Griffith [2016]. Thus, it would be helpful to teachers of the North looking to initiate independent projects to look for the support of great masters – even if

these are not based in Brazil, like João Grande or Acordeon. Similarly, my analysis of the Mexican case [Contreras Islas 2021] has shown that great Brazilian *mestres* are more likely to support the independent work of non-Brazilian teachers who represent a capoeira-community with a high standard of capoeira. In such cases, a great *mestre* might praise the teacher with a high degree as a way to legitimize the work of the community as a whole, even if it is an independent project.

While dedication to a capoeira community is fundamental, having good individual skills does count too. A brief look at the first years of Mexican capoeira shows that having the ability to play at the same level of Brazilian teachers is important in order to be recognized as an equal – and to take part safely in *rodas* and *eventos* where other teachers might try to test your skill.²¹ In this respect, it is important to note that most Mexican capoeiristas have achieved that level or proficiency *without* traveling to Brazil, which bursts the myth of apprenticeship pilgrimage [Griffith 2016] as necessary to become a professional *capoeirista*, like some diasporic teachers in the North seem to sustain. Instead, Mexicans have attained these results by attending to local events, *rodas* and classes. Considering the number of capoeira festivals celebrated in the US, Canada and Europe, northern *capoeiristas* should be able to obtain similar results attending local events.

Although most northern instructors currently teach under the supervision of their Brazilian superiors, it might be a matter of time before some of them can become independent, giving birth to local groups that will compete for a niche in the market, as happens with Brazilian *mestres* and *contramestres* all the time [e.g., Delamont, Stephens & Campos 2017: 46-7]. When this occurs it will not change the organization of the capoeira-market in the North, but probably accelerate the glocalization process. As observed by Joseph [2008b], the search for new niches could intensify cultural reinterpretation and syncretism, actively transforming the way of teaching and performing the art. As another possibility, northern capoeira teachers could take the practice to regions where the market is not yet monopolized by the Brazilians, including other parts of the South (like *instrutor Japão* did in Mexico), or to less attractive regions of the North (like small towns or peripheral quarters). In any case, this will lead diasporic Brazilian teachers to rethink the authenticity discourses, and reevaluate their positioning in the market. For example, since the first Mexican *mestres* received their graduation, many small local groups have asked for their supervision and support, instead of appealing to the often too busy – and too expensive – Brazilian superstars. However, the transition

towards higher degrees of glocalization could increase the perception of training with diasporic teachers as a luxury good.

Finally, the Mexican experience teaches us that far from the tragic death of ‘authentic’ capoeira, glocalization, reinterpretation and creolization [Lipiäinen 2015] become interesting opportunities for artistic creativity to flourish, as seen by the intense cultural production of songs, albums, and plastic and scenic work by Mexican adepts. The glocalization process in the North could bring new songs, stories, documentaries, and plays that capture the adventures of the diasporic teachers, and the lessons that their pupils have assimilated. Without attempting to transform the capoeira practice itself, glocalization could create new artistic and physical expressions by taking capoeira elements and merging them with local culture.

CONCLUSION

Including the experiences of capoeiristas in the Global South in our examinations of capoeira as a global phenomenon challenges the, at present, taken for granted assumptions that capoeira operates as a diaspora. The concept of glocal capoeira better captures the peculiarities of the development in Mexico than the notion of diasporic capoeira used by Delamont and Stephens. This article has demonstrated that it is a valuable analytical resource for understanding the globalization of capoeira and other cultural expressions from the global South. I have also shown that the glocal capoeira found in Mexico might to some extent contribute to anticipate the future development of diasporic capoeira of the North, as the number of non-Brazilian teachers starts to grow.

Exploring other cases of glocalization in the South should provide valuable information to improve my analysis. It might also prove useful to generate hypotheses and outline scenarios for the development of diasporic capoeira in the coming years. Finally, it would be interesting to apply the theoretical lens of this article for analyzing the globalization process of other practices that originate in the South and travel in the form of bodily capital, to see if they follow similar patterns to the diaspora-glocalization divide observed in capoeira.

Acknowledgements

I thank DAAD and Conacyt for financing my research. I am thankful with my fellow capoeiristas *Mestre Cigano*, *Mestra Rosita*, *Contramestre Bateria*, *Instrutora Cupim*, and *Sabiá*, for helping me with the historical reconstruction of Mexican capoeira, and with Dr. Sara Delamont, Dr. George Jennings and the editors and reviewers of this journal for the valuable comments provided during the preparation of this manuscript.

21 The first encounters of Mexican and Brazilian capoeiristas in Mexico were often very violent. Some testimonies about it can be found in: Alejandro Ruíz [Guest] [2017], Divagar Radio [Podcast], September 28. Available at: https://mx.ivoox.com/es/divagar-treinel-espanador-da-lua-audios-mp3_rf_21141846_1.html (Accessed 8 June 2020).

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FIGHT LIKE A GIRL! AN INVESTIGATION INTO FEMALE MARTIAL PRACTICES FROM THE 14TH TO THE 20TH CENTURY DANIEL JAQUET

DOI

10.18573/mas.133

KEYWORDS

Women, fight books, Europe, interpersonal violence, representation, invisibilisation, transgender

CITATION

Jaquet, Daniel. 2021. 'Fight like a girl! An investigation into female martial practices in European Fight Books from the 14th to the 20th century'. *Martial Arts Studies* 11, 71-79.
doi:10.18573/mas.133

ABSTRACT

Women appear in fight books as practitioners in the late Middle Ages. They then disappear completely, only to reappear at the dawn of the twentieth century. How are they represented therein? What discourses of gender and violence are present within the corpus of European fight books? In this article, the representation of women in the fight books of the late Middle Ages is analysed, with a focus on female martial practices in legal procedures. The absence of women (their 'invisibilisation') from fight books in the modern period is compensated by exploring other types of sources relating to female martial arts, including transgender fighters. The final part highlights different martial practices at the dawn of the twentieth century and the reintroduction of women onto the pages of fight books.

Women have always taken part in conflict. This fact may have displeased the men who wrote history, who by various means made women invisible in such contexts. In European societies built on Judeo-Christian religious values and Greek philosophy, men have evidently long sought every means to keep women out of interpersonal violence situations. However, many women, by choice or necessity, have fallen through the cracks of the net that sought to 'protect' them, with or without their consent.

Among the many works on the cultural history of violence in Europe, increasing attention is being given to gendered violence [Fox 2013; Rouse 2019]. This present article does not seek to analyse these works, nor does it aim to define violence against – or committed by [Poirson 2020] – women [Krantz and Garcia-Moreno 2005]. Instead, it investigates the place of women in a specific literary genre: the fight books [Jaquet 2018]. This technical literature represents a heterogeneous corpus of sources, appearing in Europe at the beginning of the fourteenth century and whose production continues today. With the help of texts, images or a combination of both, the authors of these books attempt to put on the page the body movements belonging to the different traditions of European martial arts. In the end, they represent discourses about martial arts. This collection of documents has many forms and functions, and includes both manuscripts and prints. They have different purposes, but all are limited by their imperfect format – the two-dimensional static page – for a transmission of embodied knowledge, which is spread in time and space [Burkart 2016].

Indeed, as with dance, this kind of knowledge is transmitted between bodies and through words in a situation involving the expert and the learner face to face, requiring demonstration, imitation and correction. The role of the written word in this process has primarily a memorial purpose or a promotional one, but not necessarily a didactic one. The corpus includes personal notes by students or teachers, presentation works, didactic manuals, theoretical works, copies or translations of the latter; and these are often corrupted [Bauer 2014]. Thus, we encounter cryptic statements (inaccessible to non-students of the author), attempts to translate knowledge from the body to paper, and content that has been altered in unknown ways during its passage between languages and successive copies (often copies of copies). But all in all, the majority of these works are written by men and depict martial practices that often seem fogged with an exaggerated virility. Against this backdrop, how do martial arts experts or practitioners represent women in these documents throughout the ages? Are women seen to be capable of fighting like a man?

The starting point for the investigations behind this article is a surprising observation: women appear in these books as practitioners

in the late Middle Ages, then they disappear completely, only to reappear at the dawn of the twentieth century. Accordingly, in this article, first, the presence of women will be analysed and categorised in the fight books of the late Middle Ages, with a focus on female martial practices in legal procedures. The second part compensates for the 'invisibilisation' of women in the modern period¹ by exploring other types of sources relating to female martial arts, with a focus on androgynous fighters. The last part highlights different martial practices at the dawn of the twentieth century and the reintroduction of women on the fight books' pages.

1 WOMEN AT THE TURN OF THE PAGE

The first book of the corpus is an exception in many ways. The anonymous master at the very beginning of the fourteenth century writes down a system of fighting with a sword and a buckler (i.e., a small round shield), using seven guards. The master is depicted as a tonsured priest (*sacerdos*) teaching his disciples (*discipuli*) and a woman, who is not only illustrated with her dress and hair, but also named in the text (Figure 1 overleaf).² The treatise contains all the features of a scholastic scripta, typical of academic circles. Written in Latin, the text borrows from Middle High German for technical terms. This is one of the clues to its origin: a town in southern Germany. The type of fighting in question corresponds to an art of self-defence that was taught in the vicinity of universities, but which was also practised in competitive forms in urban environments. The presence of a woman here is surprising, because not only were women not welcome on university benches, but it is even more exceptional to find them among the disciples of a master-at-arms. This is all the more so because she is treated as an equal to the men. The four techniques she performs are located in the last quire of the manuscript, following the other disciples.

1 The 'invisibilisation' of women in fight books is here understood according to its meaning in poststructuralist discourse, in which visibility goes beyond the empirical sense to the dimension of political discourse. On this issue and its roots in authoritative works in the field, see the discussion of Rey Chow's views in Bowman [2013: 77-8].

2 Anonymous, *Liber de arte dimicatoria*, 1305 [Leeds, Royal Armouries, Fecht 01, fol. 32v]: *Ex hiis super[ioribus] allegacionibus Walpurgis recipit schiltslac, quia erat superior & prius parata* (From the abovementioned bindings Walpurgis gets a Schield-Strike, because she was above and the first to be ready [Forgeng 2018: 161]). Regarding material aspects of women fighting, see Gräf [2017]. Regarding symbolism and allegories see Eads and Garber [2014].



Figure 1:
Anonyme, *Liber de arte dimicatoria*, 1305.
Leeds, Royal Armouries, *Fecht1*, fol. 32r.
© Royal Armouries – OA.

Other representations of women in medieval fight books are of a different nature. There are some isolated representations, where sex is probably used for allegorical or at least symbolic purposes. The anonymous anthology compiled in the years 1465-85 includes several martial disciplines from various traditions, with or without illustrations, as well as representations from a treatise on the art of siege warfare.³ Often, for presentation works such as this one, the manuscripts are produced in several stages, and some contents from other sources are included. For the illustrated parts, the project leader of the commissioned manuscript, who would not necessarily be a martial arts expert, would define the plan and have the illustrations done in a workshop before the text was added, for which a portion of the page is left blank. It was at this stage that the production of this manuscript was interrupted. The numerous repentances that can be spotted on the

³ Anonymous, untitled [*altes Fecht-, Kampf- und Ringbuch*], 1465-80. Wolfenbüttel, Herzog August Bibliothek, Cod. Guelf. 78.2 Aug. 2° - Heinemann-Nr. 2769). No studies about this manuscript is currently published. A description (codicological note) of the manuscript is available in Leng [2008: 32-4].



Figure 2:
Anonymous, untitled [*altes Fecht-, Kampf- und Ringbuch*], 1465-80.
Wolfenbüttel, Herzog August Bibliothek, Cod. Guelf. 78.2 Aug. 2° -
Heinemann-Nr. 2769, fol. 2r.
© HAB Wolfenbüttel diglib.hab.de/mss/78-2-aug-2f/start.htm

sheets suggest, however, that the artists' work required corrections, or even that it did not fit at all. This may be why this one, like others, was left unfinished. Nevertheless, in the first quire, which includes a section dedicated to the handling of the longsword in civilian clothes (i.e., without armour), the depiction of a naked woman armed with a sword facing a fighter piercing her heart is placed at the beginning of the iconographic programme (Figure 2 above).

In the absence of a text beneath this image and the lack of information on the context of its production, it is only possible to guess at the interpretation of this image. It is likely, however, that it is an allegory of Lust, often depicted in northern Europe by images of naked women with flowing hair. The fact that this woman is armed is surprising, however, but it could serve as a reminder of chivalric and Christian values: after all, Lust is being fought and defeated here.

Apart from the *Liber de arte dimicatoria* and the rare, isolated representations of women in the medieval and pre-modern corpus, there is an important category of representation of women in the fight books: the judicial duel between men and women.

2 WOMEN ON FULL PAGE

'Here, he neutralized the blow and captured the arm'. 'Here the woman attempts a final technique'.⁴ These techniques (Figure 3) are gendered in the sense that they are designed to be performed by either the woman or the man. The woman is therefore, in the same way as the man, able to receive the teachings of the master-at-arms in this specific context. This section of the manuscript contains more than nine illustrated female combat techniques.

This is not a fictional representation of combat between the two sexes, as would be the case, for example, in Hugues Piaucele's fabliau *Sire Hain et dame Anieuse*, composed at the end of the thirteenth century and copied in the fourteenth and fifteenth centuries.⁵ Indeed, this story depicts a couple struggling to get the 'braies' – that is, to determine who will 'wear the breeches', as the expression goes – against a backdrop of mockery of contemporary legal procedures.

From the thirteenth century onwards, all the legislative texts governing the practice of judicial duelling emphasised the need to offer equal opportunities to combatants fighting within barriers (fences), even when the sexes or status were different. From the second half of the fourteenth century onwards, however, the rule was to apply these procedures to very specific cases, with the aim of seeing them gradually disappear. In France, from the end of the thirteenth century, the customs of Beauvaisis are very clear: women do not fight, but can be represented by a champion.⁶ However, in cases where exceptional circumstances would require the participation of a woman in a judicial procedure with combat without the use of a champion, several customs do elaborate on the practices. This is the case of the Freisinger custom, written down in 1328, which specifies that the man must then be buried up to his kidneys, in order to restore the balance of opportunity between the man and the woman [Jezler and Bussinger 2014: 190]. Several of these customs, compiled in 1346 in Ludwig von Bayern's

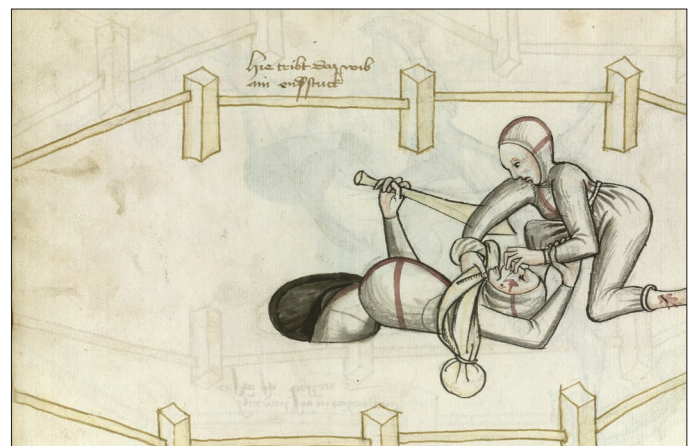


Figure 3:
Hans Talhofer, *Alte Armatur und Ringkunst*, 1459. København, Det Kongelige Bibliotek, Thott 2902, fol. 80v and 83v.
© Det KGL Bibliotek - OA.

4 Hans Talhofer, *Alte Armatur und Ringkunst*, 1459. København, Det Kongelige Bibliotek, Thott 2902, fol. 80v: Hie hat er den schlag ir entwert und dem arm gefangen; fol. 83v: Hie tribt daz wib ain endsstuck. English translation of the author.

5 Edition from the NRCF, vol. 2, number 134, quoted and commented in Ribémont (2016: 99).

6 Se fame l'a apelé et ele n'a en son appel retenu avoué; li apeaus est de nule valeur, car fame ne se puet combatre. Edition from A. Salomon [1899], quoted and commented in Ribémont [2016: 98].

Book of Law, detail in four articles how the fight between a man and a woman should be conducted. The woman, walking freely in the enclosed field, is armed with three stones wrapped in cloth. The man, buried up to his waist, has three clubs. The fight is interrupted when the woman is dragged into the hole, when the man is pulled out, when the combatants are disarmed or when one of the parties gives up and wins. Contrary to popular belief, medieval judicial duels – like ancient gladiatorial combat – do not necessarily end with the death of one of the protagonists.

These procedures provide the legal framework for the master-at-arms to be hired to prepare his clients for these public fights. In the fifteenth century, customary law also governed the possible duration of the training, six weeks [Jaquet 2017: 131-4]. This form of combat was to disappear, but still appears episodically up to the beginning of the sixteenth century. Narrative sources, such as chronicles, present them as archaic. Nevertheless, more than twelve fight books (including their copies in the first half of the sixteenth century) have sections dedicated to these gendered martial practices. The manuscripts of Hans Talhoffer, a master of arms active in the mid-fifteenth century [Burkart 2014], represent the most detailed sections. In the Munich and Copenhagen manuscripts (Fig. 3), the man is depicted with his right hand tied to his waist, probably another way of imposing an additional disadvantage to diminish his natural abilities in order to ensure equal opportunities between the sexes. Jörg Wilhalm, a hatter from Nuremberg, who is also a master of arms specialising in armoured combat and various forms of legal combat (*Kempfmeister*), illustrates this type of combat with the man trapped in a wine barrel.⁷ Was this a form of mockery, where this archaism (in the sixteenth century) was shown in public during martial demonstrations, or was it a way of training his clients without having to dig a hole? The information contained in the manuscript does not make it possible to find out.

7 Jörg Wilhalm, kunst zu Augspurg, 1523 [München, Bayerische Staatsbibliothek, Cgm 3711, fol. 58ar].

3 WOMEN MISSING FROM THE PAGE

From the second half of the sixteenth century onwards, women disappeared from the pages of fight books. Does this reflect a change in mentality, or is it the result of processes of exclusion ('invisibilisation')? This period marks a profound change in the practice of interpersonal violence where matters of honour are settled with bloodshed, now away from the public eye. They passed into the private sphere to follow a codified procedure: the duel of honour [Ludwig, Krug-Richter and Schwerhoff 2012]. There are many fight books that specialise in these practices (civil fencing on foot with the sword alone, which will become the rapier, and/or with companion weapons). In the theoretical universe of legislators and thinkers of honour [Cavina 2016], women are excluded from these bloody procedures, which decimate the aristocrat as well as the bourgeois or the farm boy. Honour is gendered, for males by males. Although women disappear from the technical sources, they nevertheless keep appearing in other types of sources, particularly narrative ones, or are found in representations that often make the news in the industrial Europe. The most famous sword players are those who dress in drag. Let us look at three cases, one per century, which appear before we find women back in the pages of fight books.

3.1 A sixteenth-century hermaphroditic master-at-arms

One of Charles V's chroniclers recounts an episode that marked the courts of the King of France and the Emperor [Goodwin 2015: 51-2]. After the French invasion of Milan and the siege of Pavia in 1525, following a battle that went badly wrong, the French king was captured by the imperial troops. He is escorted to Spain with other French and Spanish nobles. On his way to the palace in Madrid, the imprisoned king stops off in Valdaracete and hears about an undefeated master-at-arms in the region, called Esteban. A passage-at-arms is organised and the king's best blades fall one after the other in single combat, proving to the king the truth of the rumour. This is a very common episode in the chronicles of the time, except for the fact that Esteban was named Estefanía. In her youth, she became famous for outperforming her male competitors in a number of physical and martial games. When she reached Granada, suspicious magistrates ordered an examination of her body by trusted matrons and midwives. It turns out that Estefania was a hermaphrodite. The magistrates then asked her to choose her sex. She chose the stronger sex, so that she could practice the profession of arms. Later married at the church, Esteban became head of the family, acquiring all the rights of a male citizen. Legally, or at least administratively, Estefania had changed sex in order to practice her profession.

3.2 A seventeenth-century fine blade at the opera

The incredible life of Julie d'Aubigny, alias Mademoiselle de Maupin, inspired a novel by Théophile Gautier, published in 1835 (more than a century after her death in 1707). Her mythical story [Albouy 1972] is still performed on stage and on screen. Born in 1670 in Provence, she came from a lower aristocratic family in the service of the Count of Armagnac. Married young, she got rid of her husband and fled to Marseille with her lover to become an itinerant sword player and street singer. She returned to Paris as an opera singer and won several duels, including one against a knight who became her lover. She frequently dressed as a man and went to high society gala evenings, seducing both women and men. An escapade to Brussels to escape the Parisian police allowed her to frequent the social circles of high nobility and the bed of the Elector Maximilian-Emmanuel of Bavaria. Back in Paris, she shone on the opera stage and continued her duelling career, dying in oblivion at the age of thirty-seven.

3.3 An eighteenth-century transvestite knight

Charles Beaumont d'Éon, alias Chevalier d'Éon, spent forty-nine years presenting himself as a man and thirty-two years as a woman. His autopsy established that he was indeed a man. A French man of letters and diplomat, he is best known for his (debated) role as a spy for Louis XV. He worked in Russia and England for French foreign affairs and was a renowned swordsman. At the request of the Prince of Wales, George Augustus of Hanover, the future George IV, a public assault of arms was organised at Carlton House in 1787. The Chevalier d'Éon, dressed as a woman, confronted the Chevalier Saint-Georges, in front of an audience of French and English high society. His victory is commemorated in an oil on canvas by Alexandre-Auguste Robineau. He was wounded in a duel in 1796, but continued to cross swords, privately or publicly, until the age of 81. He died in 1810 in poverty and debt. Like Mademoiselle de Maupin, he inspired many plays and his story is still adapted to the screen today.

These androgyne fencers of the modern period are often turned into mythical figures in the nineteenth century [Steinberg 2001]. On top of this phenomenon, several developments can be observed in the realm of politics and sport in the period 1850-1945. An anti-duellist movement was spreading in Europe and was full of representations that degraded the 'weaker' sex [Spierenburg 1998]. Numerous images of bare-chested women armed with foils or duelling pistols oscillate between quasi-pornography and defiance of social norms and conventions. Fencing developed both in military instructions for the soldier and into a gentleman's sport. If the nineteenth century armies were no place for women, the beginning of sport fencing was a tiny bit more permissive.

There are several mentions of women's fencing halls from the very end of the century, but this was an ambiguous emancipation. It was often the wife of the master-at-arms who ran the hall under her husband's control.⁸ Moreover, they did not take up the pen to write treatises. Sport fencing, with the misogynous ideas of Pierre de Coubertin [Boulongne 2000] and the development of the Olympic movement, remained a man's business until the end of the twentieth century. Women's fencing appeared in foil in 1924, a weapon considered the least dangerous of the three Olympic disciplines. Women could not (officially) compete until 1996 for epee and 2004 for sabre.

4 THE PAGES FOR WOMEN

Post-industrial Europe confined women to the domestic sphere. However, the second half of the nineteenth century marked the advent of a 'progressive' period that saw the first female martial emancipation, which flourished in the first half of the twentieth century. Numerous stories and anecdotes about women fighters were published, particularly in the nineteenth-century press, as a reaction to these attempts at female control of the public arena. It is interesting to note that the tone is often stung by the idea that a woman can outperform a man in combat, a supposedly masculine territory. Women's martial abilities are questioned.

Yet martial artists know that the weapon is used as an advantage multiplier to overcome physical and technical disadvantages. In other words, a good fighter (or indeed a good female fighter) can win an assault against a stronger opponent (or of the opposite sex), thanks to his or her use of the weapon to circumvent his or her own morphological disadvantages or lack of technical knowledge. This even goes back to the biblical stories with the image of David's fight against Goliath. It is a different story for the unarmed combat arts, the 'manly art' of boxing, wrestling, or martial practices from Asia that were imported and acculturated in Europe throughout the twentieth century. However, it is on this very terrain that women reappear in the fight books, as new champions of the art of self-defence.

Coming out of the clandestine boxing matches on the old continent against a backdrop of gambling and exacerbated virility, it was in the United States that the first female boxers entered the public eye. Anna Lewis and Hattie Stewart fought for the title of boxing champion in

8 Communication with Julien Garry.



Figure 4:
Mary Russell (Duchess of Bedford) and Emily Watts
practicing Jujutsu on the grounds of Woburn Abbey,
1905. Photograph by George Beldam. Public Domain.

1888, in a match covered by the *New York Herald* [Rouse 2019: 21-3]. In Paris, female wrestlers performed against all comers in cabarets. The press presented them as sensational, or on the contrary, sought to ridicule them. It is against this background of collective awareness of a place to be made for women's martial arts that fight books are feminised.

Women's street defence techniques developed in line with the wider uptake of Asian martial arts, in particular jujutsu (AKA jujitsu and jiu-jitsu). The first European instructor was Edward Barton-Wright (1860-1951), who published two seminal articles in *Pearson's Magazine* in 1899 and 1901. He established his new defence method, *bartitsu* (misspelled as 'Baritsu'), made famous by Arthur Conan Doyle as the martial art practised by Sherlock Holmes. Women do not yet find space in these pages, although other sources attest to Barton Wright teaching

women. It was the disciple of the Japanese master Sadakazu Uyenishi, working with Barton Wright, who became the first female author of a fight book. Emily Diana Watts (Fig. 4) published *The Fine Art of Jujutsu* in 1906, in which women's martial arts practices were given a gendered discourse [Godfrey 2012: 93]. This was already acknowledged by male authors, such as Harrie Irving Hancock in 1904, who adapted these techniques to women and children from a medical (physical) point of view [Rouse 2019: 57-8].

These practices were also associated with the suffragette movement, of which Edith Margaret Garrud (1872-1971) was the emblematic figure. The young woman taught jujutsu in London from 1908, at the Suffragettes Self-Defence Club, then later in a series of secret locations to form the Bodyguard group, a combat unit of the WSPU (Women's Social and Political Union) that regularly confronted the police in the street [Godfrey 2012: 101-5].

However, women were often considered inferior by men. Georges Dubois published his manual for street self-defence in 1913. Women are a central part of his discourse as practitioners, but they are still far from parity considerations when it comes to discussing their supposed martial abilities. The author therefore seeks to adapt the techniques intended for men into a series of 'recipes' for these ladies when they are called upon to defend themselves. This same phenomenon was observed thirty years later with Major Fairbairn. This British officer published a reference manual for military close combat (*Get tough!*), whose principles are still valid today. During the Second World War, he dedicated a book (*Hands off!*) to the women who would have to defend themselves without the men at the front. Both approaches, the lethal one for the military audience, as well as the non-lethal one for civilians aimed at women, are simplified adaptation of his combat techniques from his seminal work *Defendu* in 1926 [Bowman 2021: 53-4].

5 EXCURSUS

Women are as capable of fighting as men. Serious business (i.e., defending one's body at the risk of one's life) and less serious business (i.e., recreational, competitive or demonstration martial practices) lead to the execution of the same martial gestures, like two sides of the same coin. It is the intention and the affect that change according to the context of the application of the gesture, not the technique. These different elements lead me to think of the martial arts as non-gendered, following the theory of gender as a social construction. Of course, sexed

bodies are different from one another, but every body is different. Martial artists know that it is a matter of taking into account one's own weaknesses in the practice of martial gestures, whether they are related to one's sex, morphology or experience. For many 21st century readers, it is unthinkable to consider combat sports without weight or gender categories, because of the history behind it as sketched by this contribution. Martial artists, however, can break free from these modern conventions, outside of the institutional competition context.

By viewing women's appearance in fight books as evidence of a deliberate departure from contemporaneous gender norms, the martial arts literature has a long history of violating conventional ways of thinking about women as the weaker sex. This investigation into the corpus of fight books and the place of women in it has made it possible to rule on the exclusion of women in the corpus between the mid-sixteenth and late nineteenth centuries. This observation echoes the research done on gender studies in early modern and industrial European societies, where gender is socially constructed based on Judeo-Christian religion, Greek philosophy and the development of legal norms (Fox 2013). Other sources and representations, however, demonstrate the continuity of female martial arts practices, documented as such as early as the fourteenth century in the fight books.

Acknowledgment

This article is an extended version of an original research published in French by the author in a collective book edited by Martial Poirson (2020). I thank Chassica Kirchhoff for her help in analysing the image of the Wolfenbüttel, Herzog August Bibliothek, Cod. Guelf. 78.2 Aug. 2°, Julien Garry for the information about the female fencing salles of the nineteenth century France.

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THE INFLUENCE OF FRENCH GYMNASTICS AND MILITARY FRENCH BOXING ON THE CREATION OF MODERN KARATE (1867-1914)

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DOI

10.18573/mas.135

KEYWORDS

Karate, French boxing, kata, Okinawa, French Military Mission, gymnastics

CITATION

Loudcher, Jean-François, and Christian Faurillon. 2021. 'The influence of French Gymnastics and Military French Boxing on the Creation of Modern Karate (1867-1914)'. *Martial Arts Studies* 11, 80-100.
doi: 10.18573/mas.135

ABSTRACT

The birthplace of karate is Okinawa in southern Japan. During its national integration through the military and educational action of the imperial government during the Meiji era, the basic katas (型) or 'forms' (series of defence and attack movements in space epitomizing combat against opponents) called pinans (ピンアン) or the quiet way, were created by Itosu (last name 糸洲) Ankō (first name 安恒). These laid the foundations of modern karate, at the crossroads of the nineteenth and twentieth centuries. France played a major role in the organisation of the Japanese army in this period. This paper analyses the extent to which France influenced this process with specific attention to the model of French gymnastics and boxing associated with the influential Joinville School of physical education.

Karate is a world-famous combat practice, shaped in the melting pot of the Ryūkyū Islands in southern Japan. It encompasses several million practitioners in styles as diverse as *shotokan*¹, *goju-ryu*,² *wado-ryu*,³ *shitō-ryu*,⁴ *shorin-ryu*,⁵ among many other branches and variants. Our questions are: Why was this fighting discipline born in this place? What were its influences? Multiple interpretations of its origin exist, oscillating between a Chinese paternity and it being a practice indigenous to the island. Most stories are based on a more or less embellished mythical background, in the absence of reliable written sources beyond the 19th century. Yet, in reality, karate takes shape (and this is one of its original features) from a set of techniques transmitted and developed with the help of *katas* (型) or 'forms', rather than via 'organized' combative encounters as seen in Western pugilistic practices [Loudcher 2000]. *Katas* are prearranged sequences that practitioners learn and perform, consisting of miming punching and kicking strikes as well as parries and ripostes. These are executed solo or against one or more imaginary opponents. The techniques are more or less complex, depending on level. Inevitably, what is deemed the 'correct' performance of such sequences will vary, depending on the preferences of different masters at different times.

However, a modern version of karate emerged at the turn of the 19th and 20th centuries [Ikuro *et al.* 2000]. It was derived from a simplified version of certain *katas*, performed during group practice under the direction of an instructor who would chant numbers or key phrases during their execution. This practice then spread in an official and even institutionalized manner across Okinawan schools and teacher training colleges. According to several sources, Itosu (or Otsu) Ankō (1831-

1915) was both instrumental to their creation and their naming – as *pinans* (ピンアン - quiet way). This dissemination allowed karate to become increasingly well known throughout Okinawa and Japan in the interwar period.

Of course, Itosu Ankō did not create these *pinans* in *abstracto*. There were already specific fighting practices in Okinawa that were not then known in Japan, where fencing (*kenjutsu*) and various self-defence practices that can be grouped under the name of *jujitsu* were most dominant.

Without wishing to question the originality of these ancient disciplines of codified fighting skills, it is nevertheless significant that the basic karate *katas* appeared in Japan at a time when identical forms of collective teaching had already been widely disseminated in the occidental world for at least three decades. Their spread had been led, or at least influenced, by the French boxing of the Joinville School of Gymnastics [Loudcher 2000]. Created in 1852, under the Second Empire (1852-1870), the *Ecole Normale Militaire de Gymnastique de Joinville* was missioned to train gymnastics instructors for the French army⁶. Moreover, the French military had been present in Japan since the Meiji era (1868-1912), and had taken an active part in the country's military physical training and, consequently, in the Japanese educational system. Against this backdrop, one might legitimately ask what sorts of influences were at play in this global exchange.

Although a few academic works have accurately described these Franco-Japanese relations in the latter part of the 19th century and the beginning of the 20th century [Maejima 2014; Baba *et al.* 2015] none have fully considered the question of a possible link between French gymnastics and boxing and the invention of modern karate. Of course, as this history is anchored in Okinawa and the French military did not go there, it seems difficult to put forward this hypothesis. And yet, a rereading of the sources at our disposal, an analysis of the work carried out, as well as the discovery of certain previously unknown archives raise serious questions. Moreover, these go beyond the strict military framework. All of Japan was modernising and transforming itself, in industrial, cultural and commercial realms.

The Joinville School of gymnastics (1852-1953) became more active after the war against Prussia in 1870, producing more instructors and trainers. At that time, non-commissioned officers and officers are trained for a period of six months. Besides, they come back to their regiment to train the regular soldiers. The name changes in 1872 and entitled as *Ecole Normale de Gymnastique et d'Escrime de Joinville*. One needs to notify that this school was not the only one to train military gymnastics instructors. Navy, for example, got its own training Centre in Brest. So, the field of physical training, in the army, was quite challenging.

1 Shōtōkan: 松濤館 (流 style). Shōtō 松濤 means 'pine-waves', evoking the movement of pine needles when the wind blows through them. This was Funakoshi's pen-name which he used in his philosophical writings, plus kan 館 meaning 'hall' or 'house'. Therefore: 'Shoto's hall style'.

2 Gōju-ryū (剛柔流) means hard-soft style: a combination of hard 剛 and soft 柔 techniques. Both principles combine into one way, in line with the yin/yang philosophy. 流 means style.

3 Wadō-ryū (和道流). Wa (和) means 'harmony', and dō (道) means 'way'. 流 means style.

4 Shitō-ryū (糸東流): The name Shitō was created by combining the names of the two masters of Mabuni Kenwa: 1) Shi (糸) meaning Master Itosu (糸洲), Ankō (安恒); and, 2) Tō (東), meaning Master Higaonna (東恩納), Kanryō (寛量).

5 Shōrin-ryū (少林流): 'small' (少) and 'forest' (林). 流 means style.

Besides, even before establishing any clear or direct influences between French and Japanese hand-to-hand combat systems, a comparative study of these practices will allow us to consider a broader sweep of historical issues: for instance, both encompass a common problematic of political reinforcement of the bodies; but, in the case of Japan, this led to preparing the country for war. In other words, even if the hypothesis of a French influence on the appearance of modern karate turns out to be plausible, the fact remains that there is much that is original and unique to both.

1 THE JAPANESE GEOPOLITICAL CONTEXT AND WESTERN INFLUENCES AT THE ADVENT OF THE MEIJI ERA (1868)

1.1. The first French military mission

The advent of the Meiji era gave the Occidental world the opportunity to come and modernise Japan on a massive scale. Of course, its opening to the foreign world had existed long before, but it was done in a controlled manner. After religion, introduced in the 16th century by the Jesuits, the end of the Opium War in China opened Japan to Westerners. Following Admiral Percy's *coup de force* in 1854 which transformed the geo-political situation, trade and politics took over. The Western nations provided diverse specialities and skills. For instance, the British took care of transport, and France – in light of its past Napoleonic victories – was entrusted with military organisation and armament [Maejima 2014].

However, it was on a commercial basis that these relations intensified. Following the Lyon silkworm epidemic, contacts were established with Japan in the early 1860s [Polak 2005]. In fact, Japanese worms proved more resilient and their importation became crucial for the French silk industry, which was in full decline. Relations between Japan and France were developed, which were all the more favourable as the English showed a lack of interest in the Japanese, coupled with mistrust following the war they waged against the Satsuma clan⁷ in 1863 [Fletcher 2019]. Contacts at the highest level were then established between France and Japan. In the word of La Peyrère, the minister, 'M.

7 The Satsuma clan (薩摩藩) was one of the most powerful feudal estates in Tokugawa Japan, which played an important role during the restoration of Meiji and in the government that followed. Commanded throughout the Edo era by the Shimazu clan's tozama daimyō, its territory spanned the provinces of Satsuma, Osumi, and southwest Hyūga on the island of Kyūshū, and had the kingdom of Ryūkyū as vassal. The territory is largely contiguous with the current Kagoshima Prefecture, and parts of Miyazaki Prefecture.

Léon Roche, did not hesitate any longer, and on 7 November 1866, the court of Yeddo was officially informed that His Majesty the Emperor of France had authorised the sending of a military mission to Japan' [La Peyrère 1883: 14]. Officially, this lasted barely more than one year.

The mission arrived in the port of Yokohama in early 1867. The group consisted of nineteen people and was led by Staff Captain Charles Jules Chanoine [Baba et al. 2015: 510; Chanoine 1897]. It comprised five officers, including engineer captain Jules Jourdan, artillery lieutenant Jules Brunet, cavalry lieutenant Léon Descharmes and two infantry lieutenants, MM Charles Dubousquet and Edouard Messelot. Non-commissioned officers and instructors from different arms accompanied them, including a second lieutenant attached to the Imperial Stud, André Cazeneuve and a trumpeter, M. Gutthig, attached to the guard [La Peyrère 1883: 26-27].

This mission was engaged to organise the army of the Shogun (Taikun) Yoshinobu Tokugawa (elite unit of the Denshutai).⁸ Jules Brunet started by creating a military school in Yokohama, then in Tokyo. But thereafter a series of dissensions arose. A year before the arrival of the military mission, Ōkubo Toshimichi and Saigō Takamori of the Satsuma clan had met with Kido Takayoshi of the Chōshū estate to form a secret agreement, the Satchō alliance, whose goal was the fall of the shogunate. In 1868, the so-called Boshin War⁹ broke out between the southern Daimyos who wanted to re-establish the power of the Emperor and the lords favourable to the Shogun. From then on, by the imperial decree of October 1868, the French mission was ordered to leave Japan. But Lieutenant Jules Brunet (1838-1911) and some of his non-commissioned officers (François Fortant, Eugène Marlin, André Cazeneuve, François Bouffier and Eugène Collache) continued to support the Shogun and resigned from the French army. Among the southern troops, 'the officers of the Satsuma clan had received some instruction [...] from a Frenchman, the Count of Montblanc, and from former French non-commissioned officers' [Lebon 1898:

8 This story is partly retold in the 2003 film *The Last Samurai* with Tom Cruise. However, unlike the film, the actual mission was not to the Emperor, but to the Shogun.

9 The Boshin war (戊辰戦争, literally 'War of the Year of the Dragon') is a Japanese civil war that began in January 1868 under the reign of Emperor Meiji, a few months after the restoration of supreme power to the emperor, and continued until May 1869. On the one hand, the armies of the clans of Satsuma, Chōshū, Tosa and their allies, close to the emperor, and on the other hand, the troops belonging to the Shogunal government of Edo and the clans that remained loyal to it, clashed. The clans of Satsuma, Chōshū and Tosa sought to supplant by force the opposing party and to prevent imperial authority from being exercised in a federal form by all the clans. It marks an emblematic break between the times. French soldiers dismissed from the French army to support the shogun party.



Figure 1:
First French military mission in Japan 1867
(Bibliothèque nationale de France)



Figure 2:
Collache, Eugène. 1874. 'Une aventure au
Japon'. Le Tour du monde 28: 49-79.

23-24].¹⁰ After the defeat of Hakodate in May 1869, the victory of the Imperial (Mikado) party was total and marked the end of the short-lived independent Republic of Ezo (蝦夷共和国, Ezo Kyōwakoku).

10 Charles Descantons de Montblanc [1833- 1894] was a French diplomat. An aristocrat, he obtained an official post in the Philippines in 1854. In August 1858, he went to Japan with the mission of Baron Gros who signed the treaty of trading and friendship. He quickly learned Japanese and became the friend of Kenjirō Saitō, a man who was to accompany him in his exploration of Kyūshū. He then visited Kagoshima and returned to Europe in 1861. On 14 September 1865, he welcomed the Japanese mission of Nagaoki Ikeda of the Satsuma clan and on 23 September, began a contract of understanding between Belgium and the Satsuma. He planned the invitation of the Satsuma clan at the Paris Universal Exhibition in 1867. The same year, in October, the prince of Satsuma invited him to Japan. He then became the first French diplomat accredited by the Emperor of Japan and returned to France at the end of December 1869.

1.2. The second French military mission to Japan (1872-1880) and the Japanese geopolitical context

Far from holding France responsible for its indirect involvement with the Shogun, nor for the defeat of Sedan against Germany (1870), a second mission was sent, from May 1872 to 1880. On the side of the French army, after having been recalled and blamed, the officers guilty of the rebellion with the Shogun were quickly reinstated and some of them, moreover, had high functions – such as Jules Brunet, who reached the rank of General.

It is true that, according to Colonel Lebon, the first mission 'had created strong sympathies among the cadres it had begun to instruct' [Lebon 1898: 23-24]. Marshal André Cazeneuve was then an advisor to the samurai clans of Matsuma and, after being expatriated to Saigon by the French consulate in 1869, returned to Japan. In March 1873, he was appointed by the new government to look after the 'Arab' stallions donated by Napoleon III – although, of an original 26 or 28, only nine remained, the rest having been dispersed among the hands of clan chiefs. He died in 1874 during this quest in Fukushima [Maejima 2014].

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Albert-Charles Dubousquet married a Japanese woman, the daughter of a samurai, in 1875 and remained in Japan. Moreover, military education had not been limited to the Shogun's troops; some of the military cadres 'had rallied, in 1871, to the Mikadonal government' [Lebon 1898: 24]. Relations had thus been established, notably through Ōkubo Toshimichi,¹¹ who was one of the leaders of the Iwakura Mission of 1871-73¹² and minister of the interior in 1874.

This second military mission was the most elaborate of the three and was comprised of around 100 people over the entire period [Baba et al. 2015]. It would vary in number and quality over the eight years it lasted. The mission landed in April 1872 at the port of Yokohama and was led by Lieutenant-Colonel Charles Antoine Marquerie. He was replaced a little later by Colonel Charles Claude Munier. The other officers were Captain Albert Jourdan, Engineer of the 1st Engineer Regiment, Captain of Light Infantry André Eiche mann, Lieutenant of Light Infantry of the Guard Prosper-Henry Percin, Captain of Light Cavalry in Africa Léon Descharmes, Lieutenant of Artillery Georges Lebon [National Archives, Léonore database]. The mission comprised twelve non-commissioned officers, a cavalry sergeant-major, a bugler and various technicians.¹³ Charles Sulpice, Jules Chanoine, and also Charles Dubousquet, were in charge of the selection of soldiers because, like Albert Jourdan and Léon Descharmes, they had already been part of the first military mission.

Its influence was great, as a number of works have highlighted [Polak 2005; Tavernier 2014; Maeshima 2014; Baba & al. 2015]. It was mainly concerned with the creation and development of military training, and it was in and around Edo (Tokyo) that military training was established.

11 The Shimazu clan is one of the few Japanese families to have retained the same fiefdom (of 700,000 koku) from the Kamakura period to the Meiji restoration. This clan also ruled the northern Ryu-kyu Islands (Okinawa).

12 Iwakura Mission (also known as Iwakura Embassy) is a Japanese diplomatic mission sent to Western countries in 1871 during the Meiji period. Members of this embassy were tasked with observing certain scientific and social fields after a long period of isolation. Their knowledge would then be used to contribute to modern state development. This project was proposed for the first time by Guido Verbeck, an influential Dutch engineer missionary.

13 They are M. Jonquel, engineer sergeant, G. Dagron, infantry sergeant, A. Viest, army sergeant, J. Cros, infantry sergeant, A. Philippi, infantry NCO, U. Haurie, artillery sergeant, E. Moulin, arsenal chief, H. Lassère, infantry sergeant, Jean-Paul Isidore Vidal, military doctor: Albert Ohl, spent a year (1875-1876) in Japan and was a captain in the Marine infantry

The mission's remit was diverse and sometimes required the sending of specialists such as the engineer architect Georges Kreitmann, who spent two years in Japan (1876-78). In particular, the revision of the coastal defence plan meant it fell to them to respond to the threat of war with China. Above all, after compulsory conscription was established in Japan in 1872-73 on the French model, it became necessary to train instructors and establish military training centres.

Five military schools were set up. The '*Yonen-Gakko*'¹⁴ or Youth School took care of young boys, mainly sons of officers and soldiers, who were preparing to take the French military school exams to enter prestigious military High schools as such Saint-Cyr or Polytechnique. Then, there was the '*Kyododan*' School or Guide School (of 800 students) which required seven years of commitment. This was created in 1870 in 'Ozaka' under the name of 'Kiodotai' or 'Guide Corps'. It was then transferred to Tokyo in 1871 and became, two years later, in August, 'the present school for non-commissioned officers, *Kyōdōdan* (教導団)¹⁵' [Villaret 1889: 157]. The third initiative concerned the creation of a veterinary school. The penultimate one was the Toyama School (near Tokyo) which was dedicated to the training of non-commissioned officers [Lebon 1898]. Abolished at the beginning of 1880, it was reorganised under the title and attributions of Special School of Shooting and Gymnastics in the years 1885-1887. But it was the great military school or *Shihan-Gakko* for officers (infantry, cavalry, artillery, engineers) which was 'the most important' [La Peyrère 1883: 83].

La Peyrère, who had the opportunity to visit it in April 1881, left a detailed account of the principles that governed its creation and development. It opened its doors in 1875. However, it was not inaugurated until 1878 due to a fire and the South-West War (*Seinan Sensō*), the so-called last *samurai* revolt against the Meiji reform.¹⁶ One

14 The Japanese terms in this section match the spellings used by Etienne de Villaret and Paul de La Peyrère in their books.

15 'It provides non-commissioned officers for the troops of all arms. Entry is by competitive examination. Candidates must be between eighteen and twenty-five years of age, unmarried and meet the usual conditions of physical fitness and good character. The duration of the course for the infantry is fourteen months' (Villaret 1889: 158).

16 This war is a bit more complex than just 'samurai revolt', although it is often portrayed that way in popular scholarship. Saigo Takamori, initially in favour of the change to the Meiji era, opposed it. Subsequently, the samurai, disappointed with the new regime, rose up in Kagoshima, on the island of Kyūshū. The imperial government sent its new conscript army to fight the forty thousand insurgents. The fighting lasted several months (22 February-14 April 1877) and the imperial army emerged victorious after furious battles.

hundred and fifty-eight candidates from all over Japan were part of the first class [Baba et al. 2015: 520]. In addition, a shooting school for the infantry, a large military arsenal including construction workshops for equipment, a weapons factory, a pyrotechnics school with a cartridge factory (2,500 to 4,000 workers), an artillery range (1873), a powder magazine and barracks were also built [La Peyrère 1883: 83; Baba et al. 2015: 520].

The French presence was massive, and its achievements diverse. Its influence permeated all levels of the army. According to La Peyrère: 'all the theories, all the books have been translated. The commands, which are exactly ours, are given in Japanese' [1883: 76-77]. Moreover, he asserted that 'the ringing [i.e., the trumpet calls] in the Japanese army is exactly the same as ours' [1883: 76-77]. The music for the official Japanese army anthem was even created by a Frenchman, Gabriel Leroux, at the request of Toyama Masakazu (1848-1900).

Moreover, beyond these material conditions, the French influence also left its mark on bodies, through the teaching of specific gymnastics.

2 INFLUENCE OF FRENCH GYMNASTICS IN THE MILITARY MISSION AND THE PLACE OF MILITARY FRENCH BOXING

2.1. Diffusion and influence of gymnastics in the first two military missions

Although the Dutch had already previously offered some military exercise content [Baba et al. 2015: 231], the arrival of the first French military mission was to change everything. French books on military exercise provided the essential basis for the Japanese military, who diligently translated a number of French manuals. Ōtori Keisuke (大鳥圭介), chief of an Infantry battalion, published in 1867 a translation of a French military treatise, *Manuel pratique pour l'infanterie légère* (1863), entitled *Furansu hohei teishihiki* [Baba et al. 2015: 510].¹⁷ Tanabe Ryōsuké translated two books: the *Kei-Hohen-Soten* (*Manuel d'infanterie légère*, 1867) and the *Furansu kei-hohei teishihiki* (*Règlement pour l'infanterie légère française*, 1869)¹⁸

In addition, he translated the first Japanese book of gymnastics in this country¹⁹ in 1868 from *Instruction pour l'enseignement de la gymnastique* [1863] under the title *Nouvelles techniques d'entraînement physique militaire transmises par l'Armée de Terre française* [Baba et al. 2015: 511]. For Okubo Hideaki, the *Mokuba no Sho* (*The Book of the Wooden Horse*, published around 1867) written by Hayashi Shojuro (1824-1896) – formerly a professor of French at Kaiseisho, National Academic Institute – would be a 'translation of a part describing the wooden horse exercises of the army's gymnastics manual' [Baba et al. 2015: 510]. In addition to the two hundred pages of text, eighteen figures illustrate thirty-three pieces of gymnastic apparatus and a plan of outdoor facilities for two to three hundred people is also included [Baba et al. 2015: 510].

Generally speaking, Jules Brunet implemented the teaching of gymnastics as it had been disseminated in France since Colonel Amoros created the first Gym in 1820 – an approach subsequently transmitted through his pupils, Captain d'Argy and Napoleon Laisné (both of whom founded the Joinville School of gymnastics). There was nothing in the Japanese manual that did not already exist in that of the French army (wooden horse, gantry, ropes, jumps, etc.). These courses were then recorded and began to be disseminated [Baba et al. 2015: 510].

The second mission is more specific in the teaching of body practices. According to the autobiography of Major-General Soga Sukenori, Director of the Officers' Training School [Baba et al. 2015: 520], he was involved in the development of the training programme with the French (fencing, gymnastics, mathematics, etc.). Moreover, in the revised manual entitled *Operation for the Infantry (Hohei Sōten)*, second edition of 1873, he mentions having entrusted Nagasaka Akinori, under the leadership of Captain 'Echmann' [sic] in 1872-1873, to revise the 1871 version. The shortcomings of the previous manual are highlighted [Baba et al. 2015: 512]. But it was the translation of Captain Vergnes' manual in 1874 that really made the Japanese authorities aware of the military potential that physical education could bring them [Shiraishi 2009]. In France, this manual served as a military and school education programme from its publication in 1869 until 1880 and was widely distributed in both primary and secondary schools [Loudcher and Vivier 1993].

17 **Practical manual for light infantry**, new edition also in 1869.

18 **Regulation of light French infantry**.

19 He wrote several works on military subjects, including military formations (1865), a glossary of French military terms with Japanese translations (1867), military gymnastics and training exercises (1868), and our work. This is a complete work on infantry drills and tactics, including training of new soldiers, how to form tactical units and deploy them effectively, how to operate a variety of weapons, etc.

Finally, the importance of teaching gymnastics for the French and Japanese authorities is underlined by the sending of Sergeant 1st Class François Joseph Ducros, of the 24th Battalion of Foot Chasseurs. He was seconded to Japan from the 26th March 1874 to the 10th April 1877 [AN, Léonore database] while serving at the Saint-Cyr special military school (since the 7th August 1871) as a gymnastics instructor. His involvement in the Japanese military teaching of gymnastics is certain, but it is not known whether he spread French boxing.

2.2. The Joinville model of boxing 'on four sides'

The question must be: what form of French boxing was taught in Japan? There is an obvious resemblance between, on the one hand, the basic katas that are the pinans, which can be seen at work in numerous photos from the beginning of the 20th century [Faurillon 2020], and, on the other hand, a particular four sides boxing model developed at the Ecole Normale de Gymnastique de Joinville.

In 1874, the pupils of the school delivered a gymnastic performance for more than three hours, in which one of the very first identifiable public performances of French boxing [Loudcher 2000]. The demonstration was innovative in both the number of soldiers presented as well as in the nature of the event. More than three hundred students performed a mimed combat exercise together. The so-called 'four sides' French boxing model is a set of codified movements which can be followed by dozens and dozens of people. Taking place on lines and columns, soldiers or pupils move together under the orders of a trainer: several series exist, expressing different steps of difficulties. In doing this, the School of Gymnastics established a model that would last until the 20th century. There seem to have been many influences involved in this, and it is difficult to say exactly who created it [Loudcher 2000]. Nevertheless, attack and defence movements 'on the four sides' are already mentioned in the treatise by Albert Lemoine [1857]. This suggests that the influence of military gymnastics was already at work not only in Switzerland and Germany, but also in France with Colonel Amoros. Later on, the 'lessons' on two and four sides mentioned in the book by Henri de Jarry de Bouffémont dating from 1869, propose the first chained figures (i.e., linked series of techniques, chained together in sequence) [Loudcher 2000]. But the desire to rationalise the teaching of military gymnastics, which developed massively with the defeat of Sedan (1870), led the School, now called the Ecole Normale de Gymnastique et d'Escrime (1872), to develop models of collective performance. The regiments sent simple soldiers who had been awarded a Master's degree, or even non-commissioned officers and sometimes officers, like Captain Etienne de Villaret, a famous figure in the third military mission to Japan. After training at Saint-Cyr, he did a six-month internship there between 1875 and 1876 [AN, Léonore database].

The break with the secular tradition of the masters-in-arms was complete. A new, rational and scientifically based training was in place. But in this process of creating the 'four sides' French boxing model, other influences nevertheless existed. As early as 1867, the Minister of the Navy, Rigault de Genouilly, had insisted on the need to practice this discipline [Loudcher 2000]. In addition, in the 1874 demonstration, sailors formed a large part of the students at the Joinville School. Finally, the following year, the Ministry of the Navy published an innovative manual in which, not only did this discipline appear for the first time in the army, but also in a more 'interactive' or combative way, abandoning the 'four faces' French Boxing model [Loudcher 2000]. In short, if the Joinville School created this particular form, it should nevertheless not be forgotten that the combative aspect was always present in the various army corps, particularly at Joinville, at least in the early days. Consider Pierre Loti's testimony from 1875:

Every evening, we meet at the 'Lapin sauté', a soldiers' gargote, at the bottom of a garden that smells of seringas and roses. At my place, the gang gets organised; we mix and change costumes, new sergeants and false sailors come out, there are ragpickers too, ridiculous 'gummers', circus 'Gugusses' and barrier 'Alphonse', impossible gangs of unbelievable characters. [...] With these excellent boxing principles that we all possess and the Herculean strength of our instructors, we are the law everywhere, – everywhere feared, everywhere the masters.
[Loti 1923: 123-124]

The official status of French pugilistic activity in this establishment was recognised in 1876, when 'two boxing instructors, two cane instructors and two baton instructors' were appointed to the school for the first time [*Journal militaire officiel* 1876: 316]. Three years later, there were five in the permanent staff [*Journal militaire officiel* 1879: 231]. In short, no soldier passing through this school could avoid its teaching.

2.3 Third mission: an ambiguous mission, to train and/or advise

The third mission started on 17 December 1884 in Yokohama and dealt with the setting up of military schools and the organisation of the army. Relatively small in size, it was made up of five people and lasted up to five years. Henri Berthaut, a captain, was the chief of the Staff Battalion (1887). Etienne de Villaret is an infantry captain (who would end up as a general), as is Henry Louis Lefebvre. They were accompanied by the Maréchal des logis Joseph Kiehl and a translator.

There are many rumours about Joseph Kiehl and Etienne de Villaret in the world of martial studies; they are said to be the first Westerners

to be initiated into Japanese fencing or kenjutsu. As a matter of fact, wrestling or sumo, reserved for selected quasi-professional practitioners, undoubtedly had little appeal for these soldiers. It was far from the technical finesse that Kanō Jigorō would develop with judo in 1882 [Bousquet 1877: 286].²⁰ Thus, fencing seemed to be relatively widespread to the point of presenting 'a frankly national spectacle' [Bousquet 1877: 81], whose rather sporting form might suggest that it held a certain attraction for Etienne de Villaret:

The assembly is numerous and perched on shaky scaffolding. In the middle is a sanded platform topped by a canopy, where the combatants stand. Their masks, made of strong wire, extend into a thick padded buffalo skin headdress, and extend as a collar over their shoulders; a solid wicker breastplate and gauntlets complete the paraphernalia. It is not too much of this armour to ward off the violent blows they deal themselves on the head and neck with wooden slats wielded with two hands like the Japanese sword. A third indispensable character is the camp judge who stands in the middle, with the ceremonial cloak over his shoulders, ready to lunge between the antagonists, which he is often forced to do. [Bousquet 1877: 81-82]

But these interpretations are all more or less based on Watanabe Ichiro's book [1871] in which the author states that the two Frenchmen would have arrived in November 1887 in the dojo of Sakakibara Kenkichi, the 14th master of the famous school of swordplay, Shinden Jikishinkage-ryū (鹿島神傳直心影流).²¹ However, Joseph Kiehl, according to *Jikishin Kage Ryu* [Christian Polak 2005], stayed from 27 September 1884 to 24 July 1887. As for Etienne de Villaret, his return to France is attested on 17 December 1887 [AN, Léonore database]. He therefore left at the end of October. Neither of them could therefore have taken this *kenjutsu* course on the given date.

Moreover, in none of the thirty or so letters that Etienne de Villaret wrote to his mother and brother is there any reference to such teaching, although he admits to being passionate about weapons and mentions

20 It is not a nonsense to suggest that Kanō Jigorō could have been influenced by French instructors, especially those who dealt with biomechanics teaching in Joinville through Georges Demeny's system; the later created with Etienne-Jules Marey, the first biomechanics lab in the world in 1882

21 Sometimes it is named 神傳直心影流 or Shinden Jikishinkage-ryū. Shin (神) den (傳) Jiki (直) shin (心) kage (影) -ryū (流). 'Jikishinkage-ryū' (直心影流) seems to be the diminutive of the name.



Figure 3:
Joseph Kiehl (private collection,
courtesy Mme de Villaret)

having brought back a series of *katana* (which were stolen from the family home in Lot) [Private archives, Mme de Villaret]. This passion is confirmed by photos in which he parades in samurai garb. His attraction to physical combat is not in doubt: he said, for instance, that he had chosen the infantry on leaving Saint-Cyr because it was the 'queen of battles'. In other words, infantry focusing on middle range and close-combat distance, it would demonstrate the body involvement of Etienne de Villaret [Private archive, personal writings of his daughter]. His story, full of twists and turns, bears witness to this adventurous if not bellicose commitment.²²

22 He went to Athens, Algeria, and was wounded in 1914 during the war against Prussia. In the same year, he had five innocent soldiers shot, which led to a trial in 1922, in which he was cleared.



Figure 4:
Etienne de Villaret in samurai outfit (private
collection, courtesy Mme de Villaret)

Thus, it is clear that the four sides model of French Boxing, performed collectively, consisting of miming combat scenes under the direction of an instructor, predates that implemented in the pinans. However, the possibility cannot be excluded that certain local practices enabled Itosu Ankō to facilitate their transfer. Indeed, a practice on four sides would have been quite widespread in certain katas according to Christian Faurillon, who sees a relationship with Japanese 'religious and artistic' dimensions [Faurillon 2020].

Nevertheless, a problematic question remains to be solved in order before one claim any direct influence of Joinville's French boxing, or an indirect one from Western gymnastics: How could Itosu Ankō have been inspired by it given that he did not, a priori, leave Okinawa and that there was no French military mission in these islands?

3 DEVELOPMENT AND JAPANIZATION OF GYMNASTICS EDUCATION

3.1 The militarisation of gymnastics in schools

The teaching of gymnastics in schools was to become an important national issue. As early as 1872, a first text (*Gakusei*) encouraged the development of gymnastics in the educational system: the following year, an 'Illustration of Room Gymnastics' (*Shachu Taisoho-zu*) as well as an 'Illustration of Gymnastics' (*Taiso-zu*) [Abe et al. 1992: 1-28] were officially presented by the Education Department.

Yet, 'it is from the 1885s that Mori Arinori (森有礼) makes gymnastics a tool in the service of the fatherland' [Okubo 2009: 12]. What are the contents of his teaching? One might have thought that this Minister of Education (1886-1889), who was keen on American and English teaching methods (he was ambassador to London), would impose the method of the American doctor George Adams Leland (1850-1924) based on the Dio Lewis system. Indeed, the Department of Education, having privileged contacts with the United States, invited him to come and direct the *Taiso denshu jo* (Institute of Physical Training) in 1878 so that he could continue his research [Okubo 2009].

The American's 'light' gymnastics (i.e., without apparatus) seemed to be perfectly suitable for the school, even if it also included a more elitist preparation for advanced students. Indeed, the Leland method spread in the early 1880s through an association of former students of the institute, which promoted it throughout Japan [Okubo 2009]. However, in 1881, the doctor's contract was cancelled and his teaching was even abrogated in April 1886 by the Ministry of Education, which had been in place since the previous year and imposed military gymnastics on schools [Abe et al. 1992: 1-28]. Meanwhile, by 1883, the Ministry of Education had developed *hohei soren* (infantry training) and *heishiki taiso* (military exercises) for secondary schools [Shiraishi 2009]. It is true that the Leland method has strong similarities with French military gymnastics, especially in the presentation of the exercises, which also explain this easy replacement.

The teaching on four sides was thus quite common. The Leland method proposed that 'exercises are performed symmetrically: once performed on the right, they are repeated on the left and once performed on the front (front face) are repeated on the back (back face)' [Shiraishi 2009: 11]. Furthermore, from 1883-1884, military gymnastics was taught at the Tokyo Normal School (Shihan Gakkō), then, successively at the Osaka, Nagasaki, Fukui, 'and through other schools such as those in Gunma, Kobe, Kyoto, Hiroshima, Osaka, Niigata, Mie, Ishikawa, etc.'

[Shiraishi 2009: 11]. So, gymnastics (体操科, *taisō-ka*) was included in the school curriculum for middle school students (中学校, *chūgakkō*) in December 1885 (明治年). In 1887, it was the turn of military gymnastics (兵式体操, *heishikitaisō*) to appear in the curriculum for middle school students – and also for student teachers. However, as in France, it would later fit in very well with the Swedish method which Kawawase Genkuro (川瀬元九郎, 1871-1945), Inokuchi Akuri (井口阿くり, 1871-1931) and others disseminated during the 1890s [Abe et al. 1992: 1-28].

In the end, either the contents of the training mattered little to Mori Arinori, who saw in this expansion of gymnastics a movement favourable to his views, or the Ministry of War (and this is the most likely scenario) imposed on the Ministry of National Education the teaching method on French sources. However, after this obligation to use gymnastics, a movement towards the Japanization of the content of training was to develop, particularly in the army.

3.2. The Japanization of military training content

The arrival of the third French military mission coincided with this period of change, in which the importance of gymnastics increased in the Japanese army, but also in the educational system. Thus, Etienne de Villaret and Joseph Kiehl would have begun the instruction of the first twelve non-commissioned officers of the Toyama infantry school shortly after their arrival in December 1884. They then extended the training to other groups of students [Watanabe 1971: 45]. In June 1885, the first Japanese instructors and assistant instructors graduated [Watanabe 1971: 46] and a year later (March), the first official course of Japanese military instruction was conducted under the direction of the Japanese officer Itō [Watanabe 1971: 47]. However, in the same year, the Toyama school was reorganised according to the model of the Ecole Normale de Gymnastique de Joinville thanks to the efforts of Etienne de Villaret. In a letter written to his mother, he states that he had submitted the restructuring plan to the Japanese authorities as early as June or July 1885 and that it was 'definitively adopted' in April of the following year [Mme de Villaret's private archives, letter dated 8 April 1886]. Although the mission team was small, the officer was pleased to have been able to set up a 'real infantry training school' comprising four sections: '1° Elementary tactics 2° Shooting 3° Gymnastics 4° Fencing' [Mme de Villaret's private archives, letter of 8 April 1886]. However, German influence had been growing in Toyama since 1885 with the arrival of Jacob Meckel, quickly followed by another of his compatriots.

Lieutenant Colonel Meckel of the German army arrived during my absence. It seems that he is a fat, fleshy man – a great lover of wine – who has given birth to n + 1 books [sic],

without much personality and who seems to be always in a rage. He is going to direct the Ecole de Guerre.

[Mme de Villaret's private archives, letter from Etienne de Villaret to his brother Antoine, Tokyo, 8th April 1889]

For Etienne de Villaret, this change did not suit the Japanese army system, which was not ready to receive the German one. He mocked it: 'It's laughing out loud', he added! [Mme de Villaret's private archives, letter from Etienne de Villaret to his brother Antoine, Tokyo, 8th April 1885]

Moreover, this two-headed military organisation led to a certain amount of competition and caused some problems of military discipline. In a letter written to his brother Antoine, Etienne de Villaret recounts how the 'master-at-arms Adjutant Kiehl' attached to the same school was 'threatened in uniform by Japanese soldiers, drunk, it is true, but in uniform and in a military enclosure' [Private archives of Mme de Villaret, letter dated 9 September 1886]. The Captain then goes on to expose the imbroglio of military decisions, reflecting the political stakes between the nations.

If, for him, the French and German officers were 'absolutely independent of each other', this was not the case for the German ambassador Von Holleben, who is said to have affirmed, in front of the Russian ambassador, that 'Commandant Berthaut was absolutely subordinate to Colonel Meckel' and that the latter was his 'direct superior' [Mme de Villaret's private archives, letter dated 9 September 1886]. Moreover, he is said to have added that, in order to be 're-enlisted', Commandant Berthaut 'had to agree not to teach anything that did not conform to German ideas'. For Etienne de Villaret, 'we are serving here as a pedestal for the Germans and it would be more dignified to leave' [Mme de Villaret's private archives, letter of 9 September 1886]. His departure, a year later, with that of Joseph Kiehl, was therefore in some way a consequence of the deterioration of local political and military relations and reflects the rise of German power.

A certain continuity was nevertheless ensured by Captain Henry Lefebvre, who did not return to France until two years later, on 30 April 1889 [AN, Léonore database]. No doubt he took part in the writing of the military fencing manual which appeared the same year. For Baptiste Tavernier, the *Kenjutsu Kyōhan* is based on the translation of the French military manual. It is divided into three volumes; the foil or *Seiken-jutsu* (正剣術), the sword or *Guntō-jutsu* (軍刀術), and the bayonet or *Jūken-jutsu* (銃剣術) [Tavernier 2014: 66-71]. But a change would occur, according to Kanezaka Hiromichi [2007], reported by Baptiste Tavernier [2014: 66-71], with the arrival of Baron Ōkubo Haruno (大久保春野, 1846-1915), who was appointed director

of the Toyama infantry school in 1890. He is said to have decided to stop teaching fencing and bayonet from the French school to focus on Japanese teaching and to have entrusted the direction of this revision to Tsuda (津田, 1850-1907), a practitioner of *Sōjutsu* (槍術) – the technique of handling the Japanese spear – and *kenjutsu* (剣術).

However, this interpretation is questionable. On the one hand, Ōkubo Haruno is Francophile²³ and it seems difficult to think that he could have disowned this heritage if he was not ordered to do so. On the other hand, he only stayed at the head of the institution for one year [Maejima 2014]. Baptiste Tavernier's analysis shows that the distancing from the French teaching of military fencing was only achieved with the publication of the 1894 manual. A mixed form of fencing between Western and Japanese practice was then proposed. 'The *guntō-jutsu* of 1894 is thus a hybrid system that mixes the European sabre and the Japanese *gekken*' [Tavernier 2014: 71]. Nevertheless, it was not until 1907 that the next manual achieved the complete break. 'A new revision of the *Kenjutsu Kyōhan* was thus published in 1907, in which circular blows are abandoned in favour of the fury of kendo blows. From this edition onwards, forearm strikes gradually become ignored' [Tavernier 2014: 73].

The movement towards the Japanization of content thus takes place after Okubo's departure as director of the Toyama school. Four years later, the creation of the *Dai Nippon Butokukai* (大日本武徳会: the Society of the Greatest Japanese Martial Virtues), an organisation intended to codify the contents of the national fighting arts, definitively signs this widely shared desire to build a national identity based on an 'invented tradition' [Hobsbawm & Ranger 2006] – or rather, a *reinvented* one.

However, although the country was gradually disengaging from Western influence in terms of military physical training, its leaders still had in mind the increased efficiency that technical and technological modernisation could offer. Other military collaborations were also promoted, such as the one with Emile Bertin, the famous designer of warships for the Japanese fleet.

It is clear that games of influence were played at different levels in the Japanese administration. In 1908, the Minister of the Army (陸軍大

23 堀江提一郎 (大久保春野), Horie Teiichiro became Ohkubo Haruno or Ōkubo. Put in charge of the administration of the French language school in Yokohama in 1869. He came to France to learn military law. He stayed there for almost 5 years, until the end of 1875. In 1890, he was appointed director of the Toyama Military School (陸軍戸山学校) and the following year, director of the Officers' School and chief of staff of the 2nd division. He finished as an army general, the highest among French-speaking Japanese [Maejima 2014].

臣), Terauchi Masatake (寺内 正毅, 1852-1919), had a Francophile background. This soldier, who took part in the South-West War (Satsuma Rebellion) in 1877 where he lost the use of his right hand, had studied in Kyoto at a military school three years earlier and was therefore under French influence. He stayed in Paris from 1882 to 1886 and it seems difficult to believe that he had erased all these past experiences when, on his return, he joined the management team of the Imperial Japanese Army Academy (陸軍士官学校長), becoming its head from 1902 to 1911. But for the Minister of Education between, 1908 and 1911, Komatsu Eitarō (小松原 英太郎, 1852-1919), the German connection is asserted as he was stationed at the Japanese Consulate in Berlin from 1884 to 1887. Against the backdrop of increasing independence and militarisation, but also indoctrination of the Japanese population, intra-governmental struggles for influence played out, reinforced by an extremely hierarchical system. Not only was the French example of a state plagued by anarchist attacks and workers' strikes being pitted against that of a more orderly German nation, but there was also an opposition between the Ministry of the Army and the Ministry of Education.

Nevertheless, a kind of understanding is gradually emerged between the two. This game of autonomy with regard to the Western powers and the search for a national identity put the school battalion experiment in a very favourable position. However, whereas the European powers were quick to point out the limits of the school battalions, Japan, on the contrary, made them an instrument of power and a key element not only in its 'fascistization' of the country, but also in the diffusion of modern karate [Abe et al. 1992: 1-28].

3.3. Japanese school battalions: the *undōkai* (運動会?)

The *undōkai* (運動会) or school battalions have a long history in Europe. The Swiss Cadets of the 18th century and, above all, the German Turnen, some of whom took part in armed conflicts (such as in Holland, in 1846), served as a model. The French paradox was to introduce them officially in 1882 into the educational system as the Third Republic wanted to be democratic and opposed wars aggression²⁴. However, the military and above all political context explains this seemingly contradictory situation, which lasted about ten years [Loudcher 2011]. Reserved for children over the age of twelve, these battalions consisted of military training for pupils. Demonstrations were held during the week and on Sundays and, under the direction of soldiers assisted by their teachers. These included military exercises (parades, platoon schools) and sometimes even live firing. Yet, from 1886 onwards, opposition arose. The initial enthusiasm gave way to

24 Although a nationalist part of the government wanted a revenge war to take back the Alsace and the Lorraine region, property of the Prussians dating back to 1870.

criticism from teachers, parents and, above all, the military, who took offence at these 'childish antics'.

In Japan, the premises of these *undōkai* can be detected with the organisation of *rikigekai* (力芸会 – meetings for athletes) like the one that took place on 25 May 1878 in an agricultural school in Hokkaido in Sapporo. A second was held in 1882 at the law school attached to Meiji University (明治法律学校) and the following year at Tokyo University. Admittedly, one would have to detail their content to know to what extent they can really be called a school battalion. Once again, the temporal conjunction with the development of the hexagonal battalions raises the question of their influence.

Indeed, the Japanese government may have been aware of this experience in France quite early on. In 1884, the Minister of War, General Iwao Ōyama (大山巖, 1842-1916), led a mission of fourteen officers who spent two months visiting the various arms [*Le Matin*, 6 May 1884]. The general was well acquainted with the hexagonal operation since, three years earlier, when he was Minister of War, he had received a French delegation including La Peyrère at the *Shikan Gakko* in Tokyo. He was then 'surrounded by his staff, among whose officers [...] Messrs Osaka, Funakochi Nagamine and Ogouni' [La Peyrère 1883: 98]. Jules Chanoine, who was responsible for their visit to France, took them to many places, including Sedan.²⁵

Even more, two years later, Mr. A. Hamao, adviser to the Japanese Ministry of Public Instruction and chairman of the Fine Arts Commission, visited France. Under the leadership of M. Le Guénec, school inspector, he 'began his study tour with a visit to the Ecole normale des instituteurs de la Seine' [*Le Moniteur officiel de la gymnastique et de l'escrime* 1886]. The French inspector was the author of a book on gymnastics in school battalions, in which he devoted a whole chapter to the teaching of French boxing; in particular, he criticized the use of the four 'faces' boxing model in the school domain. However, as the Parisian schools and especially the Ecoles Normales were the most advanced at this paroxysmal moment of development of the school battalions, it is almost certain that Councillor Hamao witnessed a demonstration of 'four faces' boxing model either by teenagers or by adults.

Finally, if one more argument were needed to prove the knowledge of these school battalions in Japan, the testimony of Etienne de Villaret is decisive. On the one hand, the Captain was perfectly familiar with this model of Joinville on 'four faces' he had trained for six months at the school of gymnastics and fencing in 1876, two years after the

²⁵ Sedan is a very symbolic town because it was the area where the great defeat of the 1870s war took place and led to the French capitulation.

demonstration at the Faisanderie [AN, Léonore database]. On the other hand, in a letter written on 12 January 1885 in Tokyo to his brother asking him to carry out a certain number of 'commissions', he wrote: 'send me, if it exists, an instruction manual for the school battalions, a Japanese man has asked me for it' [Private archives of Mme de Villaret, letter of 12 January 1885]. Thus, there can be no doubt about it. This teaching method was known in Japan in the mid-1880s. Moreover, it is perhaps following this dispatch that the adviser Hamao was sent to Paris.

Did Joinville's 'four faces' boxing model spread through the French school battalions, which in turn influenced the development of *undōkai*? There is no evidence to support this hypothesis. Moreover, it was not Etienne de Villaret who could have spread this model in the military schools because his criticism is radical: 'I don't know if anyone is thinking of developing this vermin here', he exclaims [Mme de Villaret's private archives, letter of 12 January 1885]. Finally, the establishment of the pinans by Itosu Ankō took place at the end of the 19th century. Therefore, if there is a conjunction between the *undōkai*, the French school battalions and the Joinville model of boxing on four sides, it would rather be during the 1890s.

4 OKINAWA AND THE CONTEXT OF THE INVENTION OF MODERN KARATE

4.1 Japanese policy in the Ryukyu Islands

On the eve of the reforms led by the Minister of Education, Mori Arinori (森有礼, 1847-1889), education was the object of growing interest on the part of the Japanese authorities in Okinawa.²⁶ Its implementation followed the needs of a subtle policy of development and reinforcement of national identity in a very sensitive context which is particularly well reflected in the official trip of the Prime Minister Yamagata Aritomo (山縣有朋, 1838-1922). Here too the French heritage is present. The Prime Minister, although not bilingual, made a trip to Europe and particularly to France in 1879, at the height of the rise of Jules Ferry and the Republicans. He also forged very close links with Louis Emile Bertin in Japan. How can we not interpret the changes he made in the education system in the light of his personal history?

²⁶ He imposed six years of compulsory, coeducational schooling and the establishment of high schools for the training of an elite. Under his leadership, the central ministry took more control over the curriculum and emphasised neo-Confucian morality and national loyalty in the lower schools, while allowing some intellectual freedom in higher education.

The Prime Minister left Tokyo on 26 February 1886 and, after stopping off at Kagoshima and the island of Amami, arrived in the port of Naha on 3 March. In an increasingly tense international climate, the archipelago was a choice military location. The French and the British had colonies in South-East Asia, and China and Russia were still threatening empires, not to mention the development of Korea. Okinawa was therefore a key part of the defence system of the southern islands. However, although Yamagata Aritomo planned to establish conscription on the Japanese model (1873), he did not want to create a military garrison or even a simple regiment made up only of natives. In fact, conscription was only instituted late in Okinawa (1898) and there was never a regiment made up only of local conscripts. When the latter had to do their military service, they were dispersed and sent to the regiments established on *Kyūshū* (in particular to Kumamoto where the garrison was located). The method of integration was meant to be gradual and, above all, it aimed to not offend the Okinawans. This can be measured by the method developed in the field of education.

Thus, the Prime Minister's trip was mainly focused on the dissemination of the Japanese education system, to which he reserved his most important visits. On 3 March, Yamagata Aritomo visited the Shuri primary school. On the 4th he inspected the *Shihan Gakkō* (沖縄師範学校) or Okinawa Normal School. The best of this elite could go and study at Japanese universities in order to immerse themselves in Japanese science and culture and thus become its most fervent defenders once they returned to the Archipelago, particularly in the elementary classes. The teachers were therefore key elements and might easily be compared to the 'black hussars' of the French Republic.

To the famous words of General Chanzy who, in 1882, declared: 'Make us men, we will make soldiers of them!' is answered by the slogan developed by Yamagata Aritomo: 'one must have the patriotic fibre' or *aikokushin* (愛国心). But where republican France demanded secular and devoted citizens on the basis of voluntary adherence, the government policy supported by the Emperor developed indoctrination based on socio-cultural and religious foundations favourable to the exercise of hierarchical and vertical authority that did not support opposition [Abe et al. 1992: 1-28]. 'This nationalisation of an elitist culture, without any real popular base until then, is one of the major characteristics of Japan in the late nineteenth and early twentieth centuries' [Bougon 2011: 54-60]. In particular, it is the 'regional micro-nationalisms (*okuni-jiman*, the pride of the country, in the sense of region), on which the modern national feeling will be grafted' [Bougon 2011: 54-60].

From then on, the integration of Okinawans was intended to be gradual and above all smooth. The Prime Minister gave the necessary rules for language instruction to change from *Okinawaguchi* (the local dialect) to standardized Japanese. Still, the report states that it is not useful to copy

the Japanese curriculum in detail, but to adapt it to Okinawans in order to gradually bring it closer to the Japanese model [Kondou 1993: 37-51]. The 'Japanization' or *Yamatoka* (大和化) was on its way.

4.2. The development of gymnastics and undōkaï teaching in Okinawa

The consequences of the Prime Minister's visit in Okinawa were immediate. This was followed by a visit from Mori Arinori in 1887 [Maeshiro 1992: 294] who promoted school battalions:

Following Mori's visit, Miyako Island was the first (in the entire Okinawa prefecture) in 1887 (明治20年) to organize an undōkaï with the participation of the following elementary schools: Taira, Shimoji, Nishibe and Irabu. As for the main island of Okinawa the first organization dates back to 1889 (明治22年) and was held mainly in the following areas: city of Naha (那覇), district of Shimajiri (島尻) and district of Kunigami (国頭郡).²⁷ [Maeshiro 1993a: 293-302]

Little detail is available about the content of all these undōkaï. The one celebrated on the occasion of the victory over the Chinese in 1895 was attended by 7,765 school children from the main island of Okinawa. The total number of actors, including spectators, was an impressive 15,000 for the time and place [Maeshiro 1993a: 293-302]. There is no doubt that these *undōkaï* were part of the Japanese government's policy of strengthening national unity. Thus, on 19th September 1895, the Minister of War Ōyama Iwao (大山巖, 1842-1916) ordered that the student teachers of the Okinawa *Shihan Gakkō* Normal School (沖縄師範学校) who had graduated be required to undergo six weeks of military training. They were expected to participate in these patriotic demonstrations.

However, *tōde/karate* is not yet included in the curriculum, nor is it in the 1898 (明治年) or 1904 (明治年) curriculum. Little is known about the programmes of the next six undōkaï. In that of 1905, however, a first appearance of *tōde* (唐手 Chinese hand) is specified in the *Ryūkyū shimpō* (琉球新報) newspaper of 11 November²⁸ [Katekaru 2017: 109].

27 '明治20年の森の来島後、先島の宮古郡では平良、下地、西辺、伊良部の各小学校が連合した運動会が開催されている。4) 本島では明治22年から那覇・島尻郡、国頭郡の連合運動会が継続的に開催されるようになってきた。' translation by Christian Faurillon.

28 The word 'tōde' (唐手) appears in full in the 31st place of the activities. But there is no mention of which kata(s) were performed (or whether it was a kata), nor is there any mention of the time allowed for this exhibition. The programme only states that the participants are second and third year students.

During the 1910, a meeting in Okinawa is recounted in which a demonstration of *tōde/karate* is again noted. But other demonstrations at various gatherings (which could strongly resemble *undōkai*) had already evoked these practices [Maeshiro 1993a and b]. Thus, in 1904, a performance was organised by the youth association of the island of Miyako. The following year, in March, a demonstration of *tōde/karate* and *naginata* (glave) took place for a celebration in honour of Viscount Hōjō Ujiyuki. In July 1906 and 1907, the same youth association of Miyako Island organised a *tōde/karate* demonstration. On 26 October 1907, a similar performance was produced by the Shimajiri District Youth Association [Maeshiro 1993b: 377-386]. Furthermore, after introducing the practice in 1905 at the Okinawa Normal School in Shuri, meetings were held there in February and October 1908 and in June 1909 [Maeshiro 1993b: 377-386]. Other associations took over, such as the youth association of Goeku and Shuri or the one of the Ozato district [Maeshiro 1993b: 377-386].

The programme of the 1910 *undōkai* reveals a grandiose spectacle with no less than 20,251 students! Such performances were comparable to those that took place in France during the federal gymnastics festivals. Out of fifty different physical activities, six had names with purely military connotations and each one was given a precise numbering. The numerous exercises and demonstrations were carried out by schoolchildren over 12-13 years old and each performance was meticulously timed. For the first time, the presentation of a pinan kata (ピンアン) by the students of Shuri High School was annotated which lasted for seven minutes.

It was in this period that the basic katas were formalised. But to what extent did Itosu Ankō create and introduce them in these meetings?

Figure 5: Programme of the 1905 *undōkai*
[Katekaru, 2017]

回	演目	出場者
第1	遊技 忠誠義連	那覇尋常小1、2年
	遊技 たこ	首里尋常2、1年
第2	遊技 鳩ホッポ洗濯	首里尋常女1、2年
	遊技 竜と虎、酒島太郎	松山小2、1年
	遊技 うれしい今日、幼年祭	泊小1、2年
第3	遊技 かちへ山、調練	那覇幼稚園全体
	遊技 かちへ山、赤筋シャッポ	首里幼稚園
第4	遊技 体操 見返せは、竜と虎	甲辰小1、2年
	遊技 美容術	首里尋常小男3、4年
第5	遊技 体操	附属小全体
第6	遊技 美容術	那覇各小学校(尋常小3、4年)
第7	遊技 秋日本の景色	松山小3、4年
	遊技 方形行進	首里尋常恩納3、4年
第8	徒手体操	中学校1年
第9	体操 名隊異色の美姿術	首里高等小男全体
第10	体操 美容術	那覇高等小男全体
第11	円形遊戯	天記小全体
第12	徒歩競争	甲辰2、1年
第13	盲啞徒歩競争	甲辰3、4年
第14	二人連綿給	松山小1、2年
第15	裁縫用具整理	松山小3、4年
第16	徒歩競争	泊小3、4年
第17	徒歩競争	那覇尋常小3、4年
第18	徒歩競争	附属小全体
第19	福拾競争	首里尋常小男全体
第20	福拾競争	首里尋常小女全体
第21	日英同盤競争	首里高等小男全体
第22	支度競争	首里尋常小女全体
第23	二人連スプーンレース	天記小(選抜)
第24	徒歩競争四百米男	那覇小(選抜)
第25	徒歩四百米突	同上
第26	中隊教練	中学4、5年
第27	遊技 ショッツアス	首里高小女全体、首里工芸全体
第28	体操徒手	商業校
	製作演習	首里徒弟全体
第29	綱引	養秀小全体
第30	遊技	高等小女全体、聴講生全体
第31	唐手	県中学2、3年
第32	中隊教練	師範校全体
第33	スプーンレース	工芸学校3年
第34	腹取競争	高等女学校(選抜)
第35	徒歩競争 六百米突	首里徒弟校選手
第36	徒歩競争 千米突	養秀選手
第37	徒歩競争 千米突	医学生選手
第38	徒歩競争 六百米突	商業校選手
第39	徒歩競争 千米突	師範選手
第40	徒歩競争 六百米突	中学選手
第41	徒歩競争 千米突	中学選手

表-4 連合運動会のプログラム
出典：琉球新報，1905年11月11日の記事より作成)

5 THE OKINAWAN MELTING POT AND THE ORIGINAL MODEL OF A BASIC FOUR-SIDED COLLECTIVE COMBAT PRACTICE: THE PINANS

5.1. Itosu Ankō, trajectory and biographical elements

It is important to dwell on the trajectory of Itosu (last name 糸洲) Ankō (first name 安恒) because the character is, in many ways, a crystalliser of influences.²⁹ Born into a family of minor nobility in the village of Yamagawa (首里山川村), his aristocratic title is Itosu Chikudon Pechinn Ankō (糸洲筑登之親雲上安). Born between 1830 and 1832, he would die between 1914 and 1916. He passed imperial examinations called *kakyo* ((or)科擧) in Japanese and *kējū* (科擧) in Chinese, giving access to a senior state position, the first of which was that of *sōshi kuri* (双紙庫理 - 首里王府の役職), otherwise known as steward of the day-to-day affairs of the palace [Faurillon 2020]. At the age of twenty, he learned *tōde* (唐手) under Matsumura Sōkon (松村宗棍) (1809-1901) [Svinth 2001: 8-17]. The latter is considered the greatest of the masters of this art and is also known as 'Bushī' Matsumura. Itosu Ankō was part of a small circle of students along with Maki Chōchū (牧志朝忠), Itarashiki Chōchū (板良敷朝忠) and Asato Ankō (安里安恒).

It is not clear why he joined another master called Nagahama Chikudon Pechinn³⁰ (長浜筑登之親雲) also nicknamed Bushī Nagahama (武士長浜) who taught the so-called *Naha-te* method (那覇手) [Faurillon 2020]. Yet, in reality, these schools consist of sets of techniques gathered by an individual identified most often with a place, which, from the perspective of combat anthropology [Loudcher 2012], corresponds to the original time of the creation of a practice. Thus, Yamazaki of Naha (那覇の崎山), Matsumora of Tomari (泊の松茂良興作), Makishi of Shuri (首里の牧志) and many others are mentioned [Faurillon 2020]. For some, Itosu Ankō is also said to have learned the rudiments of Chinese martial arts from a man named Chán Nán (禪南), who is said to have been shipwrecked and housed, pending his repatriation, in the holding centre that was located in the village of Tomari [Faurillon 2020]. Eventually, his martial journey made him the first (known) master to have practiced the three styles later listed as *Shuri-te* (首里手), *Naha-te* (那覇手) and *Tomari-te* (泊手).

At the end of the Okinawa Kingdom becoming a Japanese prefecture (1879), Itosu Ankō had a fairly easy conversion from royal official to state official employed at the prefecture. He would resign from

29 Sometimes he is also called 'Yasutsune' (安恒) which is actually just the Japanese reading of the characters that make up his first name.

30 Aristocratic title.

this position in 1885 at the age of 54 and it is around this period that he would have started teaching *tōde* at home, thus training a first generation of students such as Yabu Kentsū (屋部憲通), Hanagusuku Chōmo or Hanashiro (花城長茂) and Kudeken Ken'yū (久手堅憲由). In addition, he taught it to the two brothers of the former royal family living in the Shuri district, Motobu Chōyū (本部朝勇) and Motobu Chōki (本部朝基). Several generations of students were thus to follow his teaching, the most famous of whom were Chibana Chōshin (知花朝信) in 1899, then Mabuni Kenwa (摩文仁賢和) in 1903 and Funakoshi Gichin (船越義珍) in 1900 [Funakoshi 2014].

His education enabled him to seize the opportunities generated by the great social and political upheavals in which he participated and to envisage the teaching of this practice which would only later be called *karate*.

5.2. Itosu Ankō and the 'invention' of basic katas

How did Itosu Ankō create these pinans and what were his sources? Even more, to what extent is he the real creator? According to some authors, traditional dances were an inspirational influence, such as the traditional Gojushiro kata influenced by classical Ryukyuan dance [Svinth 2001: 8-17]. For others, Itosu Ankō would have borrowed from certain ancient katas of Okinawan or Chinese origin such as *kushanku* (or *kusanku*), notably thanks to the teaching of his teacher Matsumura Sōkon [Quast 2015, 2016] who, himself, would have learned them in Beijing.

In any case, it seems quite clear that the creation of the pinans is fundamentally linked to the development of the school system and the need to formalise and simplify mass education. However, while it seems certain that Itosu Ankō worked with island education to gain permission to add *tōde* (唐手) to the physical education classes taught at Shuri Normal School [Miyagi 1987;³¹ Svinth 2001: 8-17; Maeshiro 1993a], the process of its acceptance and dissemination is still subject to conjecture.

The request is said to have been transmitted to the Japanese Ministry of National Education through Ogawa Shintarō (小川銀太郎) in a detailed report he made after visiting the school where Funakoshi Gichin taught 'at the very beginning of the century' [Funakoshi 2014: 63]. But while it is generally inferred that it took place between 1900 and 1902, since it was during this period that Ogawa Shintarō attained the position of Inspector General of National Education (文部省) for the Okinawa region, a doubt remains. In fact, it is Funakoshi Gichin

31 Okinawan by birth, former researcher affiliated with the Urasoe Museum and karate practitioner.

Figure 6:
Programme of the 1910 undōkai [Maeshiro, 1993b]

開院官同紀下敷遊達合大運動會		
明治44年12月18日、於：那覇海濱 轟下2区3部		
全プログラム	時間	演 技 団 体
歌代 唱歌合唱		全 体
1 各級演習	7分	那覇各小学校全体
2 人馬競争	5分	島尻県立学校全体
3 西、2分間体操 東、各級演習	7分	首里小学校全体
4 行進遊戯	7分	島尻各小学校尋常五、六、女全体
5 各級演習	7分	中頭部各小学校尋常四、男全体
6 スプーンレース	4分	師範学校女子部、那覇女子技藝学校
7 西、各級演習 東、各級演習	7分	田頭部各小学校尋常高等男全体
8 球送り	7分	中頭部各小学校高等女全体
9 兵式徒手体操	6分	国頭中頭部立学校全体
10 徒歩競争	2分	県内尋常小学校選手1校1人宛48人
11 同	2分	県内尋常小学校選手1校1人宛48人
12 各級演習	5分	島尻部各小学校尋常四、男全体
13 中隊教練	7分	中 学 校
14 玉子の多忙	2分	那覇各小学校女全体
15 明眼徒歩競争	2分	中頭部各小学校尋常五、六男101人
16 權 花	5分	島尻部各小学校尋常五、六男全体
17 兵式徒手体操	6分	中学校分枝養育学校全体
18 種物拾ひ	8分	師範学校附属小学校75人
19 お手玉	3分	首里女子小学校60人
20 徒手体操	7分	中頭部各小学校尋常五男全体
21 五色徒歩競争	3分	県内高等小学校男選手二区三郡各5人
22 旗取競争	4分	島尻部女子工業徒歩学校全体
23 球字体操	5分	島尻部各小学校高等一、二男全体
24 各級演習	7分	師範学校附属小学校全体
25 西、作業競争 東、遊花競争	10分	首里工業徒歩学校40人 女子校養育学校全体100人
26 旗体操	7分	那覇各小学校男全体
27 種物拾ひ	7分	中頭部各小学校尋常六男全体
28 方 舞	14分	高等女学校
29 兵式徒手体操	6分	那覇商業学校・水産学校
30 徒歩競争 ：六百米突	3分	県内高等小学校男選手各校1人宛
31 玉送り	7分	島尻部各小学校尋常四女全体
32 權 花	15分	島尻部各小学校男全体3140人
33 扇 手	7分	中 学 校
34 プロネージ	7分	那覇各小学校女全体
35 各級演習	7分	中頭部各小学校尋常四女全体
36 中隊教練	15分	師範学校全体
37 西、富士山 東、プロネージ	7分	首里女子小学校全体
38 各級演習及旗 飾体操	5分	島尻部各小学校尋常五、六男全体
39 野試合	8分	各 中 等 学 校 選 手
40 徒手体操	7分	中頭部各小学校高一、二、尋五六女全体
41 旗取競争	3分	国頭部各小学校尋常男100人
42 各級演習	5分	師 範 学 校
43 五色徒歩競争	3分	県内尋常小学校男選手二区三郡各5人
44 球字体操	7分	中頭部各小学校高一、二男全体
45 徒手体操	5分	島尻部各小学校高一、二、尋五六女全体
46 両身長徒歩競争	2分	那覇各小学校男70人
47 旗取競争	3分	中頭部各小学校尋常四男61人
48 旗取競争	3分	国頭部各小学校高等男100人
49 徒歩競争 ：六百米突	3分	中頭部各小学校高等男57人
50 徒歩競争 ：一千米突	4分	中等学校選手各校3人宛
天皇皇后陛下 万歳三唱		

* 『地球新報』明治43年11月30日記事より作成
 明治期の沖縄県における運動会に関する歴史的研究
 真栄城 勉
 琉球大学教育学部紀要 第一部・第二部(42): 293-302
 1993-03 University of the Ryukyus Repository

who gives this imprecise date, which has been used by many historians. Specifically, he ‘thinks’ that it was on the day of the festival for the investiture of Ogawa Shintarō as ‘director’ at the Okinawa *Shihan Gakkō* (沖縄師範学校) (Normal School) in 1901-1902 that ‘Itosu performed a kata’ [Funakoshi 1994: 110]. However, he fulfilled this function between 1897 and 1899 [Kondou 1993: 37-51].

Moreover, according to the official table, this investiture party took place in 1897 [Fujisawa 2019: 214]. Unless Ogawa Shintarō made his visit as headmaster and then produced his report afterwards as inspector, it is therefore possible that the introduction of *tōde* in these educational institutions predates 1900-1902. In any case, Funakoshi Gichin states that it was as a result of this visit that ‘karate was integrated into the training given at Daiichi Prefectural College and the Men’s Normal School’ [Funakoshi 2014: 63]. He even states that after securing ‘the joint agreement of Asatō and Itosu’, he took ‘the students in an official manner’ [Funakoshi 2014: 64]. Finally, Itosu Ankō’s involvement in the teaching and dissemination of *tōde* in the Okinawan education system is rather unclear. It is quite likely that these initiatives are more or less linked and result from a favourable context within which the action of a larger group gravitating around Itosu Ankō proves decisive.

5.3. A plural initiative

Thus, three men are likely to have played a role in the creation of the pinans with Itosu Ankō: Yabu Kentsū (屋部 憲通), Hanagusuku (長茂 花城) and Asato Ankō (安里 安恒). The latter, a friend of Itosu Ankō, accompanied the last king of the Ryūkyū in his exile in Tokyo. In fact, he frequented Japanese circles and also certainly those of Westerners too. In addition, he would have learned from Master Sekiguchi (関 口 某), the art of archery (弓術) and, from Master Megata Masachika (目賀田 雅周, ?-1895), horse riding. Now, the latter master was himself taught western-style riding (西洋馬術) by a French military instructor stationed in Yokohama (横浜市) – possibly Lieutenant Léon Descharmes – and received an instructor’s diploma (御充許) [Faurillon 2020]. Asato Ankō returned to Okinawa in 1892 and worked under Itosu Ankō, a great friend, according to Funakoshi Gichin. Nothing more is known about him [Faurillon 2020].

The most likely influence would come from Yabu Kentsū and, perhaps, Chōmo Hanashiro (Hanagusuku). Both enlisted in the Japanese army in November 1890 [Feldmann 2020]³² at a time when conscription was

32 Thomas Feldmann reproduces an article from an Okinawan daily newspaper, (see Figure 7 opposite) entitled *Ryūkyū Shimpō* [18 March 1932], with its translation, in which Yabu Kentsū discusses these memories. www.researchgate.net/publication/344378697_Whenever_Yabu_fought_he_always_won_A_short_story_about_Kentsu_Yabu%27s_military_education_in_Ryukyu_Shimpō_March_18_1932.

not yet mandatory. They were part of a group of ten young Okinawans who were sent to train in the 'Kōnodai' training camp [Feldmann 2020]. Yabu Kentsū received the rank of *Gunsō* (i.e. sergeant), and possibly that of *chusa* or 'lieutenant', which he is said to have earned in particular during the Sino-Japanese War (1894-1895), in which he actively participated with Hanashiro [Svinth 2001: 8-17]. Funakoshi Gichin briefly mentions this passage in the army:

During the Sino-Japanese War [of 1894-1895] a young man trained earnestly with Itosu [Ankoh] for several months before joining the army. When he was assigned to the Kumamoto Division, the division medical examiner, noticing his well-balanced muscular development, said, 'I hear you're from Okinawa. What martial art did you train in?' The recruit replied that farm labor was all he had ever done. But a friend who was with him blurted out, 'He's been practicing karate'. The doctor only murmured, 'I see, I see', but he was deeply impressed.

[Funakoshi 1988: 25-26]

Now, this training camp was a legacy of the NCO school that was established in 1870 in 'Ozaka' under the influence of the French. It took the name of '*kyōdōtai*' or 'corps des guides'. In 1885, it was transferred 'some distance from the capital, to Kōnodai (Konodai), on the Naritakaido, and provided the vast majority of the army's non-commissioned officers' [Villaret 1889: 158]. Although Etienne de Villaret does not specify that he worked there, it is obvious that general movements, if not French boxing exercises on all four faces, must have been taught there. Less than three years after his departure (one year for Captain Lefebvre), the two young Okinawans joined this camp. How can one imagine that they were not influenced in some way by the Western military heritage in their teaching once they returned to their island of origin? Especially since Yabu Kentsū seems to have taken up his post as a military instructor at the Okinawa *Shihan Gakkō* in 1897 [Okinawabugi karate 2017: 146], i.e., two years after the end of the Sino-Japanese war. However, it is the same year that Itosu Ankō would have made a demonstration in this establishment for the investiture of Ogawa Shintarō as director.

Later, it was attested that Yabu Kentsū was an instructor of military gymnastics in 1902 alongside Itosu Ankō, who was then teaching at a 'school in Shuri prefecture' [Hokama 1998: 88; Svinth 2001: 8-17]. However, he was absent for a year during the Russo-Japanese War (February 1904-September 1905), in which Chōmo Hanashiro also took part, before returning to teach at the Shuri Prefectural Normal School [Svinth 2001: 8-17]. Chōmo Hanashiro would have remained there until the death of Itosu Ankō in 1915.

However, according to Christian Faurillon, Yabu Kentsū did not hold the pinans in high esteem and preferred to practice kata *kushanku*. Did he subsequently lose interest in this basic teaching? Was it Chōmo Hanashiro who did most of the work in this direction? Another possibility concerning the creation of the pinans lies in the inspiration that these *undōkai* (the one of 1895 in particular) would have offered to Itosu Ankō; he could therefore have asked these two students for details of these military-type performances. A shadowy decade obscures this past (1890-1902).

In any case, in a context of growing warmongering, it seems that, after the school recognition of *tōde* which was to become karate, Itosu Ankō now sought to attract the attention of the Japanese military authorities. He published a well-known handwritten letter in 1908, entitled *Ten Precepts of Tōde – Tōde Jukun* (唐手心得十ヶ条).

In fact, it does not mention the Ministry of National Education once. The author focuses on 'Japanese military society' (軍人社会) [Faurillon 2020]; he then participates, by blindness or belief, in its 'fascistization' [Abe et al. 1992: 1-28]. From then on, one may wonder if a break with Funakoshi Gichin did not occur during this period. Indeed, the creator of the *shotokan* style has, it seems, a less warlike vision of karate than the one proposed by Itosu Ankō in this letter. Given this, would he not be the one to add the notion of 'do', i.e. 'way', to the name *karate*? Moreover, this research would bring him closer to Jigoro Kano when he settled in Tokyo after the First World War.³³ This distancing is also confirmed with the creation of the variant of the basic katas that he entitled *Heians* (平安). But the reasons for this are probably as much moral as patriotic or prosaic.³⁴

Nevertheless, one can also whether the 1908 letter was really produced by Itosu Ankō. One can, in fact, see in it the action of his students, notably Yabu Kentsū and Chōmo Hanashiro: their warlike past speaks in favour of this military orientation whereas that of Ankō Itosu,

33 It was from 1923 onwards that Funakoshi Gichin (船越 義珍) attended classes, focusing on Buddhist texts (仏教), and under the guidance of Furukawa Gyodo (古川 堯道 1872-1961), the father superior of the Enkakuji temple (円覚寺 慧訓 管長). This temple is located in the former shogunal city of Kamakura (鎌倉). This famous Buddhist monk is said to have exerted a great influence on Funakoshi Gichin which is said to have been reflected in various aspects of his teaching [Faurillon 2020].

34 On 25 October 1936, a meeting was held between the great masters of the time to ratify a *fait accompli* and thus officially confirm the adoption of the ideogram 空 (*kara*), generally translated as 'which comes from China', as 'empty hand'. This was a different character. The character 唐, which means China, can be read as *kara* or *tō*. The character 空 just means empty and does not have a connection with China. The characters were changed.



Figure 7:
Reproduction of the article from an Okinawan daily newspaper, entitled Ryūkyū Shimpō, (18 March 1932), with its translation by Thomas Feldmann

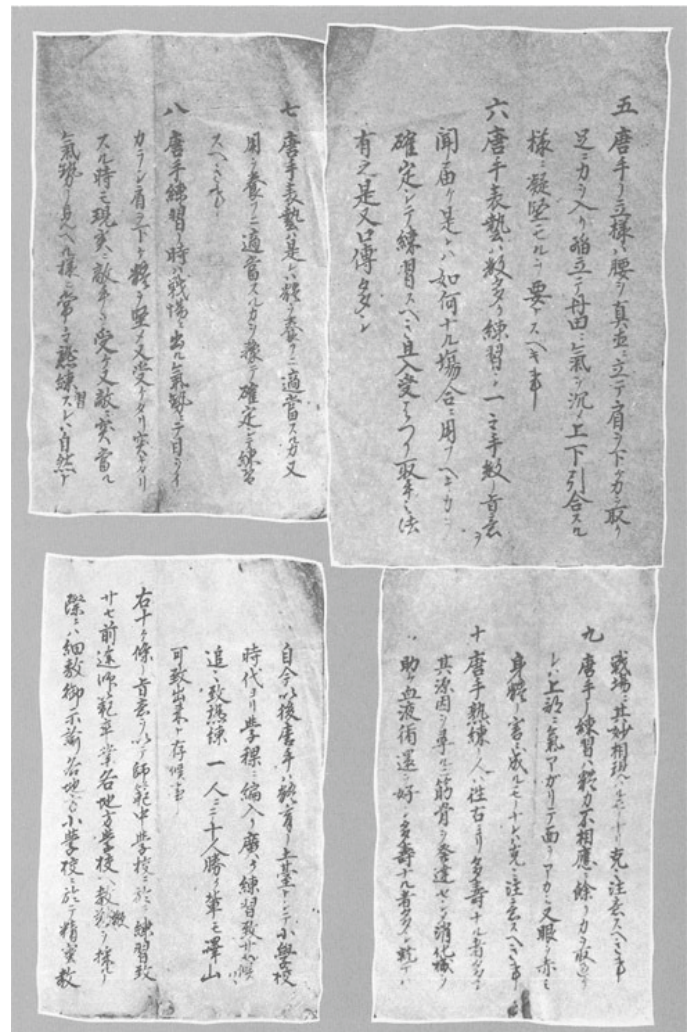


Figure 8:
Ito's Letter, ten precepts of todé Todé Jukun (唐手心得十ヶ条).

reported by Funakoshi Gichin through several anecdotes, pleads more for a behaviour of peace and persuasion than of confrontation and use of force.³⁵ Moreover, since Itosu Ankō came from a middle-class or 'pechin' family [Svinth 2001: 8-17] while his students came from a more noble lineage, could they not have 'persuaded' him to write this letter which they would have 'piloted'? Seven years later, Itosu Ankō passed away. Finally, the legends about karate's origins were free to become reality.

CONCLUSION

The search for the influence of French gymnastics and boxing, in particular Joinville's four sides model, on the development of modern karate led us quite far back in time in order to weave some occasionally tenuous links between two distant countries. What join them was the trajectory of men who, by strange twists of history, found themselves linked, and sometimes in a rather close manner, over a fairly long period. Although military influence was of primary importance, it should not be forgotten that this was always linked to other political, commercial, religious and cultural issues. From the relations established via the silkworm trade in the mid-1860s to the military aeronautical missions of the inter-war period, via the construction of military ships and education, exchanges were numerous and often dependent on the complexity of international relations in an Asian geopolitical context prey to strong warlike tensions.

Finally, through the history of the development of modern karate and the implementation of the so-called basic katas, a whole system leading to the 'fascistization' of the country can be seen. The story takes on a particular twist insofar as the extent of foreign influences in this destiny is considered. The military administrative system and the weight of the school battalions (*undōkai*) certainly contributed to the development of 'the gradual completion of the control apparatus required for a socio-political ideology' [Abe et al. 1992: 1-28].

Ultimately, what can we say about the influence of French gymnastics and boxing on modern karate? Certainly, the strong links between the military of each country that were established, the tangible and intangible war achievements (camps, manuals, etc.), the sending of specialists in physical exercises and weapons, etc., made it possible to forge 'Western' bodies and to make known these hexagonal practices of which the school battalions, military gymnastics and French boxing of Joinville on the four sides are part. But the latter does not seem to have

35 In particular, the passage titled 'Winning by Losing' [Funakoshi 2014: 72-81].

found a resonance in Japan during the Meiji era. It is in Okinawa that a certain meeting may have taken place between these two practices. However, there is no formal proof, in the current state of research, that there was a transfer of knowledge and/or skills, even if it is certain that Yabu Kentsū or Chōmo Hanashiro received military training from the French heritage. Did they see or participate in Joinville's French boxing training on four sides leading them to transform Itosu Ankō's *tōde* teaching? Similarly, no formal evidence has *identified* an influence of the collective military exercises observed on *undōkaï* practice in Tokyo and Okinawa although strong relationships exist with the development of katas in these islands. However, the diffusion of these practices, the temporal conjunctions, notably at the end and beginning of the 20th century, constitute a cluster of clues that seems to be consistent enough to lean towards one and/or the other of these interpretations. Further research is underway that will perhaps lead to more precise answers.³⁶

However, other hypotheses are still listed. It is possible that the many Japanese who came to France to train at Saint-Cyr, Fontainebleau or even at the Ecoles Normales [Maejima 2014] at this time, may have been informed of the Joinville boxing model. Official visits and inspections were also sources of inspiration, such as the visit of Prince Fushimi and Minister Yamagata on 11 May 1896 [Chanoine 1897: 171].

Did the French heritage stop there? An additional hypothesis concerns the influence of the kicking techniques of French boxing (*savate*) on those of modern karate.³⁷ Indeed, the range and level of kicks in karate is meagre until the inter-war period, whereas those of French boxing are diverse. It is not impossible that during later relations, such as the important military mission of aeronautics (1919 and 1922), and the increase in exchanges between the West and Japan, there were opportunities for transfers of body techniques. These avenues are still to be explored.

In any case, these possible French (and other Western influences) in the field of gymnastics and boxing were perfectly integrated into a Japanese society that was able to ensure a strong transition between tradition and modernity and thus create a true national practice; not without serious consequences, it is true.

36 The restrictions caused by the global pandemic in 2020-21 limited our ability to easily access military archives.

37 This hypothesis is evoked in particular by Jesse Enkamp in a video posted on YouTube in 2021 that went viral among the world of Japanese martial artists, with, of course, an anachronistic and disjointed summary of the historical narrative to enhance the visual aspect and attractiveness www.youtube.com/watch?v=sQUh5tVWd-E

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SELF-DEFENCE WITH A WALKING-STICK: REVISITED

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DOI

10.18573/mas.132

KEYWORDS

Walking stick, Blackthorn, Malacca cane, Bartitsu, Pierre Vigny, Barton-Wright, Jujutsu

CITATION

Brough, David. 2021. 'Self-Defence with a Walking Stick: Revisited'. *Martial Arts Studies* 11, 101-109.
doi: 10.18573/mas.132

ABSTRACT

Primarily an aid to assist mobility (or in the case of the umbrella, to stay dry) the walking stick also has a history as an object of considerable martial value. This article discusses the development of the walking stick as a martial art weapon within the British Isles over the last two centuries. From before the Victorian era the Irish Blackthorn was considered to be the best stick for self-defence purposes. In the late Victorian and Edwardian period the stylish fashion accessory, the Malacca cane, was the fulcrum of the cane fighting system developed by French Master at Arms Pierre Vigny. This was assimilated into the early British fighting system of *bartitsu*, developed by Edward William Barton-Wright. The walking stick persisted in the background throughout the development of jujutsu in the U.K. and further evolved with the introduction of Eastern fighting systems such as *hanbo jutsu* and *hapkido*. The last 20 years saw the bartitsu method undergo a renaissance following its rediscovery. Thus in the context of British jujutsu and self-defence, it may be considered that the walking stick has undergone several evolutions as a weapon, with each evolution reflecting distinct influences and ideals, and each one effective in the hands of the knowledgeable user.

Sometimes thought to be the preserve of Asian fighting systems, weapons-based martial arts also have a rich tradition and history in the West, including in Great Britain. It was in London, where, in the late Victorian and Edwardian eras, East met West to accelerate the development of mixed and hybrid empty hand and weapons fighting systems. For a long time, the English had established weapons training for military use, and for recreation, including fencing, singlestick and cudgel play, quarterstaff fencing, and bayonet fencing amongst the disciplines practised [Wolf 2005]. The walking stick and umbrella were also considered to have practical value as weapons. In 1835, de Berenger published *Helps and Hints How To Protect Life And Property* [de Berenger 1835]. Charles Random, Baron de Berenger was born in 1772, and as a noted marksman joined a company of rifle volunteers known as the Duke of Cumberland's Sharpshooters [Credland 2006]. The sharpshooters were established in response to the Napoleonic threat and de Berenger became notorious for his role in a stock exchange fraud in 1814 where he falsely let it be known that Napoleon was dead, resulting in the increase in value of stocks that were subsequently sold. de Berenger would serve a year in jail for this fraud [Credland 2006]. de Berenger was also an enthusiastic inventor and sportsman and became the proprietor of some land in Chelsea in 1930 that became known as the Stadium, which became a facility for his sporting interests [Credland 2006]. In his 1935 text, de Berenger writes about the use of the walking stick, and how it is used to great effect in the hands of an experienced broadsword man, and gives several illustrated examples of its use. de Berenger discusses the merits of various types of stick and states his own preference for the Irish blackthorn, in part for the protection offered to the knuckles by its many knobs [de Berenger 1835: 115]. de Berenger described a good grip to be light, and between the thumb and forefingers. A knob at the handle was considered useless and an impediment [de Berenger 1835: 116].

In describing one of his stick defences, de Berenger suggests, if you are nimble enough, filling your hand with the contents of your snuff-box, and throwing snuff in to the eyes of your attacker whilst hitting them in the head with your stick [de Berenger 1835: 124]. de Berenger's comments on the umbrella are that the point of an umbrella is useful in an emergency, and that an open umbrella could serve as a shield to hide your pulling a pistol out of your pocket [de Berenger 1835: 118]. Another application of opening an umbrella mentioned by the author was to dissuade a large, mad, dog from attacking him [de Berenger 1835: 118]. The self-defence capabilities of the walking stick and umbrella were again discussed in the later text *Broad-Sword and Single-Stick* by Allanson-Winn, first published in 1890 [Allanson-Winn 1911]. Rowland George Allanson-Winn, the 5th Baron Headley, was born in London in 1855 and was an enthusiast of boxing and the other combat exercises that were prevalent at the time. In 1913, Allanson-Winn converted from Catholicism to Islam and adopted the Muslim name

of Shaikh Rahmatullah al-Farooq. The following year Allanson-Winn established the British Muslim Society. In *Broad-Sword and Single-Stick* Allanson-Winn appraises the qualities of sticks made from different types of wood and also draws the conclusion that the Irish blackthorn is the preferred stick stating that it 'possesses all the strength of the oak, plus enormous toughness, and a pliability which makes it a truly charming weapon to work with' [Allanson-Winn 1911: 73]. As with de Berenger, Allanson-Winn relates the use of the stick to knowing how to use a sword [Allanson-Winn 1911: 75]. For practise with the stick, Allanson-Winn offers the following advice:

When walking along a country road it is a good plan to make cuts with your stick at weeds, etc., in the hedges, always using the true edge, i.e. if aiming at a certain part of a bramble or nettle, to cut at it, just as though you were using a sabre. By this sort of practise, which, by the way, is to be depreciated in a young plantation or in a friend's garden, you may greatly increase the accuracy of your eye.
[Allanson-Winn 1911: 76]

When describing the value of the umbrella as a weapon, Allanson-Winn acknowledges that it is of no use for hitting, as it lacks strength, but is effective for thrusting, prodding, and guarding [Allanson-Winn 1911: 78]. The wire ribs and soft covering of an umbrella, he suggests, guard against heavy blows when held with both hands, and can even be used to thwart the attack of a large powerful dog, which may spring at your throat [Allanson-Winn 1911: 78]. Allanson-Winn also mentions the shillalah (also often spelled shillelagh), a stick made from blackthorn, oak, ash, or hazel that was used for fighting by Irishmen. Strikes with the shillalah were delivered by twirling it around the head with the right arm, with the left forearm used to protect the left side of the head [Allanson-Winn 1911: 71]. Thus, the preferred walking stick for self-defence in Great Britain up to the late Victorian period was the Irish blackthorn, used in the way an Englishman would handle a sword. The umbrella was good for thrusting and guarding, and seemed to have several applications against dog attacks, which may have been a more common occurrence at the time.

ENTER EDWARD WILLIAM BARTON-WRIGHT

In Great Britain, the rudimentary use of an Irish Blackthorn could have remained the extent to which a walking stick was used for self-defence were it not for the efforts of a man called Edward William Barton-Wright (1860-1951) (Figure 1). An article by Graham Noble originally published in the *Journal of Asian Martial Arts* in 1999 and later reproduced in the first volume of the *Bartitsu Compendium* [Wolf 2005]

gives an account of Barton-Wright's life. Barton-Wright was born in India in 1860 to an English father and a Scottish mother. Following an education in Europe Barton-Wright embarked on a career as an engineer that took him to Japan in the mid-1890s. While in Japan, he spent his time learning jujutsu with several instructors, one of whom was Jigoro Kano, who at this time had been pioneering judo for more than a decade. Upon his return to England, Barton-Wright wrote a series of articles on self-defence, the first two of which appeared in *Pearson's Magazine* in 1899, both titled 'The New Art of Self-Defence'.

The first two articles, in the March and April editions of *Pearson's*, see Barton-Wright demonstrate some of the self-defence techniques he learned in Japan [Barton-Wright 1899a, 1899b]. In these articles, Barton-Wright can be seen demonstrating jujutsu techniques with a Japanese instructor [1899a, 1899b]. In the April article, Barton-Wright provides the name for his collective methods of self-defence as 'bartitsu', a portmanteau of his surname and the word 'jujitsu' [Barton-Wright 1899b]. Barton-Wright opened his 'Bartitsu School of Arms and Physical Culture', at 67B Shaftsbury Avenue in London [Black and White Budget 1900]. Through correspondence with Jigoro Kano, and perhaps others, Barton-Wright coordinated the arrival of several Japanese instructors to help deliver the teaching of jujutsu. The most notable of the Japanese were Yukio Tani and Sadakazu Uyenishi. In addition to jujutsu Barton-Wright determined that a fighting system could be improved by incorporating the best of the various systems he had studied, and seen, and thus invited instructors of other disciplines to teach at his club. These additional arts, including boxing, fencing, French kickboxing (*savate*), and most notably, a variety of savate that relied on fighting with a walking cane called *la canne* [Jennings and Delamont 2020], epitomised the eclectic collection of arts comprising the bartitsu system [Wolf 2005]. Jennings argues that creation in martial arts is born from moments of crisis [Jennings 2019]. The 'crisis' leading Barton-Wright to create bartitsu was the insecurity felt by London's middle and upper classes from muggings by working class roughs [Jennings 2019]. Indeed, the original members of the Bartitsu Club were all members of high society, and who together as a committee, led by William Grenfell (the First Baron Desborough) as their president, rigorously reviewed new members for their suitability of character, and ability to pay the fees [Wolf 2015].

To teach cane fighting Barton-Wright brought French Master of Arms Pierre Vigny to his club (Figure 2) [Black and White Budget 1900]. An article published in *Health and Strength* in 1904 provides a portrait of Pierre Vigny [Wolf 2005]. Vigny was born and educated in France. In 1886, Vigny served with the Second Regiment of French Artillery at Grenoble, where for three years he served as fencing master. He left the army in 1889 and opened a fencing academy in Geneva in Switzerland



Figure 1:
Picture of Edward William Barton-Wright from 'The
New Art of Self Defence' [Barton-Wright 1899a]

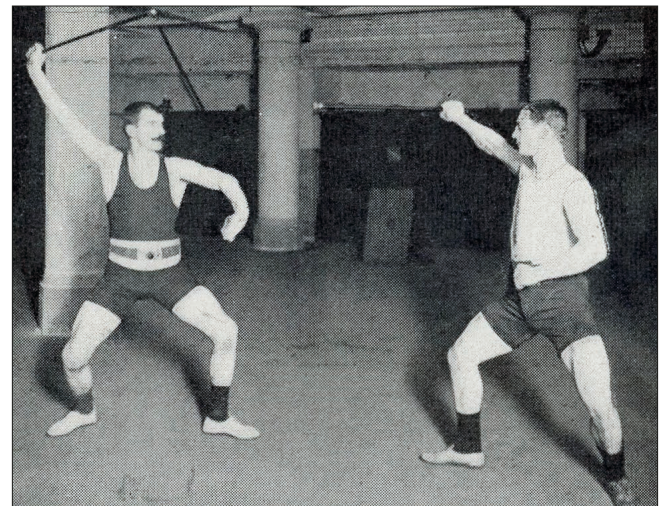


Figure 2:
Fighting with walking sticks at the Bartitsu Club with
instructors Vigny and Hubert [Black and White Budget 1900]

where he developed his system of cane fighting. In 1900, Vigny arrived in London and became a Chief Instructor at the Bartitsu School on Shaftsbury Avenue.

In 1901, Barton-Wright wrote a further two articles for *Pearson's Magazine*, this time focusing entirely on self-defence with a walking stick. In the first article, titled 'Self-Defence with a Walking-Stick' Barton-Wright draws some clear distinctions between sword or single stick fighting and fighting with a cane or walking stick [Barton-Wright 1901a]. Firstly, he points out that a cane has no hilt to guard the hand, and thus must be held such that an opponent's cane is deflected away from the hand. Further, the system devised by Vigny is just such a method and that he has assimilated it into his bartitsu fighting system [Barton-Wright 1901a]. He also describes how a cane should be held, with the thumb overlapping the fingers so that the cane is manipulated with the wrist and the blows delivered by swinging the hips, in contrast to the grip and movements practised in sword-play.

In a lecture to the Japan Society in 1901, Barton-Wright stated that the walking stick system of self-defence made it practically impossible for the fingers to be hit [Wolf 2005]. Rather than an Irish blackthorn, the stick previously favoured by the Englishman, Barton-Wright describes the formidable use of a Malacca cane [Barton-Wright 1901a]. Malacca (or rattan) is a flexible wood obtained from climbing palms and is named after its shipping port of Malacca City in Malaysia. In an article published in *Health and Strength* in 1903, Pierre Vigny comments on the fashion for owning a silver mounted Malacca cane and how useful it is for self-defence [Wolf 2005]. In the same article, Vigny describes how he has his own canes made out of Malacca and mounted with a thick metal ball for the handle [Wolf 2005]. Barton-Wright's first article on the walking stick method of self-defence goes on to illustrate a number of ways in which a Malacca cane can be used to defend oneself against an opponent also armed with a cane, but also includes a cane defence against a boxer, and against an expert kicker [Barton-Wright 1901a]. The defences illustrated in this first article consist mainly of guards, parries, and strikes, though several take-downs are also shown (e.g. Figure 3) [Barton-Wright 1901a].

In Barton-Wright's second article in 1901, also titled 'Self-defence with a Walking-stick' [Barton-Wright 1901b], we see more use of guards, strikes, and parries, with a straight cane. However, we also see defences using a hooked walking stick, where the crook of the handle is used to pull an opponent off balance by either pulling round their neck, or round their ankle. In this article, we also see an interesting evolution, which is the appearance of jujutsu techniques applied with the cane. For example, technique number 7 shows the bent arm lock, *ude-garami*, applied after a parry (Figure 4 overleaf). Do these techniques show

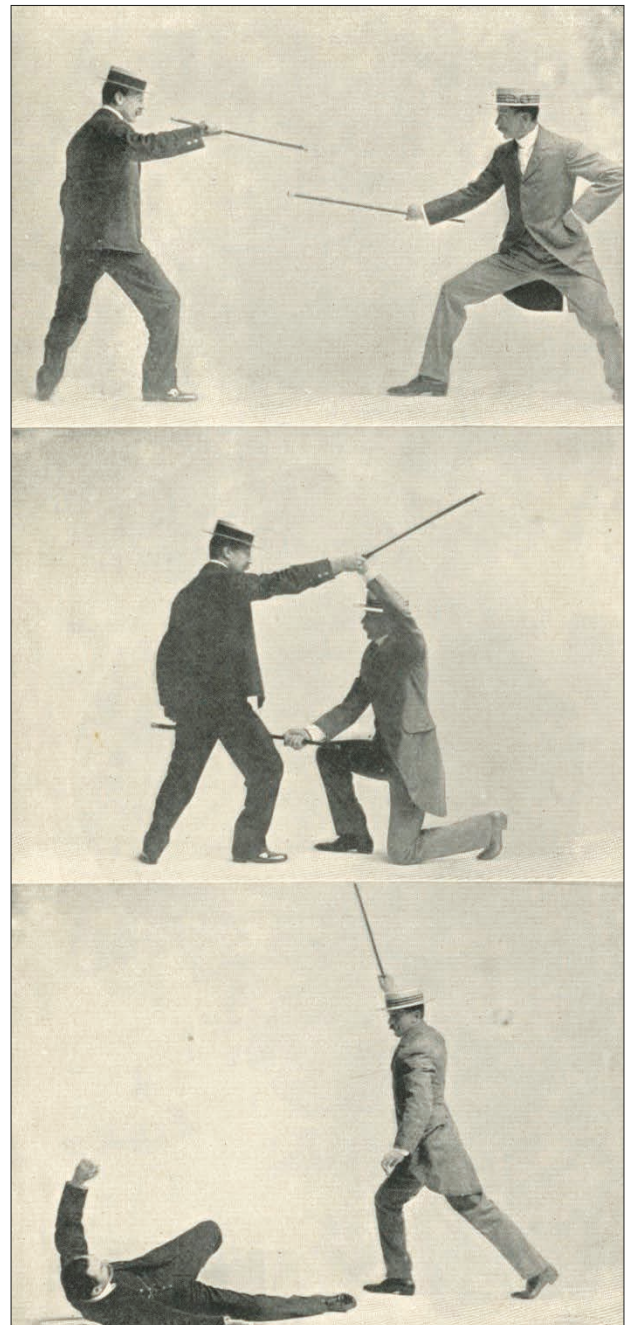


Figure 3:
Demonstration of a take down from 'Self-defence with a Walking-stick' called 'One of the best ways of knocking down a man in a general scrimmage when there is not room to swing a stick freely' [Barton-Wright 1901a].

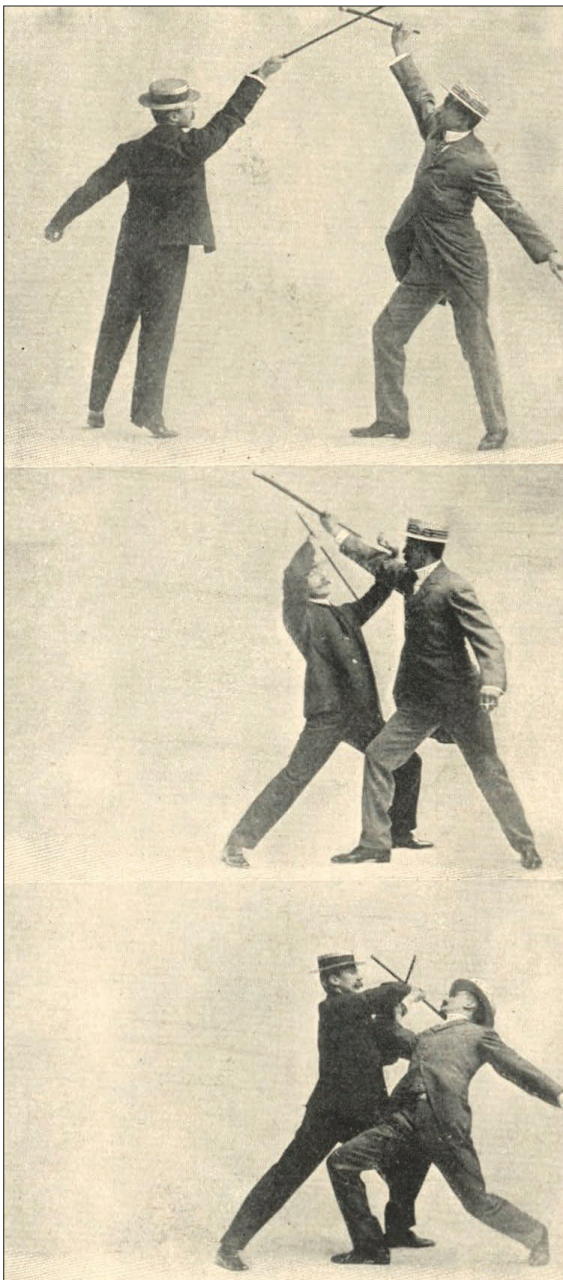


Figure 4:
Demonstration of ude-garami with a cane called 'Another way,
when armed with a light cane, to disarm and overpower an
opponent who carries a superior stick'
[Barton-Wright 1901b].

that Vigny and Barton-Wright, who trained intensively with jujutsu experts Tani and Uyenishi, started to hybridise use of the cane with jujutsu techniques? It would certainly be in keeping with the ethos of both Vigny and Barton-Wright who were driven to experiment and optimise their fighting systems. Indeed such an assertion is supported by an article written by a Captain F. C. Laing, who became a student of Barton-Wright's in 1901 whilst on furlough from the Bengal Infantry [Laing 1903]. In his article, Laing describes some basic cane fighting defences, and alludes to a future planned article where he would describe walking stick techniques combined with the falls and grips of jujutsu [Laing 1903].

By 1903, Barton-Wright's club had closed and he seems to have stepped back from practising martial arts as the popularity of jujutsu took off, with Tani and Uyenishi establishing their own dojos [Brough 2020]. The reasons for the closure of the Bartitsu Club are not clear, though we know that Barton-Wright and Tani were involved in a major row which may have precipitated Tani leaving [Bowen 2011: 134]. Barton-Wright was also reported to pay his Japanese instructors poorly [Bowen 2011: 136] and they realised they could earn more through the more effective promotion of William Bankier [Brough 2020]. Former student Percy Longhurst also suggested that the enrolment and tuition fees at the Bartitsu club were too high [Wolf 2005: 82]. For these reasons, and perhaps also because the popularity of jujutsu rapidly consigned bartitsu into the background, Barton-Wright pursued a fairly unsuccessful new career in electrotherapy [Wolf 2005: 63]. Vigny established his own club in London in 1903 where he continued to teach and give demonstrations until 1912 when he returned to Geneva to establish a self-defence academy [Wolf 2005]. In a 1904 portrait of Vigny in *Health and Strength*, the author, a certain J. St. A. Jewell, describes Vigny giving demonstrations with his wife, Marguerite Vigny, also known as Miss Sanderson [Wolf 2005]. An illustrated article published in *The Royal Magazine* in 1903 shows Marguerite Vigny demonstrating a number of self-defence techniques using an umbrella (Figure 5) [Fryers 1903]. The premise of the article is that a young hooligan is going to attack a woman as she leaves a house on Berners Street. Unfortunately for the hooligan, the house is number 18 Berners Street, Pierre Vigny's residence, and this woman is one of his best students. Similar defences with an umbrella feature in an article in the *Daily Express* in 1908, where a woman demonstrates a number of take-downs and strikes [Daily Express, 2 Sept. 1908: 7].

In *Jiu-jitsu and Other Methods of Self-defence* first published in 1906, author Percy Longhurst includes several illustrated examples of self-defence using a walking stick and an umbrella [Longhurst c1930]. Making specific reference to Vigny's system Longhurst states:

It is impossible to convey on paper any idea of the marvellous system of strokes and parries this master has evolved. Against one skilled in his system half a dozen assailants would be powerless, so effective is the use he teaches of an ordinary thick Malacca cane. Standing on guard with the feet in a line, he grasps his stick with a hand at either end, his arms being held above his head. Whether the blow will come from the right or left depends altogether on the attack he intends. The side of the head, elbow, throat, and knee are the usual points of attack, though perhaps his most effective stroke is a terrible upward slash at the inside of the legs.

[Longhurst c1930: 105]

Vigny's method of cane fighting would later appear in H.G. Lang's 1923 publication *The 'Walking stick' Method of Self-defence* [Lang 1923]. Lang, an officer in the Indian police, received recognition for his training of police officers and boy scouts in the walking stick method of self-defence in India [Lang 1923]. It was in 1920-1921 that Lang learned the Vigny method of stick fighting from Percy Rolt at his gymnasium in Brighton. Rolt had been a student at the Bartitsu Club in London [Wolf 2017]. In 1926 William Fairbairn, then of the Shanghai Municipal Police and later a military combatives instructor, published a book on self-defence called *Defendu* that contains a chapter on strikes, holds, and strangles, using a walking stick [Fairbairn 1926]. Like Vigny, Fairbairn describes the best class of stick as a Malacca cane [Fairbairn 1926].

There is little written evidence that the Japanese jujutsu instructors who passed through Barton-Wright's Bartitsu Club continued to teach the walking-stick as a method of self-defence though it is possible that they will have practised it at the Bartitsu Club. What seems clear however is that self-defence using a walking-stick persisted within the jujutsu clubs of the U.K. In the years either side of the World Wars it may be that walking-stick techniques were directly passed down from the first generation of instructors, or perhaps newer instructors picked it up from the literature published by Barton-Wright, Laing, Longhurst, Fairbairn, and Lang, and developed it further. In *Get Tough* by Fairbairn, a book on hand-to-hand combat taught to British and American commandos during WWII, a section titled 'Miscellaneous Advice' contains several ways of using a cane [Fairbairn 1942a]. Fairbairn also wrote a book called *Self Defence for Women and Girls*, in which he presents a sequence of six self-defence moves using an umbrella called the 'umbrella drill' which is followed by a description of the practical application of the moves [Fairbairn 1942b]. In 1942, American martial artist Charles Yerkow included a section on Vigny's method of walking stick defences in his book *Modern Judo: The Complete Jujitsu Library* and makes reference to its use by the Indian police suggesting he may have learned Vigny's methods from Lang's 1923 text [Yerkow 1943: 449].



Figure 5:
Defence shown as 'thrusting the point of her umbrella into his neck as he rushes at her', from Lady Versus Hooligan [Fryers 1903]

After WWII walking-stick defences continued to be practised within the jujutsu dojos of the U.K. For example, Liverpool based jujutsu teacher Eric Marshall started jujutsu in 1965 with local instructor Bert Roberts who taught him walking stick techniques [Keegan 2019: 126]. Roberts had been a student of Liverpool jujutsu teacher Gerald Skyner, who had been teaching since 1928 [Keegan 2019]. Eric Marshall incorporated the walking stick into his curriculum and in the 1970s performed demonstrations as part of the British Jujitsu Association team [Keegan 2019: 126] (Figure 6).

Furthermore, in this post-war period there was an explosion in interest in martial arts in the West. Many British martial artists now sought to broaden their martial experience by travelling to Japan and learning from Koryu Schools. For example, in the 1960s British martial artist Quintin Chambers travelled to Japan, where, amongst other experiences, trained with Masaaki Hatsumi learning Kukishin Ryu [Keegan 2019: 111]. In 1971, Chambers and Hatsumi published the English language book *Stick Fighting* [Chambers and Hatsumi 1981]. The techniques demonstrated in this book belong to the Kukishin Ryu and focus on the use of the hanbo, a stick that is typically 2 feet and 11 ¾ inches long, or the length of a walking stick [Chambers and Hatsumi 1981]. Experimentation and cross fertilisation of these stick fighting techniques (and similar to other styles such as the cane fighting of Korean martial art hapkido which was appearing in British martial arts culture (e.g. [Plumb 1990]), likely led to an expanded repertoire of walking stick techniques in U.K. dojos. There may even have been an influence of popular culture in that the character John Steed of the 1960s TV series *The Avengers* frequently used an umbrella to defend himself. The inspiration for the use of the umbrella in *The Avengers* could have come from the cane techniques demonstrated by William Fairbairn during WWII [Wolf 2016].

In the immediate years of the new millennium, the work of Barton-Wright, and other early pioneers, were rediscovered by martial arts enthusiasts, with these discoveries leading to the formation of the Bartitsu Society [Wolf 2021]. Members of the Bartitsu Society, such as Tony Wolf, started giving demonstrations and seminars on bartitsu, including the Vigny method of cane fighting (Figure 7) thus stimulating a rebirth of Barton-Wright's and Vigny's teachings and philosophy [Bowman 2021].



Figure 6:
Liverpool jujutsu instructor Eric Marshall teaching walking stick techniques in 2020



Figure 7:
Tony Wolf of the Bartitsu Society delivering a bartitsu seminar in Banff, Canada, 2006.

SUMMARY

Domaneschi conducted an ethnographic study of an Italian Wushu Kung Fu association with the aim of investigating in depth the relationship between habitus and materials [Domaneschi 2018]. Such a study of the walking stick in jujutsu is complicated. The walking stick or cane, as was practised as a weapon in Victorian England, is culturally European. The cultural features of a Japanese martial art do not easily apply. The cross fertilisation described above with Japanese influences leads to a hybrid of Eastern and Western influences, which is perhaps best described as an aspect of British (or European/Western) jujutsu which originated at the beginning of the twentieth century in London. Primarily for use as a walking aid, or as a fashion accessory in the Victorian and Edwardian eras of Great Britain, the walking stick (and umbrella) have thus found an additional use as a weapon. Starting with the Irish blackthorn where the techniques of defence were strikes familiar to the use of a sword. The Malacca cane of the Vigny system assimilated by bartitsu led to the experimentation with jujutsu and the cane.

Post WWII a further expansion of the cane-fighting repertoire was observed with an influence of Eastern weapons systems, and more recently, Barton-Wright's methods have undergone a renaissance. The walking stick and umbrella are some of the few potential self-defence tools that can be carried legally in the U.K. and that one may have readily to hand in the event of an attack. Further, the U.K. climate dictates that many people carry an umbrella, and in an ever-aging society, where the chances are that at some point in our lives we will require a walking stick, there may be real value in learning self-defence techniques with a walking stick earlier in life. This is in addition to the value obtained from preserving a cultural heritage. There are also examples of instances in recent times where the walking stick has been used for self-defence. Well into his seventies, and with a six-inch titanium plate in his neck, senior British jujutsu teacher Jimmy Pape was attacked in a case of road rage in a car park. Jimmy successfully defended himself with one strike of his walking stick [Brough 2019]. Showing that the advice of de Berenger and Allanson-Winn is as sound today as it was when first published, the stick used by Jimmy was an Irish blackthorn [Allanson-Winn 1890; de Berenger 1835].

Acknowledgements

Many thanks to Tony Wolf of the Bartitsu Society for useful discussions, ideas, and feedback.

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KRAV MAGA

HISTORY, REPRESENTATION, AND GLOBALIZATION OF A SELF-DEFENSE SYSTEM FROM ISRAEL

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DOI

10.18573/mas.127

KEYWORDS

Krav Maga, self-defense, muscular Judaism, globalization, nationalism and martial arts, solidification of tradition

CITATION

Schaflechner, Jürgen. 2021. 'Krav Maga: History, Representation, and Globalization of a Self-Defense System from Israel'. *Martial Arts Studies* 11, 110-121.
doi: 10.18573/mas.127

ABSTRACT

Krav maga ('close combat') is a 'no-rules' self-defense practice, which has over the last thirty years become increasingly popular in gyms, martial art dojos, and combat sports centers all over the world. My research shows how stereotypes of 'Israeliness' and myths of an undefeated Israel Defense Force (IDF) have become key elements of krav maga's global promotion. The article describes how first-generation instructors react to krav maga's global increase in popularity, a dynamic I understand as a form of 'solidification'. This article provides a cultural studies approach mapping out the various tropes that produce krav maga as a globally recognizable signifier for self-defense.

INTRODUCTION

Krav maga (Hebrew ‘close combat’, literally ‘touch fighting’) is a practice of ‘no-rules’ self-defense, which has become increasingly popular in recent decades.¹ Krav Maga classes are nowadays offered at fitness gyms, university sports centers, and martial arts schools. It is advertised as teaching simple and easy techniques that work in uncontrollable violent environments [Imi and Yanilov 2003]. Imi Lichtenfeld (1910–1998), a Jewish wrestler and boxer from Bratislava, developed krav maga during his time in the Israeli Defense Force (IDF) and made it available to civilians in 1964. A few decades later, krav maga has turned into a global brand that is often associated with practical yet dirty fighting techniques. This article analyzes its increase in popularity. Along with studying the literature, including its paratexts [Genette 1991], I base this study on my personal experience as a krav maga student in five different schools in the US, Canada, Germany, Austria, and Israel, as well as on a sequence of semi-structured interviews with around 35 practitioners and teachers. My interest in krav maga at this point is not primarily phenomenological [for such an approach, see: Cohen 2010], but using rather a discursive analysis to show how mytho-histories [Malkki 1995] produce bodily practices and how embodied exercises reinforce mytho-histories.

I will first introduce krav maga’s history and its globalization utilizing interviews with some of its prominent founding figures. In a second step, I will look at how the practice is represented and promoted today. This will demonstrate the ways in which self-defense practice concepts are linked to muscular Judaism, mytho-histories about Israel’s defensive military, and stereotypes about ‘Israeliness’. Finally, I will show how the global proliferation of krav maga as a signifier for self-defense has caused some instructors to solidify their style as the only ‘real’ krav maga.

HISTORY OF KRAV MAGA²

It is widely accepted today that Emrich (Imi) Lichtenfeld (1910–1998), also called Imi Sde-Or, was the founding figure of krav maga. Lichtenfeld was born in Budapest in 1910 but grew up in Bratislava, where his father established one of the first gyms in what was then Czechoslovakia. Lichtenfeld trained, competed, and achieved international championships in gymnastics, boxing, and wrestling.

With the increasing number of Jewish settlements in Palestine, new immigrants started to organize in a paramilitary fashion leading to the establishment of the Hagana (‘the defense’), the first armed unit in 1920. People such as Gershon Kofler, Yehuda Marcus, and Moshe Feldenkrais (who is otherwise better known for the Feldenkrais methods, an alternative therapeutic body exercise system), were vital for the formation of kapap (*Krav panim el panim* ‘face to face combat’). This combat system taught stick fighting as well as the principles of jiu-jitsu, boxing, and wrestling. In 1944 two years after Lichtenfeld had immigrated to Palestine, he started to work as a combat instructor in the Hagana, where he taught Jewish settlers in hand-to-hand combat. This included techniques of knife fighting and knife defense techniques. After creating Israel’s state in 1948 and the subsequent unification of the Hagana into the Israeli Defense Force (IDF), kapap and krav maga were adopted by the army. In the early 1950s, Lichtenfeld took on the head instructor’s post in the Infantry and School of Combat Fitness of the IDF, where he taught close combat and physical training. During these years, Lichtenfeld systematically developed krav maga.

In 1964 Lichtenfeld left the army and started to teach krav maga to civilians in two locations: Tel Aviv and Netanya. Initially, he kept the military-style dress code in his school but later began to use judo uniforms instead. Lichtenfeld also divided the krav maga curriculum into separate units, which corresponded to a belt system modeled after traditional judo. From then onwards, specific techniques needed to be trained and mastered to progress and receive a graduation belt. This teaching method stayed in place until around 1984 when the krav maga curriculum was reformed by Lichtenfeld and Eyal Yanilov. Under the Israeli sports authorities’ auspices, Lichtenfeld taught three instructor training courses at the Wingate Institute for Physical Education and Sport (Netanya) in 1972, 1975, and 1976. These six-week long courses produced the first generation of KM teachers in Israel.

1 This, however, excludes the Islamic World, where krav maga schools are rarely found. A good visualization of this distribution is provided by the IKMF page showing its locations worldwide: <https://kravmaga-ikmf.com/locations/>

2 I want to thank Eyal Yanilov and Avi Moyal, who commented on an earlier version of this subchapter. I also would like to thank Dafna Inbar for helping me with the interviews in Hebrew.

In 1978 Lichtenfeld established the Israeli Krav Maga Association (IKMA), a non-profit public benefit organization to teach civilians. In Israel, such organizations need at least 11 members to have non-profit status and to become eligible for public donations. Therefore, Lichtenfeld assembled 10 of his senior students to create the IKMA, which became the first krav maga organization. In 1984, however, the IKMA's first split occurred when Yaron Lichtenstein, one of Lichtenfeld's earliest students, left the Israeli Krav Maga Association to form his organization called BUKAN. In 1987 another former student of Lichtenfeld, Eli Avikzar, opened a new branch of krav maga called Krav Magen Israeli (KAMI). According to Eyal Yanilov, who was present at the meeting, the split occurred due to a disagreement between Lichtenfeld and Avikzar on issues regarding the curriculum. Following the dispute, Avikzar founded KAMI, a form of krav maga with a stronger emphasis on judo and aikido. Avikzar also trademarked the name Krav Magen Israeli to assure quality control (see below). Whatever dispute had taken place, it was settled later, as Lichtenfeld graduated Avikzar to an 8th degree black belt in the year 1996.

Lichtenfeld continued to consult with heads of the krav maga training program in the IDF during the 60s and the 70s. In the late 80s, one of Yanilov's students was appointed chief krav maga instructor within the IDF. From this moment onwards, civilian and special forces training directly influenced the army programs from where it had originated. This produced a circular movement which has lasted until today. Civil krav maga practices and developments are reintroduced into the IDF training program, and IDF techniques are taught in courses. When the first intifada (1987-1993) started to sweep across the green line, it increased the demand for individual self-defense in Israel, helping krav maga to more popularity.

The Split of the IKMA and the Diversification of Krav Maga

According to my conversations with Eyal Yanilov (president of Krav Maga Global, KMG) and Avi Moyal (president of International Krav Maga Federation, IKMF), the first half of the 1990s saw many conflicts amongst Lichtenfeld's senior students. As stated by Yanilov, some of the problems had arisen due to mismanagement, disagreements about the curriculum, and a poorly organized instructor course which had been taught in the year 1992 by Imi Lichtenfeld, Haim Zut, and Haim Gidon (two of his senior students). The fallout from this course led to a variety of arguments that produced unbridgeable disagreements, causing the breakup of the IKMA in 1995. Avi Moyal remembers that after his return from the army (1985-1990), the senior instructors around Lichtenfeld had already splintered into different fractions. The dispute pertained to differences concerning particular techniques (mainly gun-defenses) and the curriculum's arrangement. In an attempt to bring

people back together, Lichtenfeld made Moyal the new secretary of the IKMA. Today, Moyal says that Lichtenfeld picked him because his five-year absence in the army had kept him from taking sides with regard to the infighting.

The actual split of the IKMA occurred during a budget meeting in December 1995, which led to the creation of three separate groups: 1. The International Krav Maga Federation (IKMF) was established a year later in 1996 and organized, amongst others, by Gabi Noah, Avi Moyal, and Eyal Yanilov. 2. The remains of the IKMA, were taken over by Haim Gidon and his students who rebranded it under the name Gidon System. 3. Haim Zut Krav Maga and Kapap, which was established by Haim Zut (1935-2020). The events that led to this split are contentious. In interviews with Eyal Yanilov, Avi Moyal, and Haim Gidon – who were all present at the 1995 meeting – I heard different versions of why the IKMA split. They agree, however, that Haim Zut (who was also present at the meeting) provided the most accurate description of the reasons for the break on his homepage:

The main subjects of contention were the management of the organization, differences in opinion over the efficacy of techniques, struggles over individual stature. These internal conflicts became the impetus for the creation of several splinter organizations teaching Krav Maga with and without quality control.

['History', n.d.]

By 1996, 32 years after Lichtenfeld decided to leave the army and teach krav maga to civilians, the system had split into five different groups foregrounding different styles and techniques. This fracture of a formerly more or less homogeneous community, originally united by its founder Imi Lichtenfeld, led many instructors to foreground their styles as the only proper one and the only one that could be life-saving in a violent altercation.

Krav Maga Goes Global

Processes of globalization are marked by an increasing speed of movement of goods and communications. These trigger deterritorialization processes [Deleuze and Guattari 2013] and dynamics of flows [Appadurai 2016], which, in the case of krav maga, help the detachment of individual practices from spatial locations [Woodward 2014]. As we have seen, the globalization of krav maga was not the reason for the shattering of a unified krav maga body. Splits had already occurred before going global. Its international success, however, leads, in the eyes of many, to what Žižek calls a 'demise of symbolic efficiency' [Žižek 2000: 388]. This absence of any central commission exacerbated

differences. It caused various groups to foreground differences in technique and lineage for the sake of making their version of krav maga stand out on the market (what I will describe as dynamics of solidification below).

Curiously, the globalization of krav maga is directly connected to a weight-loss method called *SlimFast*. Daniel Abraham, the CEO of *SlimFast*, had moved to Israel around the late 1970s, where he trained with Raffael Elgarisi, a senior instructor under Lichtenfeld in the IKMA. According to Yamilov, Abraham was impressed and organized a group of 6 IKMA instructors to visit the US and present krav maga to US-American Jewish communities. In 1981 Abraham paid for a five-week-long trip where Lichtenfeld and five students (Yamilov, Barak, Avikzer, Elgarisi, and Maymon) visited Jewish Community Centers in 11 different cities in the US and even appeared on TV. Yamilov and Maymon were also invited to demonstrate at the FBI headquarters in New York City and Quantico.

Abraham also organized the first group of martial arts students and instructors from the US to fly to Israel and take part in a six-week-long instructor course in Netanya taught by Maymon and Yamilov. These individuals started teaching in the US, which was the beginning of krav maga's spread in North America. While some instructors started their own organization, others stayed affiliated with the IKMA. One of the most prominent organizations in the US today is Krav Maga Worldwide (KMW, led by Daren Levine), associated with the IKMF until 1999. KMW instructors, for example, would receive their diplomas through the IKMF and both organizations worked together on promotion videos. However, a rift emerged between the two groups when KMW started to teach what some in the IKMF saw as 'technical mistakes' in the field of gun defenses. The split resulted in a lawsuit that unfolded between the KMW and the IKMF concerning the use of the krav maga logo. The IKMF represented by Yamilov eventually won the case. It is not clear how KMW sees this rift, as Darren Levine, the head of the KMW, was not available for a statement.

Around the beginning of the 1990s, krav maga began to emerge as an international project. While the first krav maga school had already opened in Paris in 1988 under the auspices of the IKMA (taught by Richard Douieb), the IKMF systematically expanded in Europe. In the middle of the 1990s, Yamilov started to teach in Scandinavian countries. In 2010, Yamilov split from the IKMF and established his branch called Krav Maga Global (KMG). While Moyal (IKMF) and Yamilov (KMG) have different opinions on this split's origins, both agree that personal, organizational, and financial issues were the main reasons.

Due to the various schools, branches, and locations, it is not easy to know how many people study krav maga today. Avi Moyal told me that

the IKMF has around 4000 instructors worldwide, and Eyal Yamilov estimates that there are about 1500 instructors in KMG, each teaching approximately 20 to 30 students. Most of these instructors and schools are outside Israel. For example, Krav Maga Worldwide has no Israeli branch, KMG has ten active instructors in Israel, and the IKMF has only 16. Only KAMI has more instructors in Israel (around 350) than abroad (about 50). This is significant when we consider the global promotions of krav maga.

PROMOTING KRAV MAGA IN A GLOBALIZED WORLD

When we speak of representations, we often seem to think that some entity out there is represented in one way or another. In what follows, I want to argue differently and emphasize how there is no Archimedean point where we would be able to 'neutrally' look at krav maga as an entity traveling through time and space. On the contrary, it tends to stand in for many (at times conflicting) interpretations that clash or complement each other on the global market. De-essentializing krav maga, both as a practice and a discursive name, is not merely an academic exercise. Instead, it shows that when dealing with martial arts and self-defense, we never really only talk about punching, kicking, and (in the case of krav maga) biting.

Krav Maga as the Essence of 'Israeliness'³

In 2017, the *New York Times* published an article on krav maga featuring (among others) Paul Szyarto, a US businessman, fitness coach, and the producer of a documentary film on the Israeli self-defense system. In the article, Szyarto is quoted saying that for him, the hand combat system 'encapsulates the essence of Israeliness: resourcefulness, versatility, and a mindset of doing whatever it takes to win' [New York Times 30 Dec. 2017]. The *New York Times* article does not provide any further explanation of Szyarto's interpretation of the somewhat ambiguous term 'Israeliness'. Another interview featuring the self-proclaimed fitness CEO sheds light on his understanding of the link between krav maga and the Israeli people:

The Israeli people are incredibly resilient [...] Their history, for thousands of years, has been one of survival, whether in places like Bratislava or the Jerusalem Hills. They hate fighting, yet they often face no choice. And if they must fight, they do so with a sense of ethics and fearlessness that prevents bad

³ 'Israeliness' is, of course, quite a contentious political concept and thus has been marked as such by my use of the inverted comma.

decisions and outcomes. We can apply the same Krav Maga principles to everyday situations in our own lives as police officers, soldiers, athletes, and executives [...] Krav Maga is a self-defense system that perfectly encapsulates the three-fold mindset that is the Israeli way of life: Lethal violence only as a last resort, meticulous preparedness, and fearless, purposeful, constant action under great pressure.
[Cult Hub 10 Dec. 2017]

To Szyarto, Israelis are a distinct group whose way of life is marked by an involuntary martial identity. As a system of defensive attacks that skillfully neutralize an aggressor. Krav maga thus emerges as the bodily habitus of a thousand-year-old people who have no other choice than to fight. In other words, Israelis are ethical and fearless in the face of outside aggression.

Such and similar statements do not exist in a void but are characteristic for a whole discourse that explains krav maga as inherently Israeli. Guy Mor, a professor at Shanghai University of Sport, for example, argues that it should be declared an 'intangible cultural heritage of Israel' as it 'underpins a sense of Israeli national identity' [Mor 2019a: 295-296]. Mor also connects self-defense practices to Israeli culture and calls for more research on how krav maga is 'linked to the cultural heritage of the Jewish people' [Mor 2019a: 295]. However, a straightforward association between an Israeli people and krav maga's *telos* as their bodily expression outside nationalist projections is difficult to maintain.

Historians of nationalism have shown how relatively recently invented traditions often appear in ancient identities' guise [Gellner 1972, Anderson 2006, Hobsbawm and Ranger 2012]. With the rise of nationalism around the nineteenth-century, historians were eager to fill large gaps between ancient times and the modern era. Their work helped produce a nation's continuous history, shuffle former societal taxonomies, and build new associations based on shared identities such as language or religion. Since Zionism and notions of a homogenous community have their roots in European nationalism, the historical *telos* of a Jewish people as a distinct thousand-year-old ethnic group is also contested [Sand and Lotan 2010, Sternhell 2009]. Similarly, 'Israeliness' – like any other 'imagined community' [Anderson 2006] – is a somewhat elusive concept. The sociologist Baruch Kimmerling writes in his book *The Invention and the Decline of Israeliness* [Kimmerling 2005] that while the Yishuv society (pre-Israel Jewish communities in Palestine) might once have been relatively homogenous, the incoming of settlers, as well as the treatment of the Arab population, made questions about 'who is an Israeli' and what constitutes 'Israeliness' in a moot point. Separated into several different cultures, languages, and religious practices, 'Israeliness' fails as an encompassing description of the people living within the (contested) borders of Israel and, thus, as a way to describe krav maga.

To understand Szyarto's and Mor's explanations of krav maga as 'the essence of Israeliness' or as a 'cultural heritage of Israel', we need to look at discourses of 'muscular Judaism', a term emerging towards the end of the 19th century. Presner traces this image of the firm (masculine) muscular Jewish body back to the second Zionist Congress in 1898 when Max Nordau, Theodor Herzl's physician, called for a new orientation in physical and moral strength, which he considered necessary for a Zionist return to Palestine [Presner 2007: 1]. The aim of 'muscular Judaism' was to rebrand the Jewish community as a martial people, with the ability to protect their personal and national interests in the advent of Zionism. This political and aesthetic project was linked to canonized Jewish heroes, such as Samson or Judas Maccabeus (Lichtenfeld's second krav maga school in Netanya was called 'Samson Gym'). However, the new Jewish manliness was also a contentious category, as it built on stereotypes of east European Jewry. While eastern communities were considered 'authentic' Jewish in keeping with Judaic traditions, they were simultaneously also imagined as too physically weak for a nationalistic Zionist endeavor. For Presner, the birth of the muscular Jew, therefore, lies at an uncomfortable crossroads between social Darwinist and nationalist discourses [Presner 2007: 4]. This masculinity crisis is not unique to the Jewish body but has its parallel in the ideology of muscular Christianity, similarly emerging towards the end of the 19th century. Muscular Christianity also turned towards physical fitness and increasingly portrayed Jesus as an athlete instead of an ascetic [Greve 2018]. Discourses on muscular Christianity likely influenced muscular Judaism [Mor 2019b].

In one of his earlier works, Slavoj Žižek tackles how what he calls nodal points can organize a relatively heterogeneous field (such as in our case, 'Israeliness'). In his 1989 piece 'Che Vuoi?' he describes a process in which the brand Marlboro serves as a nodal point to connote and provide a specific ideological vision of America. 'America' as a term standing in for various meanings and representations (similar to 'Israeliness'), thus was organized in the Marlboro campaign as, for example, the land of the free, adventurous cowboys, and unlimited possibilities. In Žižek's example, Marlboro unifies the heterogeneous associations with 'America' into a more homogenous field of references [Žižek 1989: 105-108]. Similarly, Szyarto and Mor organize an ambivalent 'Israeliness' into a more coherent set through the nodal point of krav maga. The self-defense system thus provides a link between Israeli national identity and Israel's military culture. Presner elaborates on this when he writes that particularly the 1967 war proved that 'Jewishness' was not associated with physically weak intellectuals anymore, but with decisive and muscular 'Tzabar' Jews (men and women born in the land of Israel and the British Mandate of Palestine), who were heroically fighting for their country. '[B]eing-Jewish-in-the-world' became 'characterized by toughness, aggressiveness, and battle-readiness', and krav maga was the way to make this known globally

[Presner 2007: xvii]. When Szyarto and Mor speak of krav maga, they speak of more than merely a variety of kicks and punches. For them, it condenses 'Israeliness' with its readiness to fight, its offense-defense, and its culture of civilian-militarism [Kimmerling 2005]. Understanding Israeli identity through krav maga, we will see in the following, is produced on the backdrop of Jewish-Palestinian conflicts and the exclusion of Arabs living in Israel.

Krav Maga as the Art of the Underdog and Military Oppression

Aside from discourses of involuntary martial people, krav maga is also often promoted as the underdog's art. According to many who knew him personally, Lichtenfeld used his fighting skills to protect the small Jewish community from anti-Semites and Nazi attacks in Bratislava. Tropes of emancipating and protecting the weak are thus tied to the system's foundational myth. In the following, I will show another metonymical link where krav maga's emancipatory potential is associated with individual nationalistic interpretations of Israel's military power. However, such and similar tropes conceal how krav maga is also utilized in the Palestinian people's oppression in the occupied territories. To first establish what I mean when speaking of an 'underdog trope', I will use the help of a famous Hollywood depiction of krav maga.

The thriller *Enough* [2002] with Jennifer Lopez portrays an abusive relationship. In it, Slim, a waitress, is physically and mentally mishandled by her husband, Mitch, who threatens to take her daughter away. Slim flees from her husband and tries to get the help of a lawyer who informs her that no legal procedure exists that would protect her from the influence of her well-connected husband. Cornered and afraid of losing her daughter, Slim sees no other way than to fight Mitch physically. But Slim has only one month until she will have to face Mitch again in a custody hearing. In other words, the waitress has to learn how to fight a bigger and stronger opponent within a matter of a few weeks. The typical protagonist-turns-fighter montage shows various characteristic krav maga techniques, including knees to the groin, choke escapes, and eye gouges. The montage is accompanied by a dialogical voiceover featuring a conversation between Slim and her instructor, in which the two reflect on some of the mental lessons taught. *Enough* climaxes in a violent altercation between Slim and her abusive husband in which she utilizes her new skills to defeat and eventually kill Mitch.

Classical martial arts or boxing films often represent the perseverance and victory of the protagonists' 'troubled masculinity' [Woodward 2014: 115]. *Enough*, however, depicts a troubled female lead who has no other choice than to revert to physical violence. The film stays true

to the genre's typical good versus evil storyline. While classical martial arts films would feature tropes of resilient masculinity, *Enough* shows a woman who emancipates herself through violence, in spite of her physical weakness. While the film did not receive much praise from its critics, the action scenes and the subsequent highlighting of krav maga in interviews with Lopez exposed the Israeli self-defense system to a wide range of audiences.⁴ *Enough* promotes its image as a simple and effective self-defense system that Slim masters within a short time. The message is clear: Even a weaker opponent can neutralize the threat of a much stronger aggressor.

From where does such power come? How do some representatives and spokespersons legitimize Krav Maga's dominance in the absence of any verification process (such as competitions)? A comment by Bas Rutten, a famous three-time Mixed Martial Arts heavyweight champion who also trained Krav Maga, may help to shed some light on this question:

As for self-defense, I think that krav maga is pretty much the best system out there. Why? They teach it to soldiers in Israel. In Israel, they got to have the best army in the world. They are under attack 24/7.
[*'Bas Bites: Krav Maga'* 2015]

Rutten establishes a direct link between Israel's defensive military victories ('they got to have the best army in the world') and krav maga as a self-defense technique. In such promotions, its effectiveness is directly linked to the IDF's military history. As we have seen above, krav maga has its historical roots in the Hagana and the later established Israeli Defense Force (IDF). According to Avi Moyal, the IKMF still has close contact with some Israeli special forces and adapts its curriculum according to their input. There is, therefore, an undeniable link between krav maga and the IDF. Yet to directly derive its efficiency from the IDF's military victories is problematic, however. Most of Israel's wars were not won through the army's superior hand-to-hand combat skills. I argue that such and similar representations build on nationalist narratives of Israel's small yet highly effective defensive force. In these discourses, Israel is outnumbered compared to its Arab neighbors and with its back to the sea. This gives the small country no other chance but to defend itself than through smart (preemptive) attacks.

Images of an Israel under attack protected by the victorious IDF and its heroic soldiers are widespread in Israel's popular culture. Ella Shohat

4 See for example here: https://www.youtube.com/watch?v=8o-heFnT1gY&ab_channel=KravMagaNY

describes this heroic nationalistic genre [Shohat 1989], which featured prominently in Israeli cinema after 1948 and later resurfaced after the 1967 war [Ben-David 2009]. This trope of a David vs. Goliath fight is prominently present in the memories of the 1967 war, which is most charged with messianic sentiments for nationalistic Israelis. An interview conducted with an Israeli veteran on this topic in 2020 can exemplify this:

[In 1967] the whole Arab community went behind Nasar, and all Arabs were happy since they thought that the Jewish state would be wiped out. But when they saw the miracles that took place [in the 1967 war], I can't tell you what were all the things that took place, but within six days, Israel had the upper hand in Syria, in Jordan, in Lebanon, in the Sinai, in Egypt and then the whole world opened their eyes you see. Israel being such a small country that on the world map, you only have a dot that Israel did all of this. Now slowly, they know the power of Israel. People open their eyes now, and they know they can't go against Israel.

However, the notion of Israel's wars as miraculous (and messianic) self-defense has been criticized by Israeli post-Zionist historians. In the 1990s, authors such as Simha Flapan [Flapan 1983], Avi Shlaim [Shlaim 1988], or Ilan Pappé [Pappé 2014] started to question a large body of hegemonic narratives regarding Israel's establishment and its subsequent wars. For example, they challenged the idea that the 1948 war was an Israeli David versus a pan-Arab Goliath situation. Pappé wrote that the Arab armies would not be able to 'endure for more than a brief period on the battlefield' [Pappé 2014: 117]. These post-Zionist scholars had a significant impact on Israel's military history's nationalist narratives and started to criticize the discourse of the 'right to self-defense'. Kuntsman and Stein, for example, write that such nationalist views ignore Palestinian civilian casualties in the conflict and support the increasing disappearance of discussions on Israel's occupation in the country's public spheres [Kuntsman and Stein 2015].

The metonymical link between the Israeli military and krav maga techniques is undoubtedly a unique selling point compared to other self-defense systems. To derive krav maga's effectiveness from the IDF's military victories, however, is problematic as hand-to-hand combat plays a minor role in Israel's wars. Krav maga techniques, however, contribute to the ongoing occupation of the West Bank, where soldiers utilize its techniques for controlling the Palestinian population. At this point, we encounter another ambivalence: On the one hand, krav maga's foundational myth is tightly linked to a time when Lichtenfeld fought against fascism and anti-Semitism in the streets of Bratislava. On the other hand, its association with the IDF connects krav maga

to the day-to-day practices of military oppression. Such links are mainly missing in the system's global promotion. It is not surprising, therefore, that some voices condemn krav maga as 'enabling war crimes' or as a practice which 'condon[es] the oppression of Palestine' and subsequently protest its uncritical consumption [Preoccupied Territory n.d.]. In continuation to what has been said before, I need to add that krav maga not only works as a nodal point capturing the elusive 'Israeliness' as an intrinsically martial Jewish project but also forges the heterogeneous and often conflicting Jewish-Israeli identities into a more unified body against an outside Palestinian/Arab threat.

SOLIDIFICATION OF KRAV MAGA

The following section demonstrates how some first-generation instructors reacted to krav maga's stellar ascent and attempted to take control of its various interpretations. The rapid increase of schools and studios worldwide (aside from Islamic countries), together with the fact that the name 'krav maga' is not trademarked, has caused a proliferation of meanings and practices (a few of which have been shown above), which according to some instructors, are spurious and even dangerous. David Khan, a black belt in the IKMA, describes this in one of his publications: 'people do not know what they do not know. Subpar krav maga may be viewed as competent krav maga because people do not know the difference' [Khan 2020: 4]. I will describe this struggle of reinstalling an 'authentic' tradition in the face of krav maga's demise of symbolic efficiency [Žižek 2000] as a dynamic of *solidification*.

I already used the theoretical-methodological lens of solidification in my 2018 book on ritual and salvific practices at a Hindu pilgrimage site in Baluchistan [Schaflechner 2018]. What seems like an odd choice at first glance emerges from what I consider to be a widespread ethnographic problem, namely: 'How is it possible to organize a field of voices in which everyone lays claim to speak "the truth"?' [Schaflechner 2018: 17]. 'Truth' in this regard aims to foreground elements that have (or strive to have) a constitutive and *grounding* role for the phenomenon under investigation. While my work in Baluchistan asked how religious authorities validate or repudiate certain rituals' potential to provide their performers with salvation (*moksha*), the krav maga authorities I interviewed (and studied with) would not claim anything of less importance: For many, the question of which krav maga one practices is simply a matter of life and death as the wrongly exercised moves would lead to injury and, in the worst case, to the loss of life. Within such contexts, 'solidification' is a metaphor for the strategies (narrative and embodied) to counter its demise in symbolic efficiency by representing one's particular understanding as the universal Truth. With regard

to krav maga such discourses foreground the specific relation to the founder Imi Lichtenfeld as a way to unlock the system's universal scientific potential. To understand this seeming contradiction, I first need to show some of the main criticisms hurled at krav maga.

Krav Maga as *Bullshido*

One reason for krav maga's international fame is its appearance in choreographed fighting scenes for Hollywood productions. Action films such as *Collateral* with Tom Cruise, *Blood Diamond* with Leonard DiCaprio, the recent James Bond films, or, as shown above, *Enough* with Jennifer Lopez prominently feature krav maga techniques [Joost 2020]. Like the Keysi Fighting Method [KFM], krav maga also received a popularity boost when it was picked up by Hollywood and its celebrities [Bowman 2014]. This has made krav maga increasingly visible globally and has also led to ridicule from within combat sports and martial arts circles [Khan 2020:1].⁵ There it is mocked as *bullshido*, a term implying inefficient and fake martial art.

Some schools' excessive flirtation with cinematic elements has significantly contributed to this mockery. Instructor Roy Elghanayan is an example of this. Elghanayan is also called 'the Bruce Lee of krav maga', a title he earned through his shows, which are often performed in front of large audiences. Besides having his own school with branches worldwide, Roy works as an actor, a stuntman, and a fight-choreographer. With its fast pace movements, acrobatics, and even costumes, Elghanayan's krav maga demonstrations closely resemble cinematic action scenes. Roy always features as the protagonist of these encounters and makes his attackers fly through the air with his stylized moves, such as flying armbars, tornado kicks, and the disarming of people carrying guns. Many videos are accompanied by heavy guitar riffs or electronic music for increased effect.⁶ Opinions starkly differ on Elghanayan's performances and his role in krav maga. While his

5 The discussion about fake or real martial arts is certainly not confined to krav maga. Especially online discussions are excessive and cannot be adequately portrayed here. An overview of criticisms against but also a defense of Krav Maga is provided in this thread: https://www.reddit.com/r/kravmaga/comments/k3w2zy/anybody_else_noticed_the_main_rmartialarts_sub/ [last accessed January 2021]

6 Elghanayan, however, also utilizes action film effects to add intensity to his teaching in class. For example, in one instructional video, Roy is shown teaching a group of students without an audience. When demonstrating new techniques in front of the class, Elghanayan stomps the ground. Simultaneously, punching, which, together with his forceful exhaling while executing a punch, provides audio intensity to his movements [https://www.youtube.com/watch?v=7fms3Jyvt2U [last accessed January 2021]]

students and followers praise Roy, his teaching and demonstrations have also been ridiculed. One senior krav maga instructor I met in Israel labeled him 'a clown' and added in one of our talks that he thinks that people like Roy make it hard for the krav maga community to be taken seriously. Internet platforms such as Reddit also discuss Elghanayan and his positive or dubious effect on krav maga's reputation. The YouTube comment sections for Roy's videos (in cases where they are turned on) also reveal this divide and feature, at times, scathing views of his work.

A further point of contention concerns krav maga's lack of competition outside the IDF [IDF 2014]. Players of combat sports with a traditionally strong competitive side – such as MMA, Muay Thai, or Brazilian Jiu-Jitsu – argue that the absence of contests makes quality control impossible. Such criticism is accentuated through highly mediatized Mixed Martial Arts (MMA) contests such as the Ultimate Fighting Championship (UFC) or Bellator. The UFC, for example, advertises their competitions with slogans such as 'as real as it gets', aiming to foreground their commitment to genuine violent altercations.⁷ Responding to this criticism, krav maga instructors argue that any competition follows specific rules (the UFC, for example, allows no groin strikes, no biting, and no 12 to 6 elbows) and are by definition 'unreal.' In contrast, in street fights, everything is permitted.

Other criticisms stem from the notion that anybody can learn krav maga techniques in a relatively short time (one version of this trope is exhibited in the film *Enough*). Such disapproval is further kindled by programs offering courses entirely online or providing instructor certificates after minimal training. For example, one online course promotes itself as teaching customers how to become a 'Real Tough Warrior' within only 7 hours of watching their video on demand.⁸ One German krav maga school offers instructor certificates to people based on a one-week intensive training without requiring any prior martial arts knowledge.⁹ Such promotions kindle the condemnation of the whole field, as critics would claim that the necessary muscle memory could simply not be achieved to instantaneously react in violent altercations without years of conditioning.

7 On the 'reality' of such highly mediatized events, see Downey [2014]

8 <https://www.udemy.com/course/the-complete-course-for-krav-maga/>

9 They, however, 'recommend' some former martial experience <https://kravmaga-ausbildung.de/krav-maga-instructor-90> [last accessed January 2021]

**'Authentic' Krav Maga:
Particular Relationships and Universal Principles**¹⁰

The dynamics of solidification are continuous and ongoing. However, they are most apparent when a tradition's grounding elements have been put into question [Schaflechner 2020]. Krav Maga's globalization brought a variety of deterritorializing dynamics [Deleuze and Guattari 2013], which not only made it known outside Israel and the IDF, but, according to many instructors, also caused misunderstandings and misrepresentation. How does the krav maga community react in the light of such controversy? In other words, how do some of them solidify their style of teaching in the face of its global demise of symbolic efficiency? In the following, I will show how the solidification of krav maga navigates between people's connection with its founder, Imi Lichtenfeld, and the development of the system's alleged 'universal principles' [Draheim 2017].

**Continuation of a Lineage:
Israeli Krav Maga Association (Gidon System)**

'I am concerned for the future of krav maga' [Khan 2020]. This is how David Khan, the head of the Israeli Krav Maga Association in the US, starts the first chapter of his latest book. Khan has been studying and teaching krav maga for many decades and received his black belt from Haim Gidon, one of Lichtenfeld's senior students. Khan has authored various books on krav maga and has taught military and police units in the United States. His latest publication directly addresses what he sees as its current problem.

Imi Lichtenfeld created too formidable a fighting method for it to be relegated to a pile of self-defense and exercise fads [...] With krav maga's rapid commercialization and the spread of McDojos [fake krav maga schools] offering krav maga, the US military and law enforcement communities now understandably view krav maga somewhat skeptically. Krav maga is also increasingly disparaged in varying degrees by professional mixed martial arts (MMA) fighters [...] The tragedy is that some lives may be lost, along with people sustaining serious injuries because many current charlatan krav maga instructors do not understand what tactics work in real situations.
[Khan 2020: 1]

10 I am conscious that this subheading features mainly 'expert' voices and I hope to come back to provide some of the intriguing views of krav maga students in a future publication.

What is Khan's answer to this predicament? For him, the only way to teach authentic krav maga is through a teacher-student lineage reaching back to Imi Lichtenfeld. Khan writes that Haim Gidon, his teacher, is the 'highest-ranking krav maga instructor in the world' [Khan 2020: 2] and thus the foremost authority to 'evolve and improve' the self-defense system [Khan 2020: xxvi]. This is echoed on the IKMA's homepage, where it is stated that Lichtenfeld made Gidon into the 'top authority' to graduate students to black belts and higher dans [Israeli Krav Maga Association n.d.].

For him, the responsibility to keep the tradition authentic while adapting it to new threats lies with those studying under Gidon. The authenticity of the techniques presented in Khan's latest book is thus the direct result of Lichtenfeld's trust in Gidon. Khan also grants other high-ranking instructors who had been certified under Lichtenfeld this legitimacy [Khan 2020: 3]. However, proper krav maga can only be taught based on the IKMA Gidon System's curriculum.

Trademark and Institutionalization: Krav Magen Israeli (KAMI)

Krav Magen Israeli (KAMI) follows a similar, yet slightly different, path to authenticate its teachings. KAMI was established in 1989 when Eli Avikzar (1947-2004), Lichtenfeld's first student, opened his branch of krav maga and called it Krav Magen Israeli. Avikzar was Lichtenfeld's first black belt and taught self-defense for many years in the IDF. In a 2020 interview, Avi Abeceedon, the current head of KAMI, says that while discussions about the curriculum were one reason for the split, another was about the name. Avikzar changed 'maga' ('contact') to 'magen' ('shield') in an attempt to distinguish his school from others and trademark the name. Unlike krav maga, which can be used by anyone, Abeceedon says, people who want to teach KAMI need to undergo rigorous training. This includes courses at the Wingate Institute, a school for sports and physical education in Netanya, where future KAMI instructors learn about physiology, didactics, fitness, etc.¹¹ Today KAMI has branches in six different countries but is mainly active in Israel. According to one KAMI black belt, not pushing onto the international market was intentional to ensure quality control.

Like many other krav maga schools, KAMI promotes its self-defense

11 Wingate is home to some Israeli national teams, and its webpage states that 5000 students, scholars, and athletes come to the institute every day http://www.jewishsports.net/wingate_institute.htm [last accessed January 2021]

as being based on 'natural reactions'.¹² However, these natural reactions can only be trained in their unique facilities where they are continuously adapted to new threats. This is also the reason why, according to Abeceedon, other krav maga branches lag 30 years behind KAMI's curriculum. After Eli Avikzar's death, who used to be the main driving force behind KAMI's strive for improvement, it is now Abeceedon himself, responsible for overseeing KAMI's constant development.

This trope of the continuous evolution of one's school (in opposition to others) is quite familiar and has come up in almost all engagements with instructors and students. Like the IKMA, the tension between authenticity and the system's continuous evolution is eliminated through a link to Lichtenfeld. Avikzar's unique status as Lichtenfeld's first black belt grants Eli the ability to change the design without tainting its authenticity. KAMI's claim to teaching universal and 'natural reactions' is embodied through the particular link with its founder and KAMI's trademarked name as well as its link to the Wingate Institute.

Understanding Lichtenfeld's Systematicity: Krav Maga Global (KMG)

Krav Maga Global promotes its teaching style as 'authentic' through Eyal Yanilov's (KMG's founder) close relation to Imi Lichtenfeld. This connection is emphasized on the KMG's homepage, where it reads:

KMG's krav maga system is continuing to be developed by Imi's closest assistant, Master Eyal Yanilov, adapting it to meet the changing needs of civilians of all ages, military units, law enforcement officers, and security personnel. It is an evolving system, which provides novel solutions for dynamic situations. [Krav Maga Global n.d.]

According to Yanilov, however, it is not only the close relationship to Lichtenfeld that provides him with authority to develop [the system] krav maga. In some of our talks during the year 2020, Yanilov said that he became quite close with Lichtenfeld after their joint trip to the US at the beginning of the 1980s. However, the major shift in their relationship occurred when Eyal started studying engineering in Haifa and Tel Aviv. Based on his biomechanics training and exchange with Lichtenfeld, Yanilov developed a systemic approach to krav maga, which led to the installment of a new curriculum in 1987. From then

onwards, the program featured more technical training methods and introduced new belt levels. This change was solidified through practice and writing, which resulted in the first book on krav maga in 1992.

Yanilov not only closes the gap between development and authenticity through the title of being Imi's closest assistant. According to Eyal, Lichtenfeld kept continuously changing krav maga so that 'Imi was not teaching a system [but] he was the system'.¹³ In other words, the founder was not providing Yanilov with any special insight into krav maga's ontic core, but rather with an understating of his system of changing krav maga. Yanilov's contribution to curriculum development in the 1980s based on his engineering studies also supports his position. While during Imi's lifetime, changes were always run by krav maga's founder, after Lichtenfeld's death, Yanilov says, he added new practices to the curriculum based on Lichtenfeld's principles. Yanilov's understanding and coproduction of krav maga's structure guarantee that KMG is both authentically Lichtenfeld and adapting to new threats.

To sum up: In their attempts to solidify their tradition as an (or the only) authentic one, the first generation of krav maga instructors needed to tackle the tension between an individual instructor's relationship with Lichtenfeld and the system's alleged universal principles. For the IKMA and David Khan, it is Haim Gidon who, as 'the highest-ranking krav maga instructor in the world', has the power to 'steward krav maga's future progress' [Khan 2020: xxvi]. For Avi Abeceedon, Eli Avikzar, who, as Imi's first student, can adopt KAMI to new challenges. After Avikzar's death, Abeceedon inherited this responsibility and solidified it through its institutionalization at Wingate. Finally, for the KMG, Yanilov can properly further krav maga's development and adoption of new threats. This unique position stems from Yanilov's understanding of Lichtenfeld's way of changing the system and from his history of codesigning the krav maga curriculum during Imi's lifetime.

12 'Israeli combat system, based on natural reactions of the human body and excels in its [sic] simplicity and effectiveness' <https://www.kami.org.il/language/en/> [last accessed January 2021]

13 From a 2020 interview.

CONCLUSION

Krav maga's globalization, starting only thirty years ago, has been possible through Imi Lichtenfeld's senior students' efforts and through media representations. Some of these promotions advertise krav maga with stereotypes about Israel and its involuntary martial people. There, 'Israeliness' is captured with discourses of muscular Judaism and Tzabra Jewish identity. Other promotions highlight its close link to the IDF and tap into nationalist narratives describing an outnumbered yet determined Israeli military that defeated a much larger Arab opponent. These promotions claim an intrinsic metonymical link between Israeli military victories and krav maga's efficiency. However, such associations ignore how the IDF uses an alleged self-defense system in the Palestinian people's occupation and oppression. The system's stellar global ascent also led to a decline in its symbolic efficiency, causing various discussions about 'authentic' practice. Already split into different factions and often competing for student numbers, talks about 'real' krav maga and who owns it started to become more visible. Instigated by an increasing amount of mockery from the side of combat sports practitioners, krav maga schools and instructors of the first generation started to safeguard what they considered the authentic core of the practice. These dynamics of solidification oscillate between krav maga's universal principles and the interpretation of such through the personal link with the founder Imi Lichtenfeld.

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BOOK REVIEW

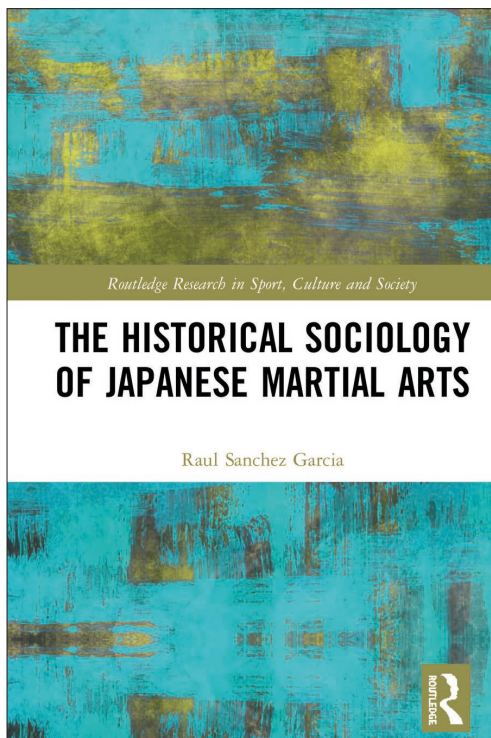
The Historical Sociology of Japanese Martial Arts

Raúl Sánchez García

Routledge, 2020

252 pages

£29 (paperback)



REVIEWER

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CITATION

Nakajima, Tetsuya. 2021. 'Book Review: The Historical Sociology of Japanese Martial Arts, by Raúl Sánchez García'. *Martial Arts Studies* 11. 122-126.

doi: 10.18573/mas.127

DOI

10.18573/mas.127

1 SOCIOLOGICAL RESEARCH INTO JAPANESE MARTIAL ARTS

The Historical Sociology of Japanese Martial Arts [Routledge 2018] contains a comprehensive history of Japanese martial arts compiled by Spanish historical sociologist Raúl Sánchez García. However, it is not simply an overview intended to introduce Japanese martial arts to the West. As may be construed from its receipt of the 2020 Norbert Elias Book Prize, the book deploys Norbert Elias's concept of the 'civilizing process' within a study of the field of Japanese martial arts. According to García, although Elias was particularly fascinated by the Japanese civilizing process, he concluded his research career without turning his attention to that country's iconic martial arts. García has developed his own career as a researcher in the path laid down by Elias' sociology, and this work displays a determination to tackle some of the challenges that Elias left unfinished.

However, García does not depend solely on Elias's arguments surrounding the civilizing process. The person who developed the thesis at the core of Elias's theory of a civilizing process – the 'controlled decontrolling of emotion' – was the Dutch sociologist Cas Wouters [Wouters 2007]. In the 1960s and 1970s, traditional Dutch society was disrupted by the arrival of the 'permissive society'. Wouters asserted that, even so, it remains possible to observe civilizing patterns, even in societies with unclear and diverse patterns of behavior. To substantiate his claims, Wouters proposed the binary of 'formalizing and informalizing', and analyzed the circumstances surrounding the transformational processes of the mutually expected self-restraint that existed between individuals and society. Wouters's informalizing is a concept created through the development of Elias's civilizing; however, García employs it in tandem with Elias's concept of civilizing, thereby establishing the four frameworks of civilizing–formalizing, decivilizing–formalizing, decivilizing–informalizing, and civilizing–informalizing. These frameworks are then leveraged to analyze the history of Japanese martial arts.

There have been others who have leveraged Elias's sociology to study Japanese civilizing patterns before García. In her book *The Taming of the Samurai*, Eiko Ikegami focuses on the ruling structure of the samurai who controlled Japan for 700 years, up until just before the country's modernization [Ikegami 1995]. This is where she discovered the path of the civilizing of Japan. However, Ikegami explicitly states in her study that she does not deal with the topic of Japanese martial arts, which are popular in the West. Therefore, García's research complements and expands that of Ikegami. As such, the book might be considered a significant contribution to Japanese Studies in this context.

From my own perspective, I am not an expert in the field of sociology (I have a background in social history and anthropology), but I am someone who specializes in the study of Japanese martial arts. For this reason, I cannot critique García's use of the theories of Elias and Wouters from a position of expertise. So, what follows is a summary of the book, with details of how it is constructed, concluding with some pronouncements on its significance as well as the challenges it poses.

2 BOOK SUMMARY

The book is divided into three parts excluding the introduction and the epilogue. They are as follows: Part I covers ancient and medieval Japan, Part II details the early modern period, and Part III looks at modern times. Part I explains the process of the development of martial 'ryu' (schools or styles). Upon hearing this term, one might typically think of *jujutsu* or *kenjutsu* (the latter being Japanese swordsmanship). Or one might think of such martial arts as judo or aikido; and in the modern day, perhaps even Brazilian jiu-jitsu (BJJ). *Kenjutsu* often connotes the image of samurai via association with, for example, the book *The Five Rings* by Miyamoto Musashi, which together can act as an easy proxy encapsulating 'Japanese martial arts' as such. In reality these martial arts emerged in the era covered by Part II. The period covered by Part I primarily requires dealing with archery, horsemanship, and sumo. In ancient times, none of these pursuits rose to the level of a coherent martial ryu. However, it is a matter of historical fact that from the 9th century sumo and horse-mounted archery began to be incorporated into military training and court rituals.

The Japanese Middle Ages began at the end of the 12th century, with the country transitioning from an aristocratic to a samurai-led society. Subsequently, between the 14th and 15th centuries, the martial ryu that would become the forbearer of the various schools was established. The schools of horsemanship and archery were also formed at this time.

García focuses on how the genetic make-up of these martial arts was influenced by both Esoteric Buddhism and the Shinto faith. In the Japan of ancient times and the Middle Ages, Buddhist monks and Shinto priests doubled up as both learned academics and technocrats, making them indispensable to any discussion of the formalizing-civilizing of martial arts. Religions such as Esoteric Buddhism, which reflect the spirituality of the individual and work toward achieving a higher spiritual plain, greatly influenced the development of martial arts system. *Shukendo* (a form of Shinto) is still practiced in some places, but the methods involved in this practice have been incorporated into martial arts. In other words, the system of self-restraint that involves controlling one's emotions and self-objectivization was integrated into the violent martial arts system. Here we are offered a glimpse into one part of the Japanese civilizing process.

However, the martial ryu formed from the 14th to 15th centuries is not limited solely to the arts of archery and horsemanship. It has been noted that in the 14th century, a school of swordsmanship known as *nen-ryu* existed. From the 16th century onwards the number of martial ryu surrounding swordsmanship and spears increased. Many of the founders of such schools were mid- and lower-ranked samurai who fought on the front lines. This trend was reflected in the fighting style of the time.

Part II corresponds roughly to the time of the Tokugawa Shogunate. During this period, the political system was stable, and the transformation of samurai from warriors into bureaucrats continued. The aim of martial arts in this period was shifting from practical usage on the battlefield to refinement of an art. Simultaneously, the number of teachers and dojos where samurai could learn martial arts as a refined discipline increased. In martial arts dojos, skills were practiced in pairs known as *kata*, but matches with other martial ryu were forbidden by dojo leaders. The reason for this was that any action that might instigate conflict was banned by the Tokugawa Shogunate. Moreover, shoguns and *daimyo* feared that martial ryu could form organizations that crossed feudal domains. This would create the potential for organizations of martial ryu to morph into rebel organizations against the shogunate.

A culture emerged in which martial ryu masters would transmit both their secrets and the right to pass on licenses to students. Other ryu involved in tea ceremonies and flower arrangement were not classed as violent organizations; therefore, it was possible, using these ryu, to create pyramid-style organizations that traversed feudal domains, in which the transfer of secrets and the ability to confer licenses by elders could be isolated and independent. However, regardless of the degree of formalizing in martial arts, the danger to the Tokugawa Shogunate did not dissipate. Ultimately, a large number of independent martial ryu developed in every region throughout Japan.

Part III discusses the modernization of martial arts. First, in the Meiji Period, martial arts were reconstituted as a national culture that formed a shared national consciousness. The nucleus of this transformation was the Kodokan Judo Institute and the Dai Nippon Butoku Kai. From the Taisho era, while martial arts were established as a form of national culture, new styles in addition to kendo, judo and archery – such as karate and aikido – emerged. Japan was involved in the Second World War, and through this process, the links between martial arts and the military were strengthened, with a corresponding turn toward the framework of decivilizing-formalizing.

García convincingly demonstrates that through adopting the concept of formalizing, it is possible to analyze in more detail the nature of the decivilizing of Japan's martial arts in the Showa Period. Since the Second World War, unarmed martial arts (known as *kakugi*) have remained present in the Japanese school system, and new forms, such as mixed martial arts (MMA), have spread through Japanese society.

3 THE SIGNIFICANCE AND CHALLENGES OF THE BOOK

This book is one of the first to use Elias's sociology so centrally in considering the social history of Japanese martial arts, and is perhaps unique in its vast historical scope and sweep.¹ Many experts – particularly in the Japanese academy – who research the history of Japanese martial arts focus primarily on the Tokugawa Shogunate and the Meiji Period. Perhaps because of these two factors, this kind of research rarely appears in the Japanese context. Were such an expansive piece of research to be attempted by a single person in Japan, they would be expected to have an almost impossibly high level of knowledge. Indeed, perhaps García felt able to tackle such a broad historical field precisely because he is neither Japanese nor working in Japan.

By contrast to García, most Japanese researchers tend to take only one period and martial ryu as their focus, and they tend to analyze their chosen topics within martial arts history only from a narrow perspective. However, García offers a method with which to view the history of Japanese martial arts while employing a macro perspective. Thus, another way in which this book is important relates to its great contribution in the form of a strong theoretical point of view, which could be adopted or explored by other scholars of martial arts history in Japan.

While this was not touched on in the earlier summary, the book devotes a great deal of space to explaining Japanese history. However, in his introduction, García states that he cannot speak Japanese and that therefore, one limitation of the research is that he was unable to examine documents written in Japanese. I also think this

1 There have been studies of Japanese martial arts using Elias's sociology before this book. For example, Alexander Bennett also referred to Elias's theory of civilization in his book but does not apply it to the ancient period or the Japanese Middle Ages. See Bennett [2015].

is a difficult point of this book. For example, subjects such as the emergence of samurai warriors are themes about which a consensus has yet to be reached by researchers of Japanese history in Japan itself. However, I was surprised that despite not being able to consult documents or research papers written in Japanese, García was able to compose a history of Japan from ancient times to the modern day. This clarifies the extent to which there has been a great deal of research compiled outside of Japan regarding Japanese history. More importantly, this includes research that leverages topics not yet fully pursued in Japan, such as research into *tengu* (a creature found in Japanese folklore) and research into experts of violence in modern Japan. It is telling, in this regard, that a translation of the originally English language book *Ruffians, Yakuza, Nationalists: The Violent Politics of Modern Japan, 1860–1960* has recently been published in Japan [Maruko Siniawer 2008, 2020]. In fact, it appears that research into these ‘Japanese’ topics is more advanced abroad than it is in Japan.

Overall, it was impressive that it was possible for García to have a detailed discussion Japanese martial arts history using only English language sources. The book deals with many historical facts that are not even known in Japan outside of highly specialized research circles. These topics include how martial arts were influenced by Esoteric Buddhism and Shinto when martial ryus were emerging; the unique aspects of the rights to transmit martial arts during the period of the Tokugawa Shogunate; and how not only samurai, but also farmers practiced martial arts.

However, I have doubts as to whether Elias’s sociology was sufficiently leveraged in this work. While the book is interesting as a comprehensive history of Japanese martial arts, it was less helpful in conveying the specifics of how the people’s discomfort with violent behavior expanded in certain periods and what moves were made to suppress this. Moreover, in his epilogue, García establishes four quadrants – using the concepts of civilizing, decivilizing, formalizing, and deformalizing – positioning different forms of martial arts as a mirror reflecting the varying conditions of each era. Yet one must conclude that much more research based on historical facts is necessary before we would be able to establish whether the positioning of these four quadrants is correct.

As such, the strength of the book lies in its ‘figuration’, in seeing society as an interdependent network; however, perhaps greater consideration could have been given to the forms through which individual people within the interdependent network suppress and express their emotions. At the end of Part I, García touches on how the systems of practice of Esoteric Buddhism were adapted into martial arts. However, in my opinion it may have been easier to connect the unique features of martial arts to the arguments of Elias and Wouters by considering the Japanese patterns of how the individual releases and expresses emotion centered on the idea of *Shinpo*, which itself relates to the objectification and control of the mind.

For example, allow me to consider how the practice of kata in the Tokugawa Period was tied to Shinpo. In the martial ryu of the Tokugawa Period, it was generally believed that one’s skills improved in step with one’s state of mind. For this reason, it was necessary for practitioners to reflect on their own state of mind and leverage the results of this reflection in the next lesson. The introduction of Shinpo into martial ryu allowed practitioners to control their inner selves. It is important to note that in a practice such as kata in which aesthetics are highly valued, it is only the master’s viewpoint that decides what kind of performance is good. In other words, the master is the only person in each martial ryu who can evaluate the performance of the kata. This means that in the practice of kata in the martial ryu of the Tokugawa Period, it was demanded that the individual accept the opinion of their master in evaluating their method of reflecting on their own state of mind. This involved a process of accepting the feudal social relationships of the master, also acting as a method of training self-restraint on the part of samurai at the beginning of the Tokugawa Period.

In reality, the Shinpo incorporated into every martial ryu often included the skills-related teachings of selflessness and freedom from obstructive thoughts, as well as Confucian teachings surrounding social relationships. This tendency became more pronounced with the passage of time. However, the moment one had mastered all kata and reached selflessness and freedom from obstructive thoughts, they were allowed to become independent of their master. Some of these individuals would go on to establish martial ryu themselves. Those who gained their independence were allowed to express their own sense of violence through a kata as they wished.

In addition, those who gained their independence were most often vassals and ordinary people, and while they were unable to transcend their ordinary social milieu, they stood tallest in the field of their practice. Even if they were a farmer, they could rise to become the master of a samurai. Is this not a Japanese way of controlling and expressing emotion? In other words, martial ryu acted as a type of pressure release valve to maintain the Tokugawa Shogunate, or to frame it in terms of Elias's work, they became a sort of enclave.

The experience of reading this book was deeply significant to me as a scholar, as it has led to the aforementioned epiphanies. I expect that the book will continue to be the kind of work that is valued by a wide and diverse audience in the future.

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