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On behalf of the Annual Review of Education, Communication and Language Sciences team, we would like to welcome you to volume 18.2. We are very fortunate to present six articles for this volume as follows:

- ❖ **Farida Alhahmmed** considers heritage language and family language policies. This paper looks at the value such constructs bring and how they are translated within the family dynamic.
- ❖ **Andrew Botham** highlights the role of emotion in ‘moral decision-making’.
- ❖ **Eseul Na** considers the covid-19 pandemic and government strategies put in place to tackle the crisis. Looking particularly at the competence of the UK and South Korean government communication strategies.
- ❖ **Lily Ferris** examines race and culture through animation and science fiction. Using examples of science fiction animation, Ferris deconstructs themes of race and the ‘us/other binary’.
- ❖ **Dr Helen Owen-Hughes & Dr Richard Parker** illustrate how children and in particular refugee and asylum-seeking children’s needs are conceptualised. The authors discuss the potential impact this overlapping situation has regarding the inclusion of refugee and asylum-seeking children within educational systems.
- ❖ **Kleopatra Sideridou** uses multimodal discourse to derive meaning. Using an automobile advertisement as an example, Sideridou considers the various features of the advertisement to explore its effectiveness and derive its meaning.

Altogether the articles in this issue bring together different ways of addressing and/or considering some of the core concerns within Education, Communication and Language Sciences. This includes reflection on some of the more complex and moral issues that are salient in the current climate of educational discourse.

Thank you to our editorial team, Nada Bin Ghali & Cody Zhang whose hard work has been indispensable. Thank you also to all the contributing authors of volume 18.2.

We hope that you enjoy this volume.

Nadia B Ahmed (Senior Student Editor) and Peter Sercombe (Editor in Chief)



Family Language Policy and Heritage Language Maintenance among Libyan Migrant Families in the UK

Farida Alhjahmmed

Abstract

Addressing the scarcity of research in family language policies (FLPs) among migrant families in general and among Arabic migrant families in particular, this study aimed to investigate the FLPs of six Libyan migrant families in the United Kingdom. It also sought to understand the value that mothers construct regarding the role of their heritage language (HL) in their children's lives. The study used Spolsky's (2004, 2009) theoretical model of language policy, which encapsulates three interrelated components: language ideologies, practices, and management. A qualitative interpretive approach was adopted, using in-depth semi-structured interviews for data collection. The findings revealed that mothers greatly value their Arabic HL, holding strong positive beliefs about it and very much wishing to transmit it to their children. The religious status of Arabic, the sense of cultural Islamic and ethnic identity, and a high degree of attachment to their homeland were the most significant reasons behind the mothers' strong positive beliefs about their HL, which in turn affected their language practices and management. Consequently, more pressure and extra responsibility are on them.

Keywords: Multilingualism, Heritage Language (HL), Family Language Policy (FLP), Language Ideologies, Reflexivity.

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Introduction

The number of families migrating to the United Kingdom (UK) is increasing. The 2011 census showed that 7.7% of the national population spoke a language other than English as the first language (Office of National Statistics, 2013). A recent report by the Office of National Statistics (2018) also shows that 34% of children born in Britain have at least one parent from a different country. Moreover, approximately 20% of primary school children are classified as speakers of English as a second language. This provides evidence that the UK is a linguistically rich country; notwithstanding, it has no comprehensive national language policy to preserve its increasing linguistic diversity, and in the absence of institutional support for heritage language (HL) education, the family has been the domain for the transmission and maintenance of children's HL (King, Fogle, & Logan-Terry, 2008; Schwartz, 2010). Unless migrant parents endeavour to preserve their children's HL and make deliberate efforts, children will lose their HL and replace it with the dominant language (Fillmore, 1991). The supposed benefits of additive bilingualism (Lambert, 1974), i.e., adding a second language and culture without replacing or displacing the first, cannot be taken for granted, especially among children in migrant families. In addition, the language policies in the UK, aimed at promoting the learning of English as a tool to optimize integration in British society, largely relegate HL to the home domain. Despite there being a plethora of research on how

multilingual migrant families in Britain integrate in society (e.g., Phillips, 2013), as well as how multilingual migrant children succeed in schools (e.g., Davies, 2012; Doughty, 2012), little work has been done to understand what is going on linguistically within such families. The experiences of migrant families in dealing with multilingualism are worth exploration, not just to understand how parents maintain their children's HL, but also how migrant families perceive and understand the value of their HL and construct their identities.

Therefore, this study aimed to understand the language experiences of six Libyan migrant families residing in Newcastle. It employed Spolsky's (2004, 2009) theoretical model of FLP, which consists of three interrelated components: language ideologies, practices, and management. The study contributes to a better understanding of the language experiences and practices of Libyan migrant families through the lens of parents' perceptions.

This study focuses on mothers only rather than fathers for multiple reasons, but primarily because of the significant role that mothers play in transmitting and maintaining the HL to their offspring. Winter and Pauwels (2005) argue that mothers play an essential role in maintaining the HL through the generations, as well as in setting up their FLPs (Tannenbaum, 2012). In a similar vein, Piller and Pavlenko (2004) claim that mothers are regarded as the "guardians of the minority language" (p. 496). More importantly, the focus on mothers is a

reflexive consideration in representation, placing women's voices at the core of this study as a means of shedding light on their experiences, thoughts, and feelings (Oakley, 2016). In addition, mothers are chosen rather than fathers for practical reasons, such as accessibility and being comfortable in conducting the research. As both the participants and I, are from an Islamic society (Libya), it is more comfortable to interview and/or be interviewed by women.

Considering the crucial role that immigrant mothers' involvement plays in their children's HL maintenance, more research is needed to explore how and why first-generation immigrant mothers promote HL learning in their children.

Literature review

Multilingualism

In this study, multilingualism refers to "the ability of societies, institutions, groups and individuals to engage, on a regular basis, with more than one language in their day-to-day lives" (European Commission, 2007, p. 6). This definition is widely used in multilingual studies and is most applicable here as it takes a social approach, considering sociolinguistic issues such as the use of more than one language within social contexts (societies and institutions) and the frequency of use on a regular basis in daily life, regardless of the proficiency level of the speakers. This is in line with the position adopted in this study, consistent with that of Skutnabb-

Kangas and McCarty (2008), who argue that perfection in mastering and attaining a balance between two or more languages is not necessary to be termed bilingual or multilingual.

Heritage languages (HLs) and heritage language (HL) speakers

The term HL is defined in this study as "a language spoken at home or otherwise readily available to young children, and crucially this language is not a dominant language of the larger (national) society" (Rothman, 2009, p. 165). This definition encompasses the social context of the HL (home), the potential learners (children), and the status of the language in a society (not dominant), which in this study was Arabic.

Speakers of HLs can be defined as those who are "raised in a home where a non-English language is spoken, [who] speak or at least understand the language, and [are] to some degree bilingual in that language and in English" (Valdés, 2001, p. 38). According to Canagarajah (2012), proficiency in the HL will be weaker than in the majority language. However, Zhang (2016) provides a more nuanced perspective and considers that HL learners' written, and oral skills will vary depending on their learning experiences in the home or other social context. In a different vein, Kondo-Kondo-Brown (2003) argues that HL learners should be defined by focusing on identity orientation rather than linguistic proficiency. In line with Kondo-Brown's argument, this study focused on HL values by exploring

Libyan mothers' beliefs and practices of their HL within the home context, rather than focusing on HL proficiency.

Arabic heritage language (HL) maintenance in the UK

To the best of my knowledge, there have been three studies of HL maintenance among different Arab families in the UK. Gomaa (2011) explored how Egyptian parents in Durham supported their children's HL through transmission and maintenance. Similarly, [Othman \(2006\)](#) investigated parents' efforts to preserve their children's use of Arabic among Jordanian, Egyptian, Tunisian and Libyan families in Manchester. [Jamai \(2008\)](#) explored HL maintenance in Moroccan families in different cities in the UK. All these studies revealed similar findings in terms of parents' efforts to transmit and maintain the HL, including enrolling their children in HL schools, using Arabic at home, and participating in community events.

While these studies investigated explicit efforts to maintain the HL, none of them examined the beliefs of the families in detail. Moreover, although Arabic-speaking communities share many similar characteristics in terms of language, religion and culture, each community is distinct from the others in some way and the Libyan community has its own variety of Arabic and culture. Furthermore, none of these studies employed FLP as a theoretical model addressing the three interrelated components of language ideologies, practices, and language

management. Considering the complexity and distinctiveness of each community, as well as of each family within the same community, this study aimed to respond to Curdt-Christiansen's (2016) call for more research on language ideologies among diverse multilingual families in the home context "to illuminate the specific processes or mechanisms whereby [linguistic and non-linguistic] forces come into play and relate to each other" (p. 697).

Family language policy (FLP)

Family language policy (FLP) is an interdisciplinary field of inquiry that employs theoretical frameworks such as language policy, language socialization, and child language acquisition (Fogle, 2012; Ren & Hu, 2013; Smith-Christmas, 2014). FLP provides a conceptual framework for exploring language changes in family settings in a particular society. Moreover, it considers the family as "a key prerequisite for maintaining and preserving languages" (Schwartz & Verschik, 2013, p. 1), which was at the core of this study. Based on the language policy model, King et al. (2008, p. 907) state that FLP is "an integrated overview of research on how languages are managed, learned and negotiated within families". Hence, the aim of FLP research is to understand language ideologies (i.e., people's beliefs about languages), language practices (what people do with languages) and language management (what efforts people make to maintain languages) (Spolsky, 2004, 2009, 2012). This study was

situated within the field of FLP because it aimed to understand the language beliefs and practices of Libyan migrant families through the lens of mothers, and to understand the value of the HL in their children's lives. Although Spolsky's (2004, 2009) model has been criticised by Lomeu Gomes (2018) as it is not sufficient to answer existing types of inquiries concerning migrant families. It is adopted in this study as it helps to focus on what is most important and relevant to understanding of the phenomenon.

Language ideologies are a central component of FLPs, influencing both language practices and management within the family context. The significant role of the family in transmitting the HL within migrant families, and more specifically parents' language ideologies, has been emphasized by several studies on FLP (King & Lanza, 2017; Lanza & Curdt-Christiansen, 2018) and language maintenance and shift (Li & Zhu, 2019). Curdt-Christiansen (2009) considers language ideologies to be "the driving force" that shapes the FLP. At a macro level, language ideologies are social constructs that mirror a specific language's historical, social, and political roles (Curdt-Christiansen, 2014; Kroskrity, 2010). At a micro level, language ideologies refer to the evaluative conceptions of language speakers of the value, status, and social utility of a language in a particular society (Curdt-Christiansen, 2009). Language ideologies and practices are intertwined (King, 2000). At times they are in harmony (Kopeliovich, 2010), but sometimes they are in contradiction to each other

(Curdt-Christiansen, 2016). What is important to our understanding is how these ideologies are formed and accordingly how FLP is acted upon.

Spolsky (2009) makes a distinction between the macro-level and micro-level factors that play a role in the formation of parent's beliefs about language(s). The former concern the way in which broader national language policies and language education policies are contested and negotiated by parents in migrant families, as well as the ways in which they form FLP practices (Lane, 2010; Seloni & Sarfati, 2013). The latter are narrower and include factors such as the migration experiences of the parents, experiences of language learning, aspirations, and the social values of the language, the close network of families and friends, and the socio-economic position of the family (Curdt-Christiansen, 2016; King & Fogle, 2006; Li Wei, 1994; Revis, 2016). It has been claimed by Curdt-Christiansen (2009) that both macro- and micro-level factors exert a significant influence in shaping FLPs.

In terms of *language practices*, it refers to the use of language in daily interactions between parents and their children. Shohamy and Spolsky (2006) argues that these practices can be explicit, i.e., come from deliberate decisions, or can be implicit, i.e., unconsciously manifested in de facto practices. An example of these practices, what is so called translanguaging (TL). Several definitions of TL have been proposed. It is defined here as "multiple discursive practices in which

multilinguals engage in order to make sense of their bilingual worlds” (Garcia, 2009, p. 45). This definition goes beyond the pedagogical perspective and sheds the lights on multilinguals’ everyday practices which are the focus of this study. Indeed, Blackledge and Creese (2017a, p. 34) contend that TL “is commonplace and everyday”. TL as an everyday practice covers interactional actions and their criticality in domains such as families.

Unlike code switching (CS), which focuses on alternation between two languages and codes and presumes that they are distinct, TL goes further, considering the language user, not just the language itself. According to Garcia (2009), the focus of TL is on the flexibility of multilingual practice, which is distinct from the focus of CS.

Otheguy et al. (2015) also note that TL and CS are different from each other and point out that TL views languages as social and not linguistic objects. The focus is on the speakers (e.g., identity) rather than on speech (e.g., grammar).

In contrast, *language management* refers to explicit strategies and efforts that parents make to modify children's linguistic behaviours, which in turn, are greatly influenced by their language ideologies (Spolsky, 2007). Examples of these management strategies are watching HL channels, enrolling children in complementary schools to develop their HL skills. Also, selecting their peers, visiting HL speakers within their community, and visiting their homeland to expand HL exposure.

Research questions

- 1) What are Libyan mothers’ practices and what efforts do they make regarding their children’s heritage language (HL) acquisition and maintenance?
- 2) How do Libyan mothers in the UK understand the value of their heritage language (HL) in their children’s lives?

Methods

Findings

This section presents the findings of the interview data concerning participants’ HL beliefs, practices, and the parents’ efforts to transmit the HL to their children. These findings are discussed in relation to Spolsky’s (2004, 2009) model of language policy.

Language beliefs

All the mothers in this study held strong positive beliefs concerning the value of their HL. They regarded it as their children’s mother tongue and considering it essential to transmit the HL to their children. They also expressed a sense of responsibility to maintain the HL and pass it to their children. The chief reason for mothers’ strong desire to maintain the HL was that Arabic is the language of the Holy Quran and Islamic religion. Other reasons included preserving their children’s Arabic identity and culture. This is explained in the following examples

Sana:

اللغة العربية مهمة جداً في حياتنا، خاصةً لأننا في الأصل عرب وهذا يعني أنها لغتنا الأم، وهي لغة القرآن، واللغة التي يستخدمها أطفالنا للصلاة

Arabic language is very important in our lives, especially because we are originally Arab which means it's our mother tongue, and it's the language of the Quran and the language my children use to pray....my role as a mother is trying to encourage them to speak Arabic language.

Tahani:

يجب أن يتعلموها لأنهم ينتمون إليها، ولأنها وسيلتهم في تعلم الثقافة العربية، ووسيلهم أيضاً لتعلم الدين الإسلامي....أنا بدوري كأُم أحاول أن أشجع أولادي أن يتحدثوا اللغة العربية .

They must learn it because they belong to it, and because it's their tool to learn Arabic culture, and their tool also to learn about Islamic religion.

Mona:

يعني لولا مجهود الأمهات أشعر أن أبنائنا العرب أنه هـما رح يفقدوها يوماً ما لو ما سعيـنا في اللغة وأسسناهم صح

So, if not for mothers' efforts, I feel that our Arab children would lose it one day if we would not make efforts in the language and establish them correctly.

Hajer:

سيكون هناك ضعف كبير إن قصرنا في حقهم في التحدث بها معهم

There will be a great weakness if we fall short in their rights to use it with them.

These results above are in line with Wong-Fillmore's (1991), Fishman's (2001), and Cavallaro's (2005) claim, who argue that multilingual migrant parents use the HL as a vehicle to transmit their cultural identity to their offspring. Additionally, Gomaa (2011) found that Egyptian Arabic families in the UK view maintaining Arabic as part of maintaining their cultural and religious identity. The results also echo what Iranian parents reported in Gharibi and Seals (2019) study of Iranian families in New Zealand. Turkish parents in the Netherlands in Bezcioglu-Goktolga and Yagmur's (2018) study also mentioned that preserving the Turkish identity was the most reason for using the HL in the home. However, Pillai, Soh, and Kajita, (2014) study on

Seals (2013) argues that the ability to communicate with relatives is one of the key reasons for HL maintenance. connections with family in the home country was a strong motivator for preserving the HL.

Language practices

All the mothers in this study described that they use Libyan Arabic at home in their daily interactions with their family members. However, there were variations in terms of the amount of the languages spoken between and within families. For example, while Hajer and Mona adopted a strict language policy, using exclusively the Libyan Arabic when they interacted with their children, Ghada, Sana, Tahani, and Fatima adopted more flexible policies, stating that they mainly used Libyan Arabic and sometimes English. Despite the variation in mothers' use of Arabic with their children, all reported that

FLP among five Portuguese Eurasians in the Portuguese Settlement in Malacca found that not all parents establish a clear link between the transmission of HL and culture.

In addition to shaping ethnic identity, Sana mentioned that she preferred to speak Arabic with her children so they could communicate with family back home and stay connected with their relatives. She stated this by posing a rhetorical question to stress the importance of using Arabic to remain connected with relatives back in the home country:

Sana:

فكيف لأطفالنا أن يتواصلوا مع أقاربنا بدون اللغة العربية؟ مهمة جداً.

How can our children communicate with our relatives without the Arabic language? very important!

Similarly, Bennett (1990) found that maintaining

their children spoke mostly English with each other.

Hajer:

أنا حريصة على أن أتحدث اللغة العربية معهم.

I am persistent to speak Arabic with them.

Also, Mona, who adopted an Arabic-only policy, reported that her younger daughter (7 years old) used English more than her siblings. Mona pretended that she did not understand when her daughter spoke English and asked her to repeat in Arabic, although her daughter knew this was a trick to encourage her to use Arabic. This is called a minimal grasp strategy (Lanza, 2004), which has been proven to promote HL use in children. However, it can be stressful; indeed, Mona reported that sometimes this strategy

made her daughter stressed and weepy. This finding is not very encouraging.

Tahani:

مع ماجد حاولنا أن نتحدث بالعربية وأقحمناه بتعلم اللغة العربية الفصحى ولكن كان ذلك يعني وصل إلى درجة أنه مؤلم لأن لديه توحد.

With Majed, we tried to speak Arabic, and we brought him into learning classical Arabic, but that was so ... I mean, it has reached the point that it is painful for him because he has autism.

Mona:

يعني أنا فعلاً بنتي نور متعبتي لأنه هي أكثر وحدة تتكلم إنجليزي ، فانا انحي نقولها عاودي بالعربي و أصغر دائماً أني لا أفهم الإنجليزية وأحياناً تقعد تنكي مسكينة.

I mean, really, my daughter Noor, because she is the most one who speaks English, so I tell her repeat in Arabic and always pretend that I do not understand English, and tell her to repeat in Arabic, and sometimes she starts to cry.

Mona also added that occasionally her elder children inserted English words when they struggled to find an equivalent in Arabic. On such occasions, she would intervene and tell them about the word in Arabic and ask them to repeat it directly so they would memorize it. She found this strategy helpful:

Mona:

حياناً مثلاً فيه كلمة بالإنجليزي يقولولي ماما شن هي. فانا اترجمها بالعربي وأطلب منهم يعيدوها فيستفيدو من هذا.

Sometimes, for example, there is a word in English, and they ask me Mama what is this word in Arabic, so I translate it in Arabic, and I ask them to repeat, and they benefit from this.

Tahani's case was somewhat exceptional. She and her husband decided to use only English with her autistic child, who was 12 years old. Their decision was taken after many attempts to use Arabic with him, but he found it difficult and even painful to use two languages:

Tahani also stated that during mealtimes, for example, she and her husband deliberately used English so her autistic son would feel included.

Similarly, Sana reported her family's use of an English-only policy with her 6-year-old child was based on him having a language impairment.

In terms of TL and CS practices, Ghada considered CS a natural phenomenon, and that she allowed mixing between languages in here children's interactions. Tahani went further by saying that mixing languages indicates human intelligence. Sana also reported that she alternated between English and Arabic so to facilitate communication. According to De Houwer (2015), CS ease family communication by minimising language barriers and reducing tensions.

Nonetheless, Hajer reported that she employed an Arabic-only policy; she allows her 3 years child to mix languages. She considers this practice as a problem-solving and even an achievement.

For me, mixing languages is not a problem, in contrast, it's a solution in which my child trying to help himself to find the needed word, and this is an achievement.

بالنسبة لي لا يمثل خلط اللغات مشكلة ، بالعكس بل هو حل يحاول فيه ابني أن يساعد نفسه في العثور على الكلمة المطلوبة وهذا إنجاز في حد ذاته.

This finding corroborates the ideas of Vu et al. (2010), who suggested that even at a very early age children can use their two languages strategically to accomplish linguistic and non-linguistic goals.

Language management

As discussed earlier, language management refers to any efforts parents make to manage children's language practices HL development and maintenance. Parents' encouragement to use the HL is included in this component. Besides the deliberate use of HL, all mothers reported that they constantly encourage their children to use Arabic at home. It is through explicit verbal encouragement. For example, Ghada stated:

Ghada:

أشعر أن المدرسة الليبية مهمة جدا لتعزيز اللغة العربية ولتطوير مهارة القراءة الكتابة ... وأنا أيضا لديها هدف الليبية. ثاني وهو: الاجتماع مع الأطفال الليبيين لتعزيز اللهجة الليبية و لتعزيز العادات والتقاليد الليبية.
I feel that the Libyan school is very important for teaching and developing the skill of reading, writing, and listening ... I also have a second goal, which is: meeting with Libyan children to promote the Libyan dialect and Libyan traditions and customs.

ولهم بأن يتحدثوا اللغة العربية قدر الإمكان.

I tell them to speak Arabic as much as possible.

Also, all the mothers reported that they undertook various activities regularly with their children to develop the HL. These activities include watching Arabic TV channels, reading Arabic stories, contacting extended families, cooking traditional food, celebrating Islamic and national events, and sending their children to Libyan schools.

Sana:

هد القنوات العربية والرسوم المتحركة باللغة العربية

We watch Arabic channels and cartoons in Arabic.

Ghada:

نا نقرأ قصص بالعربي وأحيانا نقرأ كتب من المنهج الليبي خاصة. لتطوير مهارة القراءة
Sometimes, we read stories in Arabic, and sometimes we read from the Libyan curriculum, to develop reading skills.

Sana, Hajer, and Mona also mentioned that they made use of the COVID-19 lockdown to do more activities at home with their children to develop Arabic. Sana noticed that her youngest child (5 years old) developed his Arabic skills during the lockdown:

Sana:

ة الكوفيد-19 حاولنا جدامع ابني الصغير أن يتكلم العربية فبدأ يتحدث اللغة العربية الحمد لله
خارج الحروف لا يجيدها

During the COVID-19 period, we worked hard for my youngest child to and thank God! he started to speak Arabic with us, but there are some finds difficult to pronounce.

Moreover, the mothers emphasized

the importance of their children attending Libyan complementary schools for their HL development, as well as maintaining the Libyan Arabic culture and identity.

These findings are consistent with those of Ganassin (2017), who found that community schools had a crucial role in the identity construction of Chinese migrant children. According to Li (2006), complementary schools are crucial spaces that develop migrant children's identities and sense of belonging.

Discussion and conclusion

The aim of this study was to understand FLPs in six Libyan families in the UK. It also aimed to understand the values that mothers construct regarding the role of their HL in their children's lives. The findings revealed that mothers greatly value their HL, holding strong positive beliefs about it and very much wishing to transmit it to their children. The significant reasons that influence Libyan mothers' language ideologies, practices, and management choices, are the religious status of the Arabic language, the sense of cultural Islamic and ethnic identity, and a high degree of attachment to their homeland. As Arabic is the language of Islam and

given that Libyan society is an Islamic conservative society, much pressure and responsibilities are on the Libyan migrant parents, in particular, mothers, in a western migrant context like the UK, where minority languages are not protected by strict language policy and not supported in mainstream education. The findings suggest that despite the mothers' hard work to transmit the HL to their children, their efforts are not acknowledged and appreciated.

Furthermore, two of the main findings are worth highlighting here. The first is that in the case of Mona, the strict language policy adopted with her children seemed to have a negative effect on her 6-year-old daughter's emotions, which in turn may affect her daughter's experience of a harmoniously multilingual environment. The second finding is that Tahani sometimes deliberately uses English with her children to help her 13-year-old autistic child feel included. These two distinct findings lay the groundwork for future research of the impact of immigrant parents' language strategies on children's emotional development. Also, this study calls for more research to investigate the FLPs of immigrant families with autistic children and those with language impairments to gain an in-depth understanding of their HL experiences and provide support for those families.

In terms of limitation, this study, like others, has a number of limitations. First, it is limited by the lack of observation of Libyan mothers' actual language practices or recordings of mothers' interactions with their

children within the home context, both of which would provide useful evidence. Thus, the findings are limited to self-report data. Second, this study did not include children, whose agency in FLP has been demonstrated in recent research (i.e., Revis, 2019). Their views and agency in daily interactions could provide valuable information on the dynamic nature of FLPs. Finally, the findings in this study were drawn from mothers only and seeking fathers' and children's perspectives would add to our understanding of FLP.

Finally, a key implication of this study is that it reconceptualizes migrant mothers as "cosmopolitan intellectuals" (Campano and Ghiso, 2011, p. 164) who can develop their children's linguistic and cultural understanding by actively utilizing their transnational and multilingual knowledge. However, as Brown (2011, p. 35) suggests, "home cannot be considered as a shelter where HL automatically flourishes". The value of the HL should be mutually recognized by parents, policymakers, and educators in mainstream schools to provide a conducive linguistic and education environment to best support multilingual children in a migrant context and ensure a successful HL learning experience.

Notes on contributor

Farida Alhjahmmed obtained her master's degree from Northumbria University in TESOL. She is currently a Ph.D. candidate at Newcastle University, where she furthers her research on Multilingualism. Her paper is entitled, Family Language Policy and Heritage Language Maintenance among Libyan Migrant Families in the UK. This paper presents her summer project, which was a pilot study for her Ph.D. project. It was carried out, in 2020, under the lockdown restrictions; hence the data was collected online. Her research interest comes from her own experience in raising multilingual children in a migrant context. Farida also got inspired by continuous discussions and concerns that Libyan mothers raise during the community gatherings and social events about transmitting and maintaining the HL and culture to their offspring. Hence, her personal experience and ongoing discussions among mothers within her community; are primary reasons for her research interest. Shedding the light on those migrant mothers' language experiences and having their voices heard; are at the core of this study.

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Appendix 1: Semi-structured Interview questions

1. Background of participants

(Age/Level of Education/Time spent in the UK)

- How old are you?
- What is your level of education?
- How long have you been in the UK?
- How do you feel about your level of English?
- Do you speak other languages?
- What is your level of education?

2. Language practices

- What language/s do you speak with your husband at home?
- What language/s do you speak with your children at home? Why? Have you ever discussed this matter with your husband?
- During the family's gathering, what language do you use? Do you ask other relatives (grandparents, parents, in-law, uncles, aunties etc.) to speak a specific language with your children? Why? Language beliefs
- What is your opinion about the Arabic language? Do you have views about standard Arabic vs Libyan Arabic?
- Do you tell your children about your opinion about the Arabic language? Why?
- What is your point of view on English? Do you consider English important (e.g., for your children)?
- Is it crucial for you that your

children feel Libyan? What kind of things is crucial for you?

- What is your demand for language learning of your children? Do you request standard Arabic pronunciation from them? Do you correct them when they speak Arabic?
- Do you mix up different languages at home? How about your children? Can you give me an example of contexts?
- What is your opinion about this phenomenon?

3. Language management

- 11. Do you watch any Arabic or English TV programme with your children? Can you tell me more about this?
- 12. What kind of books do you buy for your children? Are they in English or Arabic? Can you tell me more about this (e.g., do you read with your children or do specific language activities?)
- 13. Do you take your children to the Libyan school? Why?
- 14. Do you do any other activity to support your children to speak/maintain their Arabic language?
- 15. If you are planning to stay in the UK, what language will you speak with your grandson/daughter in the future? Why?

Thank you for participating in my research.

ماهي اللغة / اللغات التي تتحدث بها مع أطفالك في المنزل؟
لماذا؟ هل ناقشتي هذا الأمر مع زوجك من قبل؟

أثناء الاجتماعات العائلية ما هي اللغات المستخدمة؟ هل
الأعمام / / / تطلين من الأقارب الآخرين مثلا الأجداد و
الخاللات وما إلى ذلك التحدث بلغة معينة مع أطفالك؟ لماذا؟

معتقدات اللغة

ما هو رأيك اتجاه اللغة العربية؟

هل تخبرين أطفالك عن رأيك في اللغة العربية؟ لماذا؟

ما هي وجهة نظرك حول اللغة الإنجليزية؟ هل تعتبر اللغة
الإنجليزية مهمة على سبيل المثال لأطفالك؟

هل من المهم بالنسبة لك أن يشعر أطفالك بأنهم لبييون؟ ما
نوع الأشياء المهمة بالنسبة لك مثال؟

ما هو مطلبك لتعلم اللغة العربية لأطفالك؟ هل تطلين منهم
النطق العربي الفصيح؟ هل تصحيحين لهم عندما يتحدثون
العربية؟

هل تخطين بين لغات مختلفة في المنزل؟ ماذا عن أطفالك؟
هل يمكنك أن تعطيني أمثلة على هذا؟ ما هو رأيك في هذه
الظاهرة؟

إدارة اللغة

هل تشاهدين أي برامج تلفزيونية عربية أو إنجليزية مع
أطفالك؟ هل يمكنك أن تخبرين المزيد عن هذا؟

أسئلة المقابلة

(العمر / المستوى التعليمي / مدة العيش في المملكة المتحدة)

كم عمرك؟

ما هو مستواك التعليمي؟

منذ متى وانت في المملكة المتحدة؟

ما هو شعورك حيال مستواك في اللغة الإنجليزية؟

هل تتحدث لغات أخرى؟

ممارسات اللغة

ماهي اللغة أو اللغات التي تتحدثين بها مع زوجك في المنزل؟

هل تقرأين مع أطفالك؟ ما نوع الكتب التي تقرأينها لأطفالك؟
هل هي باللغة الإنجليزية أم العربية؟ هل يمكنك أن تخبريني
المزيد عن هذا؟

هل تأخذين أطفالك إلى المدرسة الليلية؟ لماذا؟

هل تقومين بأي نشاط آخر لدعم أطفالك للتحدث / الحفاظ على
لغتهم العربية؟

إذا كنت تخطط للبقاء في المملكة المتحدة ، فما هي اللغة التي
ستتحدثين بها مع أحفادك في المستقبل؟ لماذا؟



Investigating Moral Reasoning: An Intervention to Explore the Role of Reason and Emotion in Moral Decision-making with a View to Informing Pedagogy

Andrew Botham

Abstract

The study was conducted as part of the Doctorate of Education programme at Newcastle University in 2018 and forms the first phase of a cycle within Design Based Research. The author conducts a small study to test a hypothesis based on literature in the field of moral decision-making with a view to refining the process within larger cycles of empirical investigation. Beginning with the two competing theories of moral decision-making (Greene, 2013; Haidt, 2012) the author develops an intervention to test one of the emotional and cognitive processes involved. The results indicate the author's hypothesis is incorrect. While the author initially believed that the 'head' could inform and over-ride the 'heart' in moral decision-making, the results and consequent discussion highlights the need for further research as the role of emotion seems more complex than originally anticipated.

Keywords: intuition, emotion, reason, rationalisation, affective heuristics

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Orienting Frameworks in Moral Psychology

The study of moral psychology is currently dominated by two theories that, in many ways are consistent with each other. But there are also critical differences between them. Jonathan Haidt's Social Intuitionist Model (SIM) (Fig. 1.) consists of a set of causal "links" connecting three types of psychological process: intuition,

persuasion" that ultimately modify that person's intuitions.

In contrast to this, Greene's dual-process model (Fig. 2.) builds on the work of Daniel Kahneman (2012) and posits 'two natural, ubiquitous, and qualitatively different modes of moral thinking that depend on dissociable, and in some cases competing, systems in the brain' (Paxton and Greene, 2010: 3). This model follows much

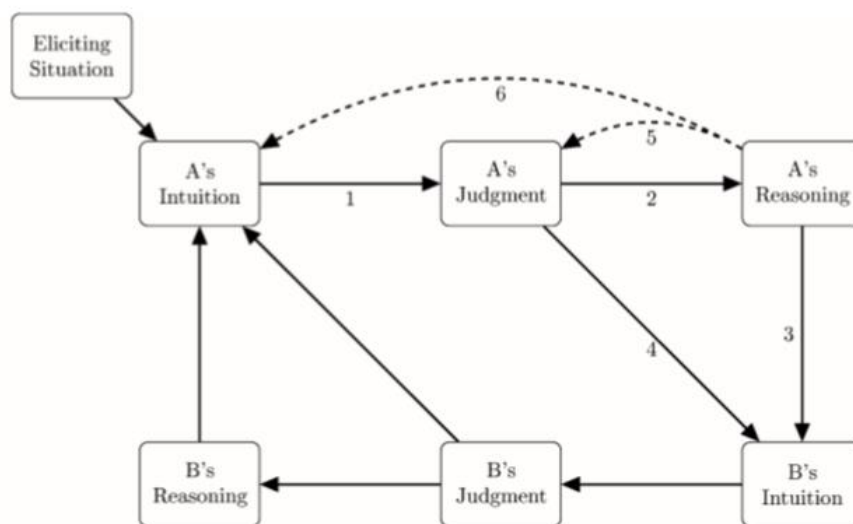


Fig. 1. Haidt's (2001) social intuitionist model (SIM) consists of six links describing causal connections among moral intuitions, moral judgments, and episodes of moral reasoning: (1) intuitive judgment, (2) post-hoc reasoning, (3) reasoned persuasion, (4) social persuasion, (5) reasoned judgment, and (6) private reflection. Dashed lines indicate links that are rarely used.

judgement and reasoning (Haidt, 2001). In this model, much of moral reasoning is "post-hoc reasoning" except where "private reflection" allows one's reasoning to influence one's judgement by modifying one's intuitions (Paxton and Greene, 2010: 2). Essentially, this model traces its lineage from Behaviourism as learning (i.e., changing one's moral intuitions in his model) is largely 'produced by stimulation and reinforcement' (Wu et al 2011: 266). Behavioural responses are conditioned through "social

more in the cognitivist tradition as 'learning involves developing effective ways of building schemata and processing information' (Jordan et al., 2008: 48). Both 'modes' involve the use of heuristics and information processing. However, it is interesting to note that the grounding for Greene's theory lies in evolutionary psychology

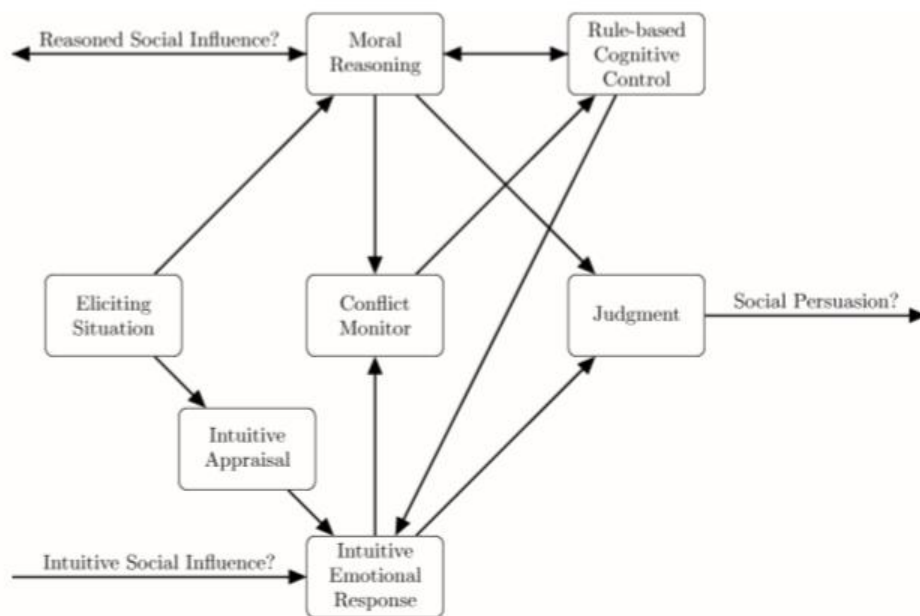


Fig. 2. According to Greene et al.'s (2001, 2004, 2008) dual-process model, moral judgments are driven by both intuitive emotional responses and controlled cognitive responses. This model differs from the SIM in two critical ways. First, it emphasizes the role of rule-based, controlled cognitive processes, especially the conscious application of utilitarian moral principles. Second, it allows that social influence may occur when people directly engage one another's capacities for moral reasoning, that is, the conscious evaluation of moral judgments/ behaviors for their consistency with moral principles and other moral commitments.

as he argues that 'morality is a set of psychological adaptations' to enable greater 'cooperation' (Greene, 2013: 23) but that through moral cognition, it can help us overcome our 'tribalistic tendencies' as our capacity to reason can over-ride our moral intuitions. While our emotional/intuitive responses often drive our moral decision-making in cases involving 'embodied cognition' (Greene, 2009), 'we all have the capacity, if not the will, to shift to manual (rational) mode (Greene, 2013: 345).

The critical difference between the two models can be summarized by reference to an analogy involving the "head" and the "heart" which both Haidt and Greene use to simplify their arguments (Greene, 2013; Haidt, 2012). Essentially Haidt argues that the "heart" drives the "head":

emotional/intuitive responses drive our moral decision-making and he employs studies from anthropology, the psychology of Behaviourism and psychological studies in political orientation to support his thesis. Greene, however, argues that the "head" can over-ride the "heart" in moral decision-making and employs arguments from philosophy, studies from behavioural psychology and recent discoveries from neuroscience to support his thesis. Despite their disagreement, there is considerable consensus on the psychological structures and processes involved in moral decision-making as they both agree that many instances of moral behavior are driven by emotional/intuitive responses and that this is a result of our evolutionary heritage as a species: these behavioral

responses emerged as an adaptation to ensure greater group cooperation (Greene, 2013; Haidt, 2012). However, where they fundamentally disagree is over the role that reason plays in moral decision-making today. Cognitivism claims that 'the memory system is an active, organized processor of information and that prior knowledge plays an important role in learning' (Wu et al 2011: 267). Greene argues that 'knowledge' is the crucial factor, and it is this that has the capability of allowing the "head" to inform and change the "heart".

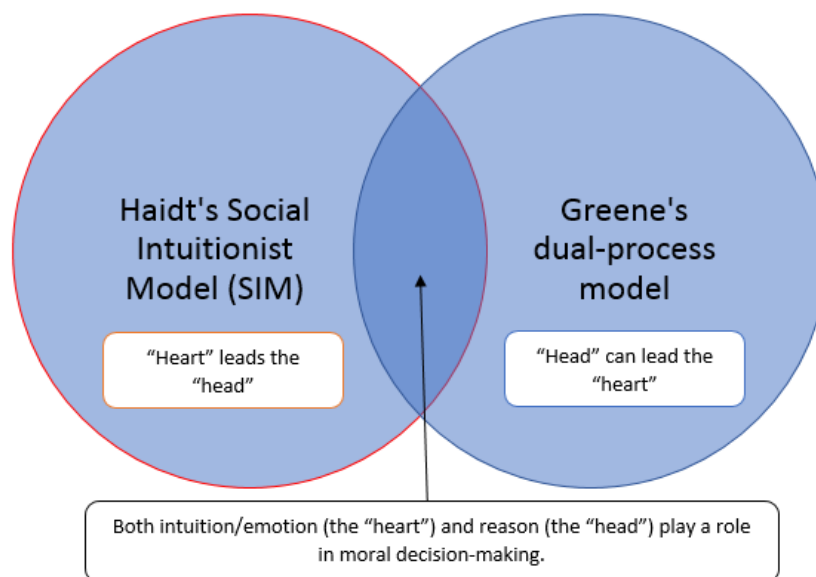


Fig.3

Planning a design experiment

In studying the literature on Moral Psychology, it is apparent that intuition/emotion often over-rides or unconsciously drives decisions made by cognition/reason in moral judgements (Greene, 2013; Haidt, 2012). However, for the purposes of this study, I will follow Greene in valuing and prioritizing the role of cognition/reason in moral judgements and attempt to teach a strategy for promoting this in moral decision-making.

The 'framework for action' for my study is based on previous research conducted by Greene (2013) and Haidt (2012). I will utilize 2 classical dilemmas in ethics that have recently been used by Greene and others to study the neuroscience of moral judgements and decision-making. As a result, I will be able to draw upon these findings to supplement my analysis. These dilemmas are variations of what is known in Ethics as the 'Trolley Problem' (Thompson, 1985). The variations developed by Greene (2013) are known as the 'Switch' and 'Bridge' dilemmas. Both involve a very similar ethical scenario and the results from many studies over the years have been fairly consistent. This will give me a good basis for analysing the impact of my intervention and to qualify and compare responses from the control group. Haidt has studied the psychological phenomenon of 'dumbfounding' (Haidt, 2012) and Haidt et al. (2000) argue that some dilemmas such as the classic 'trolley problem' and 'Heinz dilemma' are "reasoning" scenarios, whereas some

other scenarios are "intuition" scenarios. Consequently, judgements in "intuition" scenarios are more difficult to justify and can often lead to 'dumbfounding'. This has been confirmed by later studies (Haidt, 2012: 47). Greene et al (2009) argues that the 'bridge' dilemma involves 'embodied cognition' due to its relationship with the use of 'personal force' and, as such, it produces the emotional response of disgust (Greene, 2013) and this can lead to 'dumbfounding' (Haidt, 2012).

For the study, scenario 1 will be based on the 'Switch' dilemma and scenario 2 on the 'Bridge' dilemma. Appendices A and B contains the scripts used for the control and intervention groups that outline these scenarios. All participants will be told each scenario in a linear fashion and will have 30 seconds to think about each response and then 30 seconds to give an answer to the question, as well as justification. The timeframe is important as studies have shown that too much time to think (2 minutes or more) give cognition/reason more time to over-ride the initial intuition/emotion response, or to find rational justifications (known as 'rationalizations' (Greene, 2013)) for their initial intuition/emotion response, instead of simply being 'dumbfounded' (Haidt, 2012: 81). The intervention group will only have one slight change to the task: they will be asked to think of 3 questions they would like to ask about the scenario first, before making a decision. This 'innovation' builds upon the insights of Kahneman (2012) and Greene (2013). Kahneman identifies the importance of 'framing'

and ‘substituting questions’ as this can allow for cognition/reason (‘System 2’ in his model) to modify or over-ride the ‘affective heuristics’ of intuition/emotion (His ‘System 1’) (2012: 99). Instead of directly trying to answer the difficult moral question head on while they are affectively immersed (the scenarios place ‘you’ at the scene), they are asked to abstract themselves from the situation to look at it more objectively. As the scenarios are deliberately scant on important details, this should force the participants to ‘confront their ignorance of essential facts’, instead of ‘simply forcing people to justify their opinions with explicit reasons’ (Greene, 2013: 297). It is my hope that this will counter the ‘rationalization’ phenomenon I expect will occur in the responses for scenario 2, if the participants are not ‘dumbfounded’.

Studies have shown that, on average, 80% believe that it is morally acceptable to pull the lever in the ‘Switch’ scenario, but only 15% believe it is morally right to push the man in the ‘Bridge’ scenario (Cushman et al., 2006; Greene, 2008). I expect the control group to follow a similar pattern. However, as the ‘Bridge’ scenario follows the ‘Switch’ scenario, I expect the second scenario will be viewed by the participants as being very similar to the first, yet their intuition/emotional response will be very different (‘disgust’). Therefore, such additional ‘negative framing’ may produce the cognitive dissonance of self-contradiction (Cao et al., 2017: 91), and so should also compound the ‘dumbfounding’ effect. It is my hope that the intervention group will be able

to overcome this ‘dumbfounding’ effect and the cognitive dissonance by abstracting themselves from the scenario and will be able to give more ‘rational’ justifications for their decisions with more ‘reasons’ and references to multiple causal chains.

Greene (2013) argues that moral decisions that are based on a deontological framework, such as Kantian ethics, are driven by intuition/emotion while decisions based on consequentialist frameworks, such as utilitarianism, are based primarily on reason. Recent theoretical developments by Cushman (2013) and Crockett (2013) state that these also reflect ‘model-free’ and ‘model-based’ learning systems, respectively. While model-free learning systems assign values to actions based on past-experience, model-based learning systems attach values based on internal models of causal relations in the world (Daw & Doya, 2006). By encouraging the participants in the ‘intervention group’ to think abstractly, outside of the situation, it is my hope that these participants will engage with this model-based learning mechanism and that multiple causal chains will emerge in their justification, regardless of their decision. This process of ‘distancing... buffer against emotional evocation’ and some evidence suggests that this may form ‘part of the developmental process in moral judgement’ (Decety et al., 2011: 306).

I predict that the ‘innovation’ for my intervention group will enable participants to give more detailed rational justifications in their responses for all scenarios, but it may even

change the likelihood that they will over-ride their initial intuition/emotion 'disgust' responses for scenario 2 and decide to 'push the man'. From a neuroscientific perspective, I expect amygdala activation for scenario 2 that will be mediated by the ventromedial prefrontal cortex (VMPFC) to produce the intuition/emotion response of 'disgust' that will drive 'rationalization' responses for most of the control group with corresponding activation of the dorsolateral prefrontal cortex (DLPFC). However, for the intervention group I expect this initial intuition/emotion response in the VMPFC to be immediately reappraised by encouraging activation of the DLPFC and forcing them to 'confront their ignorance essential facts' through thinking about 3 questions first, before reaching a decision. In theory, this activation should mean that the 'DLPFC's reinterpretation efforts reduce(d) the level of activity in both the amygdala and VMPFC' (Greene, 2013: 140). Essentially, I expect the "head" to reconsider the message from the "heart" and thus move from an overly intuitive/emotional 'model-free' learning mechanism to a 'model-based' one.

Critique of Research Methods

I have selected 8 willing participants from my social circle for the intervention. The small number reflects the initial stage for a reiterative process within design-based research. Due to my personal relationship with the participants, the study will be conducted over a mobile phone. It is well known that personal proximity can

sometimes result in emotional coherence and an effect on the 'body-budget', particularly if there is some form of intimate relationship involved (Barrett, 2017: 74-6). To attempt to mitigate against this affect, it is my contention that conducting a formal interview over the phone would be the best method. The participants have also been chosen for their political orientation as studies have shown that such dispositions affect moral judgement (Lakoff, 2016), the homogeneity of which will be verified by asking them to complete a survey on www.politicalcompass.org. I expect that they will all get roughly the same result as they all hold liberal views on a variety of topics. However, it is pertinent that such factors are verified and accounted for. They have also been selected for their intelligence as they all have degrees and/or are in management positions. This has been selected as criteria to take into consideration as intelligent people have been found to expend less effort and attention on difficult tasks (Kahneman, 2012: 35). I have also equally divided them into 2 groups with 2 males and 2 females in each as gender has also been found to effect moral judgements (Greene et al, 2009).

The task itself will involve participants spending roughly 12 minutes making decisions on 3 moral dilemmas under timed conditions. Scripts will be read and adhered to for both 'control' and 'intervention' groups. All tasks will be done in the early evening mid-week and participants will be allotted to a group based randomly on when they become available and schedule the phone call. The first 4 participants (2

male and 2 female) to schedule and arrange a date will be the control group. This is to ensure impartiality and equality and to limit potential bias.

All the conversations will be audio recorded and transcriptions will be made. This seems like the most unobtrusive method to collect the participants' responses, particularly having studied how many variables can have a negative impact on moral judgements. The sample size is also very small which may pose a problem when trying to generalize from the findings. I have also not factored personality type which may also be a limiting factor.

Final Report and Analysis

Data Collection and Ethical Considerations

Interviews took place with the 8 participants over mobile phone during the period from 29th January to 15th February 2018 on 4 different evenings. Audio recordings were taken, transcriptions were made and the responses were anonymised. The audio recordings were then destroyed. The scripts for these sessions can be found in Appendices A and B and the highlighted transcriptions can be found in Appendix C¹. The data is also

displayed in 2 bar graphs. Appendix D shows the binary responses for the Control Group and the Intervention Group to the question asked of each scenario. Appendix E shows a quantified representation of the 'reasons' contained in their 'justifications'. These 'reasons' have been highlighted within the transcriptions contained in Appendix C and then have been tallied for each response to display in the bar graphs in Appendix E. However, the tally for the 'Intervention Group' also contain the 'bullet points' as they are considered 'reasons' for their justification for the purposes of the study². The rationale, as well as the limitations of this approach, will be explored in the analysis below. I have also included field notes in Appendix F that were recorded after each session as well as 'screen shots' of the results from the www.politicalcompass.com test that the participants did online before participating in the moral dilemmas interview (Appendix G). Throughout the interview, as well as throughout the data collection and storage process, the BERA ethical guidelines for research have been adhered to and there were no incidents whereby participants reported feeling too uncomfortable or wanted to withdraw their consent. A

¹ The monikers for each respondent are designed to ensure anonymity and ease of analysis and can be found in the following format: Control Group (CG) and Intervention Group (IG) were then given the suffixes of 'M', to designate 'male', and 'F' to designate 'female' and then a number. So, for example, the first male to be interviewed in the Control Group is designated 'CGM1'. For ease of analysis I have also designated each participants' three responses for each scenario by adding the prefix '1', '2', or '3' corresponding to each of the

three scenarios. For example, the response for scenario 1 from the first male to be interviewed in the control group is designated '1 – CGM1'.

² For example, 1 – IGF2 contains 3 bullet points and one section of the response that has been highlighted, whereas 2 – IGM1 does not have any bullet points (as the respondent could not think of any), but has 4 parts of his response highlighted. Therefore, in the bar chart in Appendix E they have been graded as each having 4 'reasons' on the X axis.

copy of the consent form can be found in Appendix H.

Data Analysis and Discussion

Scenario 1

As can be clearly seen in Appendix D, the control group responded as predicted with just under 80% of respondents stating that they believe it is morally acceptable to pull the lever in the 'Switch' scenario, which corresponds with the findings of previous studies (Cushman et al., 2006; Green, 2008). However, the responses from the intervention group did not conform to norm with 100% of participants stating the belief that it is morally acceptable to pull the lever. This suggests that the 'intervention' had a significant effect on moral decision-making. Corroborating evidence can be found in the quantitative results on the number of reasons given, found in Appendix E, which clearly shows that the intervention group gave a lot more 'reasons' for their decision than the control group. By encouraging participants to abstract themselves from the situation before making a moral decision, it seems that the 'innovation' may have enabled them to accentuate the *impersonalness* of this particular dilemma and thus result in more abstract reasoning. From findings in neuroscience and moral psychology, we know that there are many sections of the brain used in moral decision-making that are also used in social-emotional processing (Green and Haidt, 2002), particularly the VMPFC (Greene, 2013), and that

these more intuitive responses often drive moral decision-making (Haidt, 2012). This even occurs in very impersonal moral dilemmas (such as the 'Switch' dilemma), hence why even in these cases 20% of respondents state that it is immoral to press the lever. For example, in 1 – CGF2 the respondent says that she "would feel responsible" (Appendix C). However, by encouraging activation of the DLPFC through abstract thinking in moral decision-making, it overrides or reinterprets the information received from the social-emotional processing centres of the brain, such as the VMPFC and amygdala (Greene, 2013). On the face of it, it seems this finding supports the notion that individuals can be taught to engage in more 'rational' decision-making when faced with moral dilemmas.

Scenario 2

Studies have shown that roughly 15% of respondents believe it is morally right to push the man in the 'Bridge' scenario (Cushman et al., 2006; Green, 2008). This is due to a combination of the personal nature of the dilemma (Greene and Haidt, 2002), the use of 'personal force' (Greene, 2013) and the perceived immoral severity of 'active harm' when compared to 'harms of omission' (Cushman et al., 2011). The results shown in Appendix D reflect the findings of the research done using this dilemma as 100% of respondents in the 'control group' believed that it is morally wrong to push the man off the footbridge with some respondents also referring to the

‘personal’³ and ‘active’⁴ nature of the dilemma. With such a small sample, the 25% difference between the responses of the control group and the intervention group could be significant. This inference is corroborated with the quantitative results of the reasons given (Appendix E) where it can be clearly seen that the intervention group gave many more ‘reasons’ than the control group. In addition, the qualitative data contained in the transcripts in Appendix D clearly show instances where a ‘model-based’ learning mechanism was adopted by at least 2 respondents as multiple causal chains are evidenced in their reasoning. Despite the seeming ‘rationalization’ of their initial intuitive/emotional decision, possibly based on ‘model-free’ learning, 2 – IGM1 mentioned that the people were “tied down” which implies a consideration of a causal chain regarding how they got there, particularly as they are perceived as “helpless”, and 2 – IGM2 mentions talking to the man on the bridge to discuss “our options” and considered using the backpack to “slow it down”. It is also significant that 2 – IGM1 highlights the abstract notion of “helplessness” and that 2 – IGF1 considers the meta-ethics with a focus on the use of the word “death” in relation to the causal chain of “becoming a murderer”. Both instances of abstraction indicate a much more nuanced and sophisticated process of moral decision-making.

In addition, there could be evidence of

the ‘dumbfounding’ effect as there was a slight reduction in the number of ‘reasons’ given by the control group as a whole. This could suggest that decisions were driven by intuitive/emotional processing, particularly as respondents may have recognised that the scenario is similar to the first and could have used similar ‘reasons’ in their justification, but chose not to. 2 – CGM1 noted that his response was “twisted logic compared to my first”, 2 – IGM1 referred to the “same logic from the previous answer”, and it could also be inferred from the response in 2 – CGF2 when she asked if she “had to wait 30 seconds”, that she believed that her justification would essentially be the same. There was an increase in the number of pauses in the responses given by the intervention group which may indicate the ‘dumbfounding’ effect. Paxton and Greene note that subjects often revise their judgements when they become conscious of the fact that ‘their initial judgements were *inconsistent* with their beliefs’ (2010: 10). This could have contributed to the ‘rationalization’ process that is evident for the 3 respondents who said that they would not ‘push the man’. For their judgements to not be *inconsistent* with their statement of belief on the first scenario, 2 – IGM2 explores causal chains that are prohibited by the instructions given in the scenario, 2 – IGF1 justifies her “becoming” by stating that causing “death” is qualitatively different from performing an action that will “kill” and 2 – IGM1 refers to the intrinsic “helplessness” of

³ 2 – CGM2 (“... feel as if I’ve just killed them”) and 2 – CGF1 (“I couldn’t physically”).

⁴ 2 – CGM1 (“I would be directly responsible”).

the 5 people which is more “readily apparent” than in scenario 1, thus paradoxically absolving him from blame in an act of omission as “it wouldn’t be down to me”. All justifications are clearly ‘rationalizations’ as they are irrational contradictions of their statement of belief in relation to the first dilemma and they often refer to subjective bias in their interpretation of the ‘facts’. While ‘model-based’ learning has the benefit of being flexible, it does seem to run the risk of “over thinking” with an ‘increased probability of error’ (Greene, 2017: 69).

2 – IGF2 reveals a very interesting aspect of moral decision-making that I had not anticipated. It seems that, while the other 3 respondents seem to have ‘rationalized’ their decisions based on the anticipated emotional response of disgust, instead of exploring the ‘model-based’ learning mechanism by explicating multiple causal chains in her justification, there are very few reasons given compared to the others and 2 of the questions asked refer to “sacrificing his life” which, initially indicates a possible ‘model-free’ mechanism for decision-making based on an intuitive/emotional response. However, if she was also aware of the inconsistency of her initial intuitive/emotional response in contrast with the first dilemma, that may explain it. She is the only respondent to start an answer with “I’m very uncomfortable with this”. In my fieldnotes in Appendix F I noted that she “seemed angry”. This is significant

as Baron et al. (2017) note that ‘anger may be associated with a utilitarian approach because it is largely about waste... (e.g. lives that could be saved)’. This is coherent with findings from neuroscience. The basis of Greene’s (2013) thesis is that the process of reasoning in moral decision-making (noted for its activation of the DLPFC) can reinterpret and reappraise signals from the intuitive/emotional system (correlated with activation of the VMPFC), which in turn integrates signals from the amygdala, among other neurological sub-systems (Pascual et al., 2013). Essentially, as there are ‘anti-utilitarian effects in the amygdala’ (Shenhav & Greene, 2014: 4745), this finding supports Greene’s thesis that reasoning in moral decisions can *inform* and co-construct intuitive/emotional processing (2013). I hypothesise that IGF2 initially experienced disgust at the thought of pushing the man, but that there was recognition that rationalizing this response in a moral decision would contradict the belief espoused in the previous scenario. This resulted in anger that was able to over-ride the initial experience of disgust. Such a re-appraisal ‘weakens the negative emotion’ which can further lead to ‘a more positive attitude toward a utilitarian response’ (Hu & Jiang, 2014: 2). The whole process of emotional conflict would certainly result in feeling “very uncomfortable”. This also corresponds with the ‘automaticity hypothesis’⁵ as ‘*overriding* the omission effect would require

⁵ ‘People have automatic mechanisms of moral judgement that are more sensitive to active harm

than the failure to prevent harm’ (Cushman et al., 2011: 1).

controlled, effortful cognition’ (Cushman et al., 2011: 1).

General Discussion

While the small sample size makes generalization difficult, a number of factors have emerged from the study that warrant further discussion. It seems, on the face of it, that the ‘intervention’ had a positive effect in producing a ‘model-based’ learning mechanism. However, based on these results, it is questionable whether such a model is qualitatively better when used in making moral decisions. The three respondents in the intervention group that decided not to ‘push the man’ gave many more ‘reasons’ than the control group, but these were often ‘rationalizations’ that either deviated from the instructions to explore causal chains that are forbidden (2 – IGM2), or discussed factors related to language (2 – IGF1) or the relation between the intrinsic properties of the ‘victims’ and moral culpability (2 – IGM1) that are logically incoherent⁶. Perhaps this relates to the ‘unconscious realism’ noted earlier and steps should have been taken to try and eliminate this. However, it is clear from this that quantitatively more ‘reasons’ does not trump qualitatively better ‘reasons’ in moral judgment, regardless of whether multiple causal chains are explored in the process or not.

This point is made more poignant

⁶ Both ‘justified’ their contradictory responses (compared to scenario 1) by absolving themselves from blame through appeals to ‘my’ use of language (“death”, instead of “kill”) or the apparent

given the responses from CGF2 and 2 – IGF2 which contain fewer ‘reasons’ but clearly contain strong emotional/intuitive responses, thus indicating a ‘model-free’ learning process. Despite being contrary to the initial normative judgement that initiated the study: more ‘reasons’ that explore more causal chains in the justification process is better (appeals to the ‘head’), these responses *feel* more valuable (appeals to the ‘heart’). 2 – IGF2 seems to indicate an instance of emotion regulation and utilization which, research on emotional intelligence shows, is indicative of high emotional intelligence (Mayer & Salovey, 1997; Mayer et al., 2004). This may have been prompted by the intervention, but this would not show in the results due to the methodology. In focussing on the ‘head’ and not the ‘heart’, a significant blind spot has emerged. A very sophisticated learning process may be involved here that is not picked up by the study due to a rational bias in methodology. Plus, the fact that it *feels* significant to me as the researcher led me to explore other explanations which are not included in my analysis above. A rational focus on the ‘reasons’ *felt* inappropriate.

Astuti and Bloch (2015) argue that moral psychology can learn from findings in anthropology regarding the ‘dumbfounded’ phenomenon. They argue that actions which breach certain moral taboos, such as killing and incest, elicit responses that operate within a ‘transcendent’ realm

helplessness of the victims, despite death being guaranteed in both instances. These are not logically defensible.

and relate more to intuitive, social dimensions of experience, rather than in the more limited, temporal and finite experience presupposed by individualistic moral decision-making dilemmas⁷. In this respect, an intuitive/emotional judgement may draw on wider ‘multiple levels’ of experience that cannot be adequately captured and explicated in everyday speech. In addition, in surveying the literature on moral judgements and political orientation, Lakoff (2016) states that those who are more ‘liberal’ often show greater empathy for others and can put themselves in the shoes of others more easily through the imagination. This finding is echoed by Haidt (2012) in relation to his ‘care’ module. Therefore, moral decisions based on such intuitions may not be as readily available to rational justification. 1 – CGF2 clearly shows emotional distress, but the verbal explication does not seem to reflect the gravity and depth of the decision-making process: something *feels* missing as though she had some moral ‘knowledge’ in the cognitivist sense that was not easily communicable within the confines of the experimental parameters. Both CGF2 and IGF2 struggled emotionally to remain consistent in their moral judgements and I suspect a deeper and more sophisticated moral decision-making process underlies these instances. Failure to acknowledge and account for these phenomena result in serious

limitations for the study.

⁷ It is interesting to note that their paper critiques Haidt’s ‘Social Intuitionist Model’ (SIM) for neglecting the ‘social’ and ‘intuitionist’ dimensions of experience as understood in anthropology. In moral psychology Haidt’s model may be viewed as

‘social’ and ‘intuitionist’ in relation to the more ‘rational’ dual process model of Greene, but not in relation to these terms as understood by Astuti and Bloch in anthropology.

Notes on Contributor

Andrew Botham spent 10 years working as a secondary school teacher, followed by brief periods teaching undergraduate sociology of education at Northumbria University and post-graduate educational research at Newcastle University. He is currently a doctoral candidate at Newcastle University specialising in metatheory, philosophy of education, the meta-crisis, and the role of emotion and values in education.

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Appendices

Appendix A

Script: Control Group

- Thank you for participating in this study. As noted on your consent form, any data collected from you will be kept strictly confidential.
- Can you say your name, age and occupation please?
- Can you confirm that you have eaten within the last hour and do not feel hungry?
- Can you confirm that you are alone in a room, are comfortable and that you have arranged so that you will not be disturbed?
- Can you also confirm that there are no images (pictures/posters) that have large eyes looking at you in the room?
- Finally, can you confirm that you are comfortable to proceed?
- Just to remind you that you can withdraw your consent at any time if you feel too uncomfortable.

- For each of the three scenarios the same procedure will be followed. I will carefully explain the scenario and ask you a question. I will then give you 30 seconds to make a decision, to consider the justification for your decision and also the factors that you have taken into consideration to make your decision. You are not permitted to ask any questions about the scenario and have to take the situation at face value – this is the only information that you will be given. You will then be asked for your response and will be given 30 seconds to give your decision, the justification for your decision as well as the other factors that you have considered when making your decision. Does this make sense?

- I will guide you through the process again for each scenario as we proceed.

- Moral judgments can be difficult to make, and we understand that people sometimes change their minds about moral questions or feel conflicted about the answers they've given. Don't think of your answers as "written in stone." All we want from you is a thoughtful first response.

- Are you ready?

Scenario 1: There is a runaway trolley barrelling down the railway tracks. Ahead, on the tracks, there are five people tied up and unable to move. The trolley is headed straight for them. You are standing some distance off in the train yard, next to a lever. If you pull this lever, the trolley will switch to a different set of tracks. However, you notice that there is one person on the side track. You have two options:

1. Do nothing, and the trolley kills the five people on the main track.
2. Pull the lever, diverting the trolley onto the side track where it will kill one person.

Is it morally acceptable to save the five people by pulling the lever onto the side track to kill the one person?

You have 30 seconds to decide.

What is your decision and justification? You have 30 seconds to respond.

Scenario 2: A runaway trolley is headed for 5 railway workmen who will be killed if it proceeds on its present course. You are standing on a footbridge spanning the tracks, in between the oncoming trolley and the five people. Next to you is a railway workman wearing a large backpack. The only way to save the five people is to push this man off the footbridge and onto the tracks below. The man will die as a result, but his body and backpack will stop the trolley from reaching the others. (You cannot jump yourself because you, without a backpack, are not big enough to stop the trolley, and there's no time to put one on.)

Is it morally acceptable to save the five people by pushing this stranger to his death?

You have 30 seconds to decide.

What is your decision and justification? You have 30 seconds to respond.

- This concludes our session. Thank you for your participation in the study. You will be contacted again in due course for a debriefing.
- Just to remind you that your responses are anonymous and that this recording will be encrypted and stored safely on an external hard drive. I am the only person who will listen to the audio recording and the recording will also be deleted once a transcription has been made.
- Take care and enjoy the rest of your day.

Appendix B

Script: Intervention Group

- Thank you for participating in this study. As noted on your consent form, any data collected from you will be kept strictly confidential.
 - Can you say your name, age and occupation please?
 - Can you confirm that you have eaten recently and do not feel hungry?
 - Can you confirm that you are alone in a room, are comfortable and that you have arranged so that you will not be disturbed?
 - Can you confirm that there are no images (pictures/posters) that have large eyes looking at you in the room?
 - Finally, can you confirm that you are comfortable to proceed?
 - Just to remind you that you can withdraw your consent at any time if you feel too uncomfortable.
-
- For each of the three scenarios the same procedure will be followed. I will carefully explain the scenario and ask you a question. I will then give you 30 seconds to think of 3 different questions you could ask about the situation. During this time you also need to make a decision and to consider the justification for your decision. Your questions about the scenario will not be answered, but the types of questions you ask are important to the study. After you have had 30 seconds to consider your response, you will be asked for your 3 questions. You will then be asked for your decision and will be given 30 seconds to give your decision and the justification for your decision. It is important to note that the 3 questions that you ask will not form part of the 30 second response time, so it is important that you explain the factors contained in the questions if you think they form part of the justification for your answer.
-
- Just to summarise – you will be told the scenario and asked a question. You will then have 30 seconds to come up with 3 questions about the scenario and to reach a decision. Then you will be asked for your 3 questions. Once these have been given you will be asked for your decision and for the justification and you will have 30 seconds to respond. Does this make sense?
-
- I will guide you through the process again for each scenario as we proceed.

- Moral judgments can be difficult to make, and we understand that people sometimes change their minds about moral questions or feel conflicted about the answers they've given. Don't think of your answers as "written in stone." All we want from you is a thoughtful first response.
- Are you ready?

Scenario 1: There is a runaway trolley barrelling down the railway tracks. Ahead, on the tracks, there are five people tied up and unable to move. The trolley is headed straight for them. You are standing some distance off in the train yard, next to a lever. If you pull this lever, the trolley will switch to a different set of tracks. However, you notice that there is one person on the side track. You have two options:

3. Do nothing, and the trolley kills the five people on the main track.
4. Pull the lever, diverting the trolley onto the side track where it will kill one person.

Is it morally acceptable to save the five people by pulling the lever onto the side track to kill the one person?

You have 30 seconds to decide.

What are your 3 questions?

What is your decision and justification? You have 30 seconds to respond.

Scenario 2: A runaway trolley is headed for 5 railway workmen who will be killed if it proceeds on its present course. You are standing on a footbridge spanning the tracks, in between the oncoming trolley and the five people. Next to you is a railway workman wearing a large backpack. The only way to save the five people is to push this man off the footbridge and onto the tracks below. The man will die as a result, but his body and backpack will stop the trolley from reaching the others. (You cannot jump yourself because you, without a backpack, are not big enough to stop the trolley, and there's no time to put one on.)

Is it morally acceptable to save the five people by pushing this stranger to his death?

You have 30 seconds to decide.

What are your 3 questions?

What is your decision and justification? You have 30 seconds to respond.

- This concludes our session. Thank you for your participation in the study. You will be contacted again in due course for a debriefing.

- Just to remind you that your responses are anonymous and that this recording will be encrypted and stored safely on an external hard drive. I am the only person who will listen to the audio recording and the recording will also be deleted once a transcription has been made.
- Take care and enjoy the rest of your day.

Appendix C

Transcriptions

Scenario 1

Scenario and Participant

Transcription

1 – CGM1

“Okay, my decision would be to... er... divert the trolley to the one person. Er... the reason being... it seems more important to save five people instead of one. Nothing more than that really... er... I suppose it just comes down to numbers in the end... to save the most people possible.”

1 – CGF1

“Okay, so my decision would be to pull the lever... erm... to save the five people... and em... to obviously kill the one person on the other track... em... The decision around this would be... there would be less of a loss of life if I did that. Erm... there would be less of an impact for the five people on the other track. Erm... obviously, this would be incredibly difficult to do... erm... and I would feel terrible about the other one person.”

1 – CGM2

“My decision is that I would pull the lever. Erm... I would base that on... having no additional information at this time I would have to assume that the only chance of someone getting to that person in time and untying them or whatever, would be if it was one person and saving everyone. Obviously, if there's five people you wouldn't be able to do that. So, the only possible way that no people would die would be that, and that would be my basis. And, also I would have to assess the situation because obviously if they were five really old people... then... if... you know... and a young person or a pregnant woman, that would make a difference... but... at this time with no other information it would have to be that.”

1 – CGF2

“Erm... I don't... argh! I don't think I could actually pull the lever and kill the other person. Erm... and, what do you need? A justification? A reason why? (“Yes. What's the criteria that you have considered to come to that decision?”) Erm... well, initially I kinda first thought... you instantly think... well... its five lives versus one life... and you think... do you think... do you want to save the five people or do you want to save the one person, so y'know... you think... is it better to save five people,

but I would feel responsible for pulling the lever and killing the one person(?) If that makes sense?"

1 – IGF1

- How old are they?
- Have they got criminal convictions?
- Do they have an illness or terminal disease?

"I initially thought do nothing as I'm not sure... a... if... either decision is right... erm... due... because I don't know... the answers. And I think... I couldn't stand by and do nothing so I would probably save one person... because if five people live then... it's better than 6 people die... er... 5 people die. So..."

1 – IGM1

"Er... ok... well, I'm actually quite familiar with this scenario so... but, erm... I would have to ask..."

- Who are these people?
- Do they have family?
- Are they, what could be classed, as a good person?

"Ok. So, the decision... er... it isn't morally right to flip the switch. But the logical decision is to avoid the greatest casualty and loss of life. So, unfortunately and regrettably, it would have to be to flip the switch to the track with the single person."

1 – IGF2

- Why are they on the train tracks? Why are they tied up? The reason for it...
- Are they family members?
- How old they are or how healthy they are?

"Because I don't know the answers to my questions my immediate response would be to... er... save five... pull the lever and save five people. Erm... the reason for that would be just to save more lives. If I'm out of other options I think in that scenario the most important would be to save more lives. But... I don't have any other choice."

1 – IGM2

- How far away am I from the train tracks?
- Who is tied up? Kind of... are they male, female? What age are they?
- How heavy is the trolley?

"Erm... I think it is morally just to pull the lever to save five

people. Erm... it is... if I do nothing it doesn't mean that I had nothing to do with it as I'm next to the lever. It is my decision. I either allow five to die or choose one dies so the choice to do nothing isn't really doing nothing. Erm... the question I asked, how far away am I? Am I close enough to run to save anyone?... erm... and then who's tied up? It would... because that might affect my thought process, like if it was five young children and one very old person. And then, how far is the trolley? I'm thinking am I able to stop the trolley myself? Can I save people by possibly sacrificing myself?"

Scenario 2

Scenario and Participant

Transcription

2 – CGM1

"I wouldn't push the railway worker off the bridge to save the other five... er... I would just have to let the trolley hit the five – the reason being I would be directly responsible for killing that one man, whereas I wouldn't necessarily be responsible for killing the five which would be an accident. Its twisted logic compared to my first answer but... *laughs* ...it is what it is!"

2 – CGF1

"Erm... my decision would be not to push the person. Erm... just... just because I don't think... erm... I couldn't physically... erm... do that and... er... physically kill somebody. I think for me... that... would be too much to do. Even though I would want to save five lives, I think I couldn't physically make myself do that."

2 – CGM2

"Er... to start with I wouldn't push the man onto the tracks to save the others... er... there's a couple of reasons... The main, fundamental reason... and that's just... the first one that popped into my head was... that... that contact with that person would feel as if I've just killed them *laughs*... but that is my own... er... my own moral compass. But... I just couldn't... I just couldn't justify killing someone purposely. Another decision was based on the fact that... it may save people but... I couldn't justify just killing... but... if that situation was occurring... it wouldn't be my first thought."

2 – CGF2

"Can I answer now or do I need to wait the thirty seconds? ("Sorry you have to wait the thirty seconds... just in case you change your mind") *laugh* Okay..." [time elapses] "Erm... I

wouldn't push the man. Erm... if it was my choice to save the people I would... and if *he* chose to save the people then that's his decision, but it's not my decision to take his life to save the others."

2 – IGF1

- Is there any way those five people can escape?
- How much time have I got to make that decision before I push?
- Do I get to talk to the stranger?

"I think no because you're using the word 'death' and I think that's changed my perspective on it because it makes me think that I'm becoming a murderer by saving five people. And so... morally... is the morally... the thing is... do I become a murderer to save other people? *illegible* So, no I wouldn't push him I don't think."

2 – IGM1

"Mmm... this is quite difficult... erm... I suppose... a question... would be... it's actually hard to think of any questions really for this one. Erm... why?... why?... Actually, I'm really struggling to think of any questions that would be er..."

[Moving on to the decision and justification]

"... [So what is your decision?] Er... I think in this one I probably wouldn't do anything. I think... er... its... its... its... so... down to fate, if you will. And, y'know... there's no... clear answer. I suppose the same logic from the previous answer could be applied here... I guess... but the difference is these people aren't tied down so... the immediate helplessness isn't readily apparent. And I guess... in this scenario it wouldn't be down to me to make the... er... to make the final call, if you will."

2 – IGF2

"I'm very uncomfortable with this. But... the questions would be... er..."

- Is there any other options... available... to us?
- Is it possible that we can put something together on the train tracks? What's lying around perhaps... without sacrificing his life?
- Erm... would he... erm... what is... what is his background? What kind of person he is. I would probably like to know that... before sacrificing his life.

“Again... erm... saving more lives...which is pushing him on the train. However, I’m very uncomfortable with that. On the train tracks yeah?... Erm... on the train bridge... on the footbridge... yeah.”

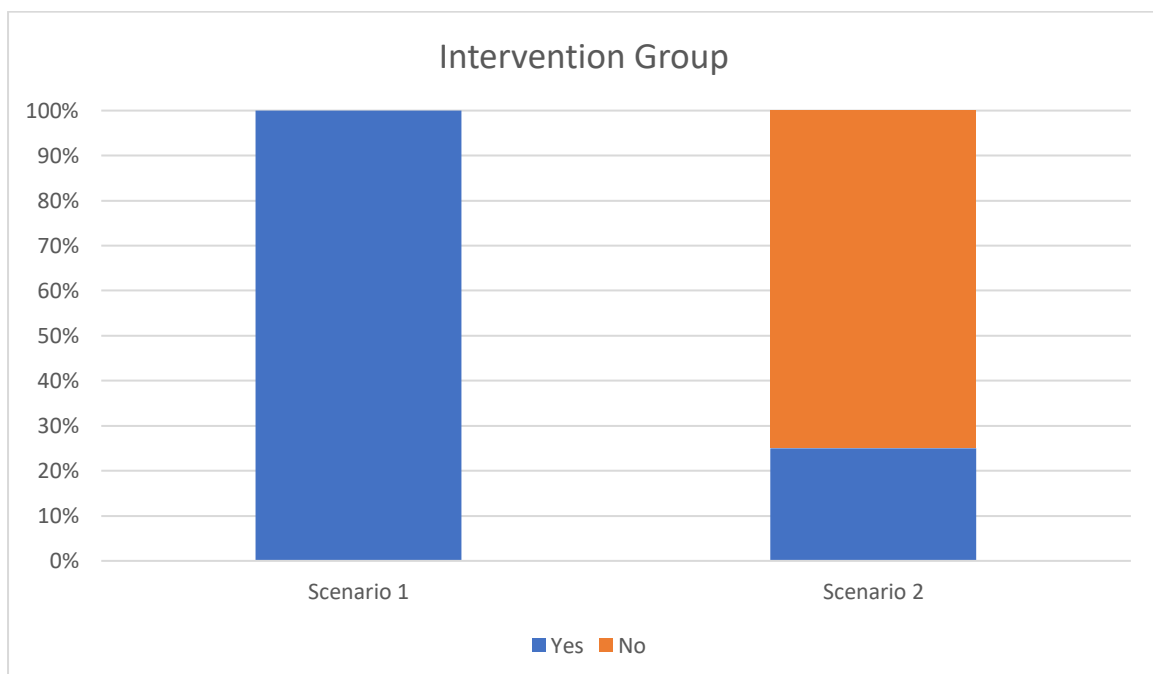
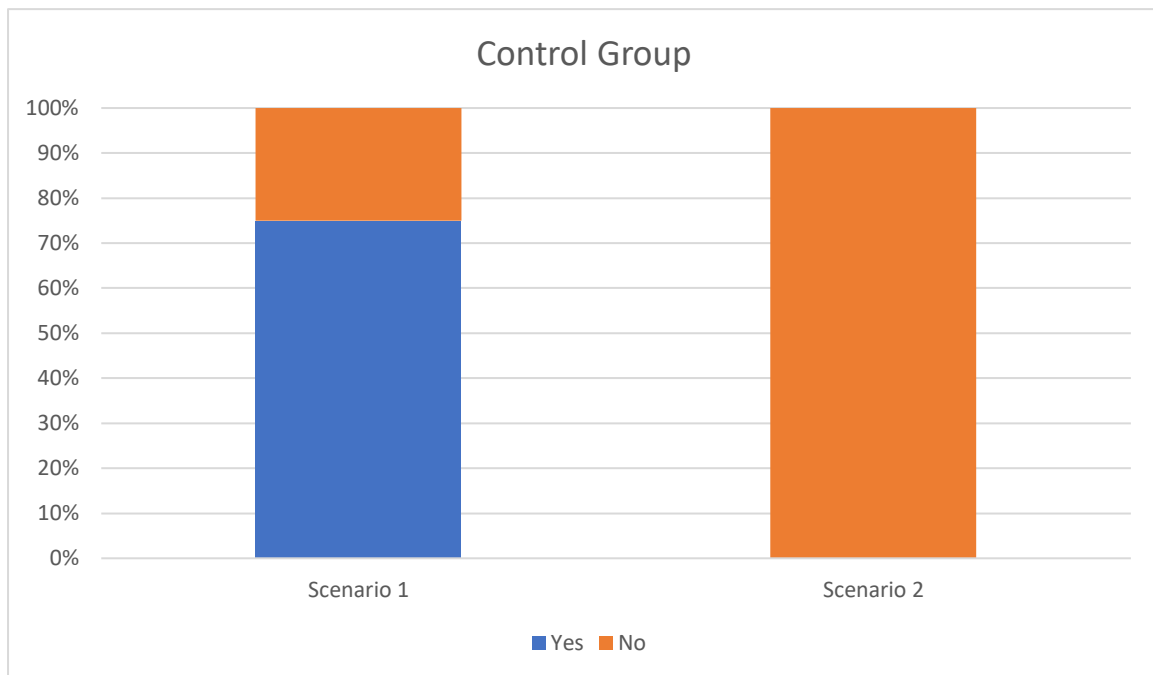
2 – IGM2

“Erm... I have only two questions... erm...”

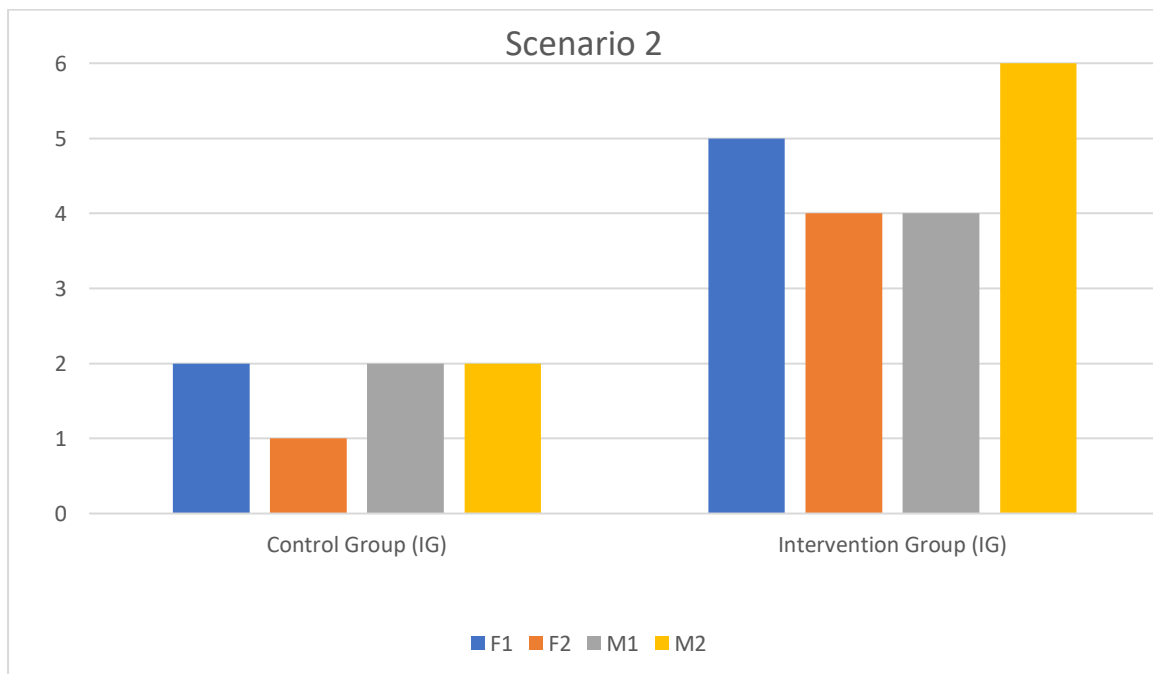
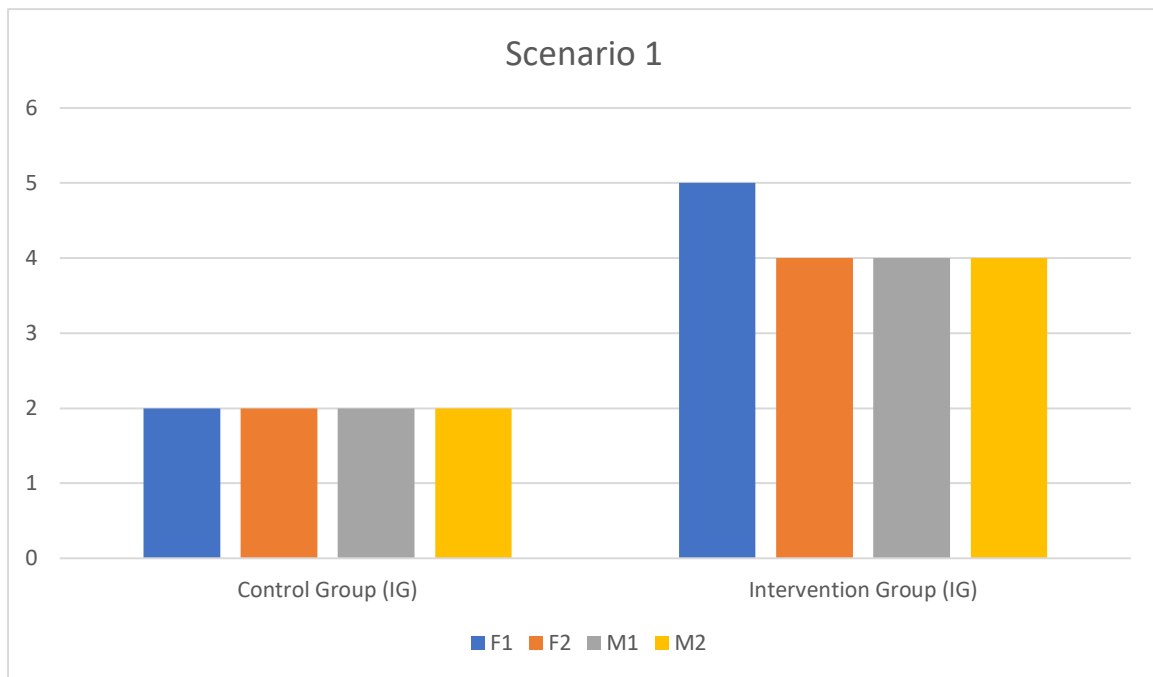
- Can the backpack be taken off in time? Erm... so *illegible*
- Is there anything else around that I can look to throw off? Erm...instead of the person?

“Erm... my decision wouldn’t be to push the person off. Erm... I may talk to the person about what our options are. Erm... and not encourage him, but make him aware that he could sacrifice himself but I think if I pushed him that would be... murder... because I’m actually pushing him off. Erm... even though it would be saving five people I have actively killed someone with my own hand... erm... who wouldn’t have died without my actions. Erm... the other thoughts are if the backpack just dropped off, then without the person that would be an option because throwing that in front of it may slow it down. Erm... something like that. That’s just... kind of my thought pattern...”

Appendix D



Appendix E



Appendix F

Field Notes

Control Group

Both CGF1 and CGF2 work, or have worked, within a professional context that requires working with young and/or vulnerable people. Such work necessarily entails training in child protection, client confidentiality, promoting and protecting individual rights and personal safety. This may have engendered a System 1 that is more 'liberal' in nature with regard to personal boundaries so that there is an emotional, empathic intuitive response when individuals have their personal boundaries and freedom impinged upon.

CGM2 is an engineer. After the intervention he mentioned that a situation like scenario 1 "has actually happened" and that they get training for situations like that as they deal with trains and railway workers all the time and have to be aware of the ethics involved in working in such potentially dangerous situations. Due to this training, perhaps CGM2 has been taught to engage System 2 more readily in such scenarios.

Intervention Group

IGM1 mentioned at the end of the task that he was familiar with the first scenario and had thought about it before.

IGF1 mentioned that she is a teacher and this could have influenced her response to scenario 3 as teachers receive a great deal of training on 'child protection' and have to deal with parents on a regular basis. It is possible that this participant has been approached by children and young people before and been asked to "keep secrets". As training in 'child protection' teachers are told that they must not keep secrets. They are under a legal obligation to report any suspected 'child protection' issue. Such training may have impacted upon her decision.

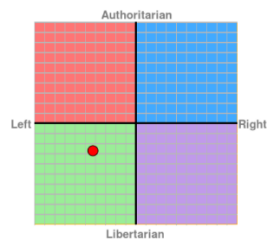
IGF2 seemed angry in her response for scenario 2. She is a practicing Catholic which may have influenced her responses.

IGM2 was in the process of moving house. He had a note pad with him and he had recently encountered the first two scenarios in a podcast that he had heard.

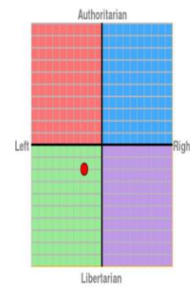
Appendix G

Political Compass Data

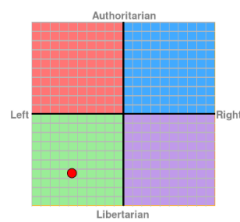
CGM1



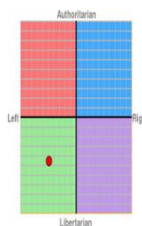
IGM1



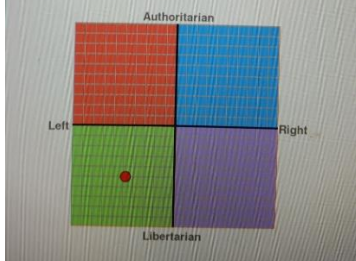
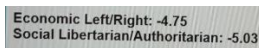
CGF1



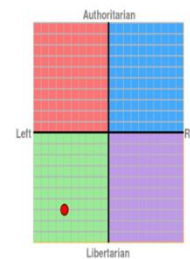
IGF1



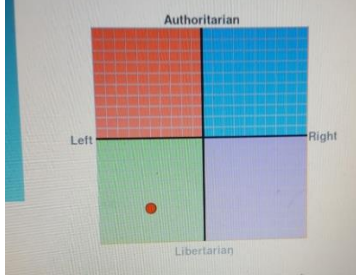
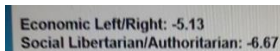
CGM2



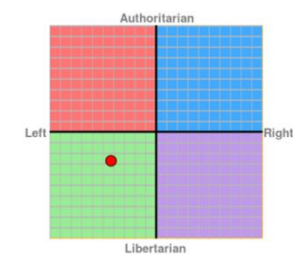
IGM2



CGF2



IGF2



Appendix H

Participant Information and Consent Form

About the Student and the Research

My name is XXXXXX. I am carrying out a small piece of research as part of my studies towards a Doctorate in Education with Newcastle University. The research is aimed at investigating learning processes and focuses on the role of emotion and reason in moral decision-making.

About the Activity

Participation in the research involves taking part in an activity over the phone during on one evening during Monday 5th February – Monday 19th February 2018. The tasks take around 10 minutes to complete. The activity will involve tasks requiring participants to make decisions on 3 different moral dilemmas and to explain the reasons for their decision. The dilemmas are designed to be difficult and so may make the participant feel slightly uncomfortable and this is to be expected, but it should not be too uncomfortable. However, if the participant feels too uncomfortable they may withdraw their consent at any time.

Safeguarding confidentiality

The task will be audio-recorded so that what happens can be analysed. These recordings will then be stored on a secure drive at the university or on an encrypted portable hard drive. It will only be viewed by myself and the supervising member of staff at the university, named below. The participant's name will not be used in the transcripts of these recordings or in any other part of the written report that follows and the audio recordings will be deleted once the transcripts have been made.

Should you have any concerns before, during or after the research is carried out

The module for which this research is being carried out is led by XXXXXX, a member of teaching staff at Newcastle University. Any concerns or questions as to the conduct of this research can be addressed to her at:

XXXXXX

Please be aware that you can withdraw from this research project at any time before, during or after you have participated.

Informed Consent

I understand what the research requires from me as a participant and I agree to take part.

Name and Signature: _____ **Date:**



“Some Assembly Required” – Understanding Race in Voltron: Legendary Defender

Lily Ferris

Abstract

Animation and science fiction are historically preoccupied with race, often engaging in harmful stereotypical representations while at the same time exhibiting a unique capacity, via animation’s hyper-realist medium and science fiction’s genre conventions concerning hybridity and the unknown, to deconstruct racial categories and resist racist ideologies. Using a combination of multimodal critical discourse analysis and narrative analysis, this study presents an overview of how characteristics inherent in animation, television, and the science fiction genre have been used to engage with race-related themes. Drawing on analysis of the animated science fiction serial *Voltron: Legendary Defender* (DreamWorks Animation 2016-2018), the study concludes that this media property constructs and then systematically blurs an Us/Other binary opposition between the protagonists (Team Voltron) and antagonists (The Galra Empire), implying that race is socially constructed, rather than innate. At the same time, however, the creators’ reliance on using species as a metaphor for race essentialises race rather than portraying it as a social construct, rendering *VLD*’s presentation of race contradictory and inconclusive.

Keywords: Us/Other, racial binary, critical discourse analysis, narrative analysis, television studies, animation studies, race in science fiction, cultural assimilation in media, essentialism

Contact: lily_ferris@outlook.com

Introduction

Science fiction regularly presents the relationships between fictional alien species as a metaphor for racial dynamics in the real world, offering overtly moralised readings that self-consciously decry racism or, conversely, stereotype-inspired representations that indirectly promote racist ideology. Science fiction also champions hybridity, constructing an Us/Other binary between humans and aliens and then subverting this binary and encouraging deconstructionist readings of race as a category (Linton 1999). In its multimodal critical discourse and narrative analysis of the animated science fiction serial *Voltron: Legendary Defender* (DreamWorks Animation 2016-2018, hereafter referred to as *VLD*), this study clarifies science fiction's relationship to race by answering the following question: Which strategies does *VLD* employ in engaging with race-related themes, and what is the outcome of said strategies? In addition to textual analysis, the study considers how extra-textual influences, such as corporate interests, have affected *VLD*'s ideological content at the production level in the limits placed on creators. The study concludes that *VLD* attempts to de-essentialise race by constructing and then systematically blurring an Us/Other binary opposition between the protagonists (Team Voltron) and antagonists (The Galra Empire) in order to demonstrate that race is socially constructed, rather than innate. However, the creators' reliance on using species as a metaphor for race essentialises race rather than portraying it as a social construct, rendering *VLD*'s presentation of race contradictory and

inconclusive.

Literature Review

VLD's storytelling is rooted in the mediums of television and animation, as well as how mass media and the science fiction genre, specifically, represent race. The literature review therefore begins by defining culture in the context of media discourse and presenting an overview of how race has historically been constructed in mass media. The fluid nature of television and animation, as well as rhetorical devices commonly employed by the science fiction genre, are then considered in their capacity to both challenge and subvert racist ideology.

Media Discourse and Culture

When analysing media texts, one must consider how they relate to the cultures that produce and consume them. Culture is "shared conceptual maps, shared language systems and the *codes which govern the relationships of translation between them*" (Hall 2013a, 7, original emphasis). Codes constitute a "system or set of rules that shapes how signs (units of meaning) can be used" and are influenced by power relations in society (Bignell 2008, 168). Thus, media texts should be contextualised in discourse, discourse being "a group of statements which provide...a way of representing the knowledge about...a particular topic at a particular historical moment" (Hall 1992, 291, cited by Hall 2013a, 29). Those who have more power in a society – in this study, power over media – have more control over

discourse and, thus, what defines, alters and perpetuates knowledge.

Key to Foucault's (1980) understanding of what he calls power/knowledge is that power both creates and restricts, casting individuals into subject-positions that support ideologies, which "attempt to fix meaning (knowledge)" to suit the interests of those in power (Barker 2005, 108-9). Subject-positioning also facilitates stereotypes – negative representations, usually of groups marginalised by society, which take "simple, vivid, memorable, easily grasped and widely recognized" characteristics about a person and "reduce everything about that person to those traits" (Hall 2013b, 247). Stereotypes are often conceptualised as binary oppositions, in which two concepts, one of which is usually subordinate to the other, are defined in contrast to each other (ibid.).

Race in Media

Race is the categorising of people based on perceived physical or biological differences and attributing characteristics such as intelligence or character to those groups (Barker 2005). These societally constructed signifiers are used by those in power to create and justify "a hierarchy of superiority and subordination" (Barker 2005, 61). Historically, mass media has been dominated by white, hegemonically masculine elites in positions of financial and socio-cultural power (Crane 2002). By casting certain races and other groups as "Other", these elites set up their own group identity as the superior, natural "Us" against which all other group identities

are measured. Lemish (2015) corroborates this theory via a statistical analysis of how racial, class and gender representations in children's television lack diversity. Contemporary studies (Ahmed & Abdul Wahab 2013, Gökçearsan 2010) support these findings.

Most television serials, *VLD* included, encourage the viewer to identify with characters psychologically rather than as "textual devices" imbued with ideology in their furtherance of the plot (Fiske 2006, 154). Thus, television both conceals and perpetuates and naturalises ideological perspectives. Hegemonic control over discourse and the naturalisation of ideology in media contribute to systemic stereotyping of marginalised groups, including marginalised racial groups.

Hall (2013b, 233) analyses how a Culture/Nature binary opposition is used in media to perpetuate harmful stereotypes about people of African descent: "Among whites, 'Culture' was *opposed to* 'Nature'. Among blacks, it was assumed 'Culture' *coincided with* 'Nature'" (original emphasis). According to Hall, media representations subject "blackness" to essentialism, whereby traits attributed to a category are treated as naturally occurring rather than constructed through discourse (Phillips 2010). However, this naturalisation is not prescribed to "whiteness", which is treated as a cultural product that can overcome nature. Thus, by asserting that black people are, unlike white people, unable to rise above their inherent natures, the Culture/Nature binary privileges whiteness over blackness and sustains racist ideology.

This binary further suggests that the only way for black people to rise above nature and be accepted by mainstream society is to adopt white cultural traits via assimilation, in which marginalised groups take on traits of the majority to escape persecution. This phenomenon is typified in media texts such as *The Cosby Show* (Carsey-Werner Productions 1984-1992) (Hall 2015).

Media is a construction, not a reflection, of cultural codes (Barker 2005). Thus, television serials cannot accurately represent race as it operates in the real world. Because of this, Hall (2013b) suggests that the best way for television to address racism is to highlight the arbitrariness of race as a category and deconstruct the power relations that underlie the construction of this categorising system. Hall's (1980) encoding/decoding model suggests that audiences need not be confined to the creator's preferred (encoded) reading of a text. More so than film, television is "open and multiple", allowing for fluid interpretations of storylines and characters despite formulaic genre conventions (Fiske 2006). Thus, television lends itself well to alternative or subversive decoding. In the age of participatory fan culture and transmedia, audiences even create unofficial texts that allow them to reimagine media to fit new perspectives (Booth 2017).⁸

Animation, like television, is fluid. Its creative potential originates in the foregrounding of its constructed nature.

8 Unofficial texts include "fanart" (fan-created visual art inspired by characters and events in the original text) and "fanfiction" (fan-created fictional narratives inspired by characters and

Where photographic film uses realism to disguise its role as a representation of reality, animation emphasizes its lack of realism and is, thus, able to reimagine the viewers' relationship with the real object being represented. Though modern visual effects in film and television now blur the lines between live action and animation, animation remains relevant in its ability to operate outside a society's ideological status quo, using its subversive characteristics to "represent alternative and radical agendas" and draw attention to the constructed nature of what a society takes to be objective truth (Wells 1998, 21). Animation is a simulation of live action film, which itself is a simulation of real movement. This second-order detachment affords animation a unique relationship with corporeality in that it can render a figure both familiar and alien, an example being the art of caricature, which exaggerates certain features of the subject for satirical effect. For this reason, animation is a popular propaganda tool, often used to denigrate marginalised groups such as the Jews in Nazi Germany (ibid.). However, animation's fluid, subversive relationship with reality also opens channels for exploring the constructed nature of categories such as race, class and gender and the relationships of power that constrain them (King et al. 2010).

The Other in Science Fiction

North American and Western European science fiction commonly feature binary

events in the original text) (Booth 2017). Both are usually shared with other fans via online communities.

opposition as a rhetorical device. The alien is usually presented as the unknowable Other against whom humanity defines itself, often drawing from ideological conflicts in the real world (Sardar 2002). For example, the unrelenting, hive-minded Borg of *Star Trek: Voyager* (Paramount Network Television 1995-2001) may be read as a critique of communist collectivism (ibid.). However, many conventions of the science fiction genre blur the distinction between “Us” and “Other” (Kerslake 2010). This is particularly true in postcolonial narratives in which the antagonistic Other is a colonial or imperialist force, such as the Empire from the *Star Wars* franchise (Lucasfilm). In reality, Othering strategies such as stereotyping and de-humanisation are used by colonial powers to justify oppression of specific groups (Said 1978). Ironically, science fiction narratives use this strategy in reverse, encouraging identification with the oppressed protagonist (Us) while casting the oppressive regime as Other.

Postcolonial science fiction is also preoccupied with cultural conflict and hybridity, often using conflict between alien species as a metaphor for nonfictional racial tensions. Vande Berg (1996), in her analysis of Worf from *Star Trek: The Next Generation* (Paramount Domestic Television 1987-1994), examines how Worf’s hybrid identity as a Klingon raised by humans is presented as a metaphor for multicultural people’s experiences. She claims that the discourse surrounding Worf is problematic, as it conflates culture and biology, essentialising his “warrior” nature as inherent to the Klingon species. Furthermore, Vande Berg

claims that the narrative’s emphasis on assimilation as a remedy for cultural conflict and the privileging of human over Klingon cultural practices perpetuate an ideology of cultural imperialism.

Methodology

This study employs Critical Discourse Analysis (CDA), which describes a family of methodological strategies that begins from a critical position identified by the researcher (Wodak & Meyer 2016). CDA is useful when examining how power is created and sustained through the control of discourse and seeks to de-essentialise social constructs such as gender roles and race. CDA’s goal is to critique and offer solutions for these power imbalances. For this reason, CDA is an appropriate starting point for the study, which is concerned with a critical perspective on misrepresentations of race in popular television. In particular, this study draws on Jancsary, Höllerer and Meyer’s (2016) multimodal adaptation of CDA, as it is able to encompass animation’s multiple modes of communication – visual, aural, written, etc. – while also accounting for a transmedia perspective that links a close reading of the text to ideological patterns found in the larger discourse of U.S.-produced science fiction programming.

Because CDA operates from the researcher’s assumption that the text being analysed connects to a systemic societal problem, the data collected is filtered through the researcher’s ideological lens, leading to conscious or unconscious bias (Schegloff 1997).

Furthermore, defining what constitutes a “societal problem” and asserting that such problems are reflected in specific texts is considered by some researchers to be too positivistic (ibid). For this reason, the author suggests that her research not be approached in isolation but, rather, be located within a larger discourse of existing studies (Hall 2013b, Vande Berg 1996, Kapell 2006, Wilhelm 2006, Lemish 2015), which offer diverse perspectives and methodological approaches to similar texts and themes.

Elements of narrative analysis – specifically narratology, which treats narrative as a genre and is generally associated with literature and film – will also be used to chart the text’s storytelling patterns (De Fina & Georgakopoulou 2012). In his work on television theory, Fiske (2006) explores media narratives as sense-making functions corresponding of Barthes (1972):

1. Paradigmatic function: Building a sense of character and setting
2. Syntagmatic function: Linking events temporally and rationally via cause/effect

This study charts how *VLD*’s choices in terms of character design and world building (paradigmatic function) interact with narrative progression (syntagmatic function) and what this interaction reveals about the text’s ideological influences.

Narratology has been rightly criticised for being too deterministic in that it

attempts to retroactively map individual narratives onto existing templates without considering the participatory nature of meaning construction or the cultural, socio-historical differences that affect text construction and audience interpretation (De Fina & Georgakopoulou 2012). However, television serials usually do use pre-existing narrative templates, as such templates are familiar to audiences and expedient when writing on a deadline (Bignell 2008). *VLD* is among such texts, making narratology a favourable approach (Kelley 2017).

Research Procedure

This combination of CDA and narrative analysis will be used to answer the following research question, as contextualized in subsequent sub-questions: Which strategies does *VLD* employ in engaging with race-related themes, and what is the outcome of said strategies?

1. What textual strategies does *VLD* use in the initial construction of the Us/Other binary between Team Voltron and the Galra Empire?⁹
2. What strategies does *VLD* use to deconstruct this binary as the narrative develops?
3. How does the ideological position on race expressed in *VLD* relate to the climate of the

9 Team Voltron are the protagonists (consisting of the five human paladins (pilots) of Voltron and two Alteans, Princess Allura and Coran. The Galra Empire are the antagonists and are led by

Emperor Zarkon, whose goals are to take over the universe and regain control of the Voltron Lions.

contemporary television industry?

The researcher will answer these questions via collection and analysis of the following data from the primary text:

1. Patterns of character appearance (colour schemes, facial features, etc.)
2. Narrative content concerning culture, species or race

From secondary texts, such as showrunner interviews, the researcher will consider:

1. How industry conventions have influenced *VLD*'s production and distribution

Analysis will be conducted via the following multimodal CDA framework, based on Jancsary, Höllerer and Meyer (2016) with alterations made to consider narrative development. Steps 1 through 3 constitute the Analysis. Step 4 corresponds with the Discussion.

1. Genre characteristics
2. What is the text's historical and sociocultural context?
 1. Who are the producers and consumers of the text?
 2. Which genre conventions are manifested in the text?
3. Manifest content analysis
 1. Which modes of communication are being implemented and to what effect?
 2. How do the multimodal elements interact with each other?

4. Textual themes
 1. How do the multimodal elements interact with the text's themes?
 2. How do the multimodal elements and themes evolve with the narrative?
5. Socio-cultural connection
 1. How does the context of production affect the text's ideological content?
 2. How does the text fit into existing discourse?

Analysis

VLD is an animated science fiction serial consisting of 78 20-minute episodes split into eight seasons (the final eighth season was not released at the time this study was compiled). *VLD* was produced by U.S.-based DreamWorks Animation, but the majority of animation labour was handled by Studio Mir in South Korea. Thus, *VLD* is a product of international co-production with an asymmetrical power relationship, which favours DreamWorks in terms of creative control and revenue.

VLD's premise is as follows: Five humans and two Alteans, the last survivors of an alien species, fight the Galra, a species led by a totalitarian leader, Emperor Zarkon, who, for 10,000 years, has been using violence to conquer the universe (Cregg 2017). The protagonists, called paladins, fight using sentient, lion-shaped spaceships, which combine to form the humanoid robot, Voltron.¹⁰

¹⁰ For full synopsis, see Appendix A

VLD draws inspiration from Japanese anime, particularly the mecha genre¹¹ (and is a reboot of *Voltron: Defender of the Universe* (World Event Productions 1984-1985), itself a re-packaged version the anime *Beast King GoLion* (Toei 1981) (Drazen 2003). Key to showrunners Joaquim Dos Santos and Lauren Montgomery's vision of the reboot was the desire to present a progressive story that tackles such themes as race, gender and sexuality (Kamen 2017).



Lions of Voltron



Voltron Assembled

Figure 1: 5.1 & 5.2

¹¹ For further explanation of the mecha genre, see Appendix B

Character Design

Initially, *VLD*'s character designs follow a common science fiction trope in which villains appear less human than the protagonist (Sardar 2002). This inhumanity is often constructed from an amalgamation of familiar features that, when combined, create something alien and grotesque (Kawin 2012). Embodying this physical Otherness, the typical Galran is taller and more muscular than the average human, with purple fur, bat-like ears, a reptilian nose, claws, sharp teeth and yellow eyes. Another tactic of de-humanization used in *VLD* and similar media is to conceal the

At the same time, Team Voltron's character designs break with hegemonic antagonist's features and present bodies that appear unnatural (Wilhelm 2006). For example, Galran armour comes with a helmet that obscures the wearer's face, and many have disproportionate prostheses that distort their bodies' natural symmetry. Furthermore, the Galran colour scheme is grey, black, red and lurid purple, colours associated with villainy in visual media, and objects in their world are cruelly angular, eschewing the soft curves associated with nature and balance (Zhu & Hu 2008).

Conversely, the heroes of Team Voltron, whether human or Altean, are humanised from the first episode. Each of the seven main protagonists has a unique look in terms of skin and hair colour, facial features and body type,

and their facial features are nearly always visible. At the same time, Team Voltron's character designs break with hegemonic science fiction conventions by representing racially diverse human characters (Shiro, Lance and Hunk are non-white), affirming the showrunners' commitment to diversity (Kamen 2017). The Alteans, Princess Allura and Coran, appear human, aside from possessing iridescent eyes, subtle facial markings and pointed ears. Taken together, each character is familiarly human, while also possessing a unique look, visually inviting identification and sympathy from the audience. Furthermore, the Altean colour scheme – white, pink and blue – is one associated with purity and virtue, and the streamlined edges of their ship suggest a balance with nature (Zhu & Hu 2008).

Ideology

The second difference initially constructed between the Galra Empire and Team Voltron (and, it is implied, Altean culture) is ideology, as shown by the following binary oppositions:¹²

As shown in table 1: A, Team Voltron's ideology can be characterized by democratic values such as equality and cooperation.

Though willing to sacrifice much for their cause, Team Voltron also champion freedom and individualism, believing that individuals have the right to choose their own path. For example, they support the Green Paladin, Pidge, taking

¹² For data sample regarding ideology, see Appendix C

time to look for her family during the war effort.¹³ Not only does the officers' contempt stem from prejudice against Lotor and his officers' "half-breed" status, but Lotor's shunning of Galra hierarchical structures appears to them both dishonourable and "dangerous".

Furthermore, the narrative supports the idea that the achievement of personal goals facilitates the achievement of group goals, as when Pidge rescuing her father and brother allows them to warn Earth of the Galra threat. The Galra, on the other hand, follow a hierarchical power structure, determined by expertise in battle and pure Galra bloodlines. Prizing obedience, they view personal initiative as destabilising rather than helpful. This sentiment is made clear in the Galra elite's view of Prince Lotor, Zarkon's son, who is half Altean:¹⁴ Team Voltron and the Galra's views on individualism and hierarchy also tie into how they view life and the relationship between ruler and subject. Self-sacrifice is a recurring motif in *VLD* and is viewed as honourable by both sides.¹⁵ However, because Team Voltron believes in life's inherent value, they believe sacrifice must be an individual choice, as when the Blue Paladin, Lance, offers up his paladin status because of a personal conviction that there are better pilots who could take his place.¹⁶ In contrast, the Galra Empire instils the belief that all subjects are expendable in service to

the Empire. Sacrificing oneself or others to further Zarkon's goals is not only acceptable; it is expected. This "cult of death" mentality, as Eco (1995, 7) puts it, is symptomatic of fascist governments, which view individual life as secondary in importance to the regime.

¹³ S4E2, "Reunion"

¹⁴ S3E1, "Changing of the Guard" (conversation occurs while discussing a possible bid for leadership of the Galra Empire while Emperor Zarkon is in poor health)

¹⁵ For sample of self-sacrificial behavior, see Appendix D

¹⁶ S3E2, "Red Paladin"

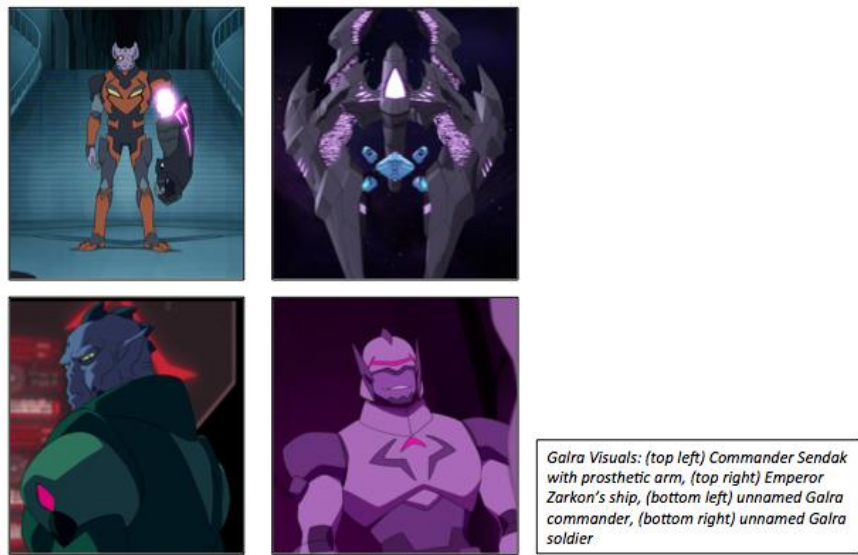


Figure 2: 5.3



Figure 3: 5.4 & 5.5

Team Voltron	Galra Empire
<ul style="list-style-type: none"> • All species are equal • Diplomacy before violence • Ruler serves the people • Freedom strengthens the group • Emotional connections are a strength • Life is inherently valuable 	<ul style="list-style-type: none"> • Galra are superior to other species • Violence preferred, no compromise • People serve the ruler • Obedience strengthens the group • Emotional connections are a weakness • Life is valuable in service to the Empire

Table 1: A

General:	I've heard rumours that he fights alongside his enlisted men like a lowly private.
Comd. Throk:	Worse than that, his top generals aren't even pure Galra. They're half-breeds at best. He has no honour.
General:	Some say he allows the planets he conquers to continue to rule themselves. Can you imagine?
Comd. Throk:	Clearly he's a dangerous lunatic.

Table 2: B

Keith:	I'm not an alien.
Hunk:	Well, you're kind of an alien. You're way more alien than me. <i>(Keith tries to change the subject)</i>
Hunk:	Was-was your mom the alien? Your grandpa? How Galra are you? ... The Blade of Marmora. They're real tight-lipped. I get that your society is secret, but is everything a secret?

Table 3: C

Galra Soldier:	Do you think I could get assigned to Zarkon's unit? <i>(shrugs sheepishly)</i> Nothing happens on this ship.
Allura:	<i>(flustered)</i> Oh, well, I don't know. <i>(leans against a wall in an attempt to appear casual)</i> What's your bloodthirstiness level on a scale of one to five? One being
Galra Soldier:	"no, thanks. I'm full," and five being "unquenchable?" Hmm...if I'm being honest, about a three.

Table 4: D

Evolving Narratives

Initially, *VLD* treats the Galra as a monolith, naturalising their ethos so that violence and racism seem inescapable aspects of Galra biology. As the narrative progresses, however, it challenges these representations. Initially, the majority of Galra soldiers are faceless, one-dimensional villains. Much Galra Empire ideology, whether it be the “cult of death”, proclivity towards violence or faith in an all-powerful leader, incorporates aspects of historical fascism (Paxton 2005). Another fascist element mapped onto the Galra is a sense of species (a stand-in for racial) superiority, which they use to justify colonisation of other species and exploitation of their planets’ resources, the prime example being their extraction of living beings’ quintessence, the mystical force that sustains *VLD*’s marks an ideological blurring that continues as the narrative evolves (Wilhelm 2006).¹⁷ Mapping historical human failings onto the Other, as in the equation of fascism and Galra Empire ideology, The first deviation from this pattern occurs in Season 1 when Allura uses her shape-shifting abilities to trick an Empire soldier into thinking she is Galra:¹⁸

In this soldier’s desire for promotion, the extremist “victory or death” mentality is reworked as a mundane desire to network, and his “bloodthirstiness” is reduced to a number. This banality, juxtaposed with the fantastical science

fiction setting, adds levity. More importantly, it is familiar. Audiences living in advanced capitalist societies, where *VLD* is primarily broadcast, can relate to the desire to break free from a dead-end job.

¹⁷ Quintessence is valuable in *VLD* because it can be used as a clean, sustainable power source. However, over-exposure to

quintessence can cause individuals’ worst character traits to be exacerbated.

¹⁸ S1E10, “Collection and Extraction”



Figure 4: 5.6

The Galra monolith continues to crumble as subsequent seasons present more varied Galra characters, including the Blade of Marmora, a resistance movement combatting the Empire from within.^{19 20}

Further complicating the construction of the Galra in Season 3 is the revelation that Zarkon was the original paladin of the Black Lion.²¹ Zarkon even married Honerva, a gifted Altean alchemist who would be Lotor's mother and, later, the antagonistic witch, Haggar. This is

communicated via a series of flashbacks, which present Zarkon as a brave, capable leader humanised by his romantic feelings for Honerva. Thus, his transformation into a vindictive tyrant due to over-exposure to quintessence is not without a degree of tragedy. Notably, the narrative suggests that Zarkon is not entirely at fault for his fall from grace, presenting Honerva's influence and quintessence's addictive properties as also culpable. Even the act that leads to Zarkon's full transformation into a villain is one of love – his misguided attempt to

¹⁹ S2E8, "The Blade of Marmora"

²⁰ For supplementary examples of ideological blurring, see Appendix E

²¹ S3E7, "The Legend Begins"

save Honerva from illness by exposing her to quintessence. Visually, flashback-era Zarkon and Honerva have softer, more expressive features, only taking on their sharp, haggard appearances as quintessence twists Zarkon's leadership skills and Honerva's intellectual curiosity into megalomania and greed:

Externalising moral degeneracy on the characters' bodies heightens viewers' discomfort, taking what they perceived as familiar and good and showing it twisted into something physically horrifying. Furthermore, by showing that an Altean such as Honerva could be negatively influenced by quintessence, the narrative implies that Zarkon's fall was not due to his inherent Galra-ness but, rather, a personal lack of judgment. By presenting Honerva's corruption, this episode casts doubt on what, until now, has been considered the incorruptible nature of the Altean species.²²

Character Hybridity

Certain characters embody the blurring of the Us/Other binary, creating liminal ideological spaces for *VLD*'s narrative to explore. One such character is Keith, Voltron's Red (and later Black) Paladin, who is revealed to be part Galra.²³ Skilled both as a pilot and in hand-to-hand combat, Keith is initially a volatile, impulsive loner who, rather than follow orders or work as part of a team, makes most of his decisions based on instinct and personal desire. His

character arc revolves around learning to curb his impulsive behaviour to become a good leader. He does so by training with the Blade of Marmora and gaining an understanding of the importance of teamwork and restraint through his exposure to their interpretation of Galran culture. This synthesis of Galran and Team Voltron values allows him to become an effective leader by balancing individual and group interests. Keith's hero's journey is formulaic as far as television character arcs are concerned (Mackey-Kallis 2010). What makes his story unique is how it reveals problematic behaviour within Team Voltron. Upon learning of Keith's Galran heritage, Allura treats Keith with uncharacteristic coldness and distrust motivated by a prejudice towards the Galra for destroying her home planet.²⁴ Though the narrative clarifies the root of Allura's anger, and she later apologises for her actions, her racist behaviour goes against Team Voltron's values of equality and diplomacy. Hunk also has trouble coming to terms with Keith's background:²⁵ *table D*

This exchange parodies casual racism experienced by real diaspora communities, echoing the "but where are you really from?" sentiment that labels individuals as Other without their consent (Cheryan & Monin 2005). Additionally, though Hunk uses the term "alien" to refer to extra-terrestrials, the word is also used to refer to immigrants

²² For supplementary examples of ideological blurring, see Appendix E

²³ S2E8, "The Blade of Marmora"

²⁴ S1E1, "The Rise of Voltron"

²⁵ S2E9, "The Belly of the Weblum"



Figure 5: 5.7

in the United States, further politicising the scene. Even when Keith distances himself from Galran identity, Hunk uses his newly discovered heritage as an identity marker and attributes certain characteristics, such as being “tight-lipped”, to that identity. This coincides with Phillip’s (2010) first form of essentialism in which certain characteristics are attributed to all members of a group, disregarding exceptions as deviant.

Though not integral to the plot, this scene picks up two episodes later, with Keith angrily exclaiming, “I didn’t just turn Galra!” and “are you trying to see if my skin is purple?” when Hunk tries to discern whether he has stereotypically Galran colouring.²⁶ This continuation suggests the writers intend to foreground the relationships between alien species as a metaphor for the relationships between different racial

groups. Like Keith, Prince Lotor synthesises his mixed background into a unique, effective form of leadership. However, despite their shared hybridity, Keith and Lotor’s character arcs develop differently. Employing the “species as a metaphor for race” theme, Keith can be said to “pass” as human. Conversely, Lotor’s appearance is more ambiguous:

While his lavender skin is reminiscent of Galran physiology, Lotor’s high-arched nose, pointed ears and long hair also reflect Altean heritage. In terms of ideology, Lotor also blurs the lines between Galran and Altean traits. In line with Altean culture, he favours diplomacy, using his eloquence and natural leadership skills to get his way. However, Lotor also embodies many

Galran qualities, most of which are coded as negative. For instance, he relies on physical force when he cannot win with words and subscribes to a “by any means necessary” policy in his

²⁶ S2E11, “Stayin’ Alive”

Lotor:	<p><i>(taunting Allura during battle)</i> Once I wipe out Voltron, I'm going to start a new Altea. An Altea that will never know of Princess Allura or King Alfor. Nor will they know of the Lions of Voltron. All they'll know is me, their great leader! <i>(laughs)</i> I'm ready to wipe the universe clean of all my enemies! Voltron, Haggar <i>(camera zooms in on his face)</i> and the rest of the Galra.</p> <p><i>(cuts to split shot of Lotor's Galra generals looking horrified)</i></p>
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Table 5: E



Lotor (left) is cast out of Oriande; Allura (right) is granted access

Figure 6: 5.8

willingness to sacrifice and manipulate others to achieve his goals. Moreover, though Lotor seems egalitarian on the surface, he is eventually revealed to be very much wedded to the fascist, Galra Empire belief that the will of the regime is synonymous with the will of its leader, a role he believes should fall to him.

Illustrating all of the above, Season 6 reveals that Lotor used his charisma and knowledge of Altean culture to gain Altean refugees' trust, only to betray them by draining their quintessence to power his ships.²⁷ Lotor attempts to justify this unwilling sacrifice by claiming his actions were in pursuit of a peaceful universe, but his dictatorial, racist intentions are revealed when Allura, with whom he has developed a romantic relationship, turns against him:²⁸

The “cleaning” metaphor suggests that Lotor also holds racist beliefs, which, though rooted in Galra Empire ideology, are ironically directed towards the Galra. Moreover, Lotor demonstrates Zarkon's megalomaniacal tendencies as he fantasizes about becoming ruler of a “new Altea” and erasing both Team Voltron and his own Galran heritage from history to maintain the coherency of his species-based, nationalistic rhetoric. Furthermore, his exclusion of Allura from “Altean” identity employs the same essentialist tactics that were used to marginalise him by Galra elites (Phillips 2010). However, it becomes clear by Season 6 that Allura is a more effective leader. This efficacy is directly linked to her Altean identity, a point

foreshadowed prior to Lotor's defeat when the two visit the temple of Oriande, where Alteans judged worthy may learn the secrets of Altean

This revelation of Lotor's true intentions enforces a hierarchy between the Galran and Altean sides of Lotor's identity, painting Altean traits as desirable and Galran ones as an unavoidable flaw, which prevents him from reaching his moral potential. This fatalism reaffirms the juxtaposition the narrative draws between Lotor and Allura. On the surface, both characters are physically attractive, natural leaders of royal heritage who have an affinity for Altean magic. Furthermore, they have both experienced incredible adversity – Allura through the death of her father and loss of her home planet and Lotor through a life spent ridiculed by the Galra alchemy.²⁹ Once in Oriande, they are separated and subjected to a test by the temple guardian, the White Lion. When attacked by the White Lion, Allura seeks a peaceful resolution by offering up her life, symbolically opening her mind to Oriande's wisdom when she says, “I seek the secret of life. I give my own”. Lotor, on the other hand, gives in to his anger, shouting the Galran expression “victory or death” as he attacks the lion in return. Because of this, he is expelled from the temple, while Allura is granted access – facts underscored visually when Lotor's violent act throws him out of sync with Oriande's traditionally Altean colour scheme, which bleeds into an ominous

²⁷ S6E4, “The Colony”

²⁸ S6E6, “All Good Things”

²⁹ S5E6, “White Lion”

Galra red:

In this episode, factors contributing to Allura's success coincide with values that have been repeatedly attributed to Altean culture and Team Voltron, namely resolution through diplomacy and respect for life. Meanwhile, Lotor's Galra-linked beliefs that violence instils order prevents him from doing the same. Lotor initially gains access to Oriande. However, his failure to successfully assimilate Altean values brings about his dismissal. This suggests that Altean culture is inherently better than Galran culture and implies that assimilation is the best option available to the Other who wishes to succeed. Lotor is blamed for his failure to "pass" as Altean, and his failure to obtain Oriande's secrets is linked to an inability to overcome his Galran traits, which are positioned as inferior to Altean ones. Moreover, upon receiving Oriande's secrets, Allura is told by a disembodied voice that the knowledge she seeks is "already within". This suggests that the test was, for Allura, a formality. Conversely, it must "already" have been known that Lotor was not worthy, further compromising his agency outside the essentialised traits the narrative prescribes.

Thus, despite attempts to humanise and de-Other the Galra, the binary that privileges Altean culture and Team Voltron's ideology is maintained. Furthermore, by denying Lotor the ability to change over time, while giving protagonists such as Allura the chance to overcome their flaws (as she does in re-evaluating her racist views towards the Galra), *VLD* reduces Lotor to a static embodiment of conflicting cultures, a

conflict that naturalises negative Galran traits and paints Lotor as doomed by his heritage in a similar vein to the tragic mulatto stereotype (Hall 2013b).

Discussion

VLD's ideological position on race is contradictory and fragmented. On one hand, the narrative challenges the concept of race by deconstructing the Us/Other binary between Team Voltron and the Galra Empire. This deconstruction begins with the introduction of visually and ideologically diverse Galran characters before expanding into essential plot elements. However, attempting to embody these narrative themes within hybrid characters, particularly Lotor, reveals a fundamental misconception in the text's definition of race; *VLD* treats race as biological rather than socially constructed. Furthermore, the text suggests that some races are inherently superior to others and that culture can be neatly divided along racial lines. This conflation stems from the "species as a metaphor for race" rhetorical device, which is common in science fiction parables denouncing racism, but overlooks race's discourse-based origins.

Additional science fiction conventions also problematize *VLD*'s depiction of race. As mentioned in the literature review, science fiction reduces imperialist regimes to a simplistically evil Other in order to render the protagonist more likeable. Therefore, while Team Voltron may be oppressed in the story, the Galra Empire are oppressed in terms of narrative perspective. This narrative encoding of the Galra as Other

encourages the audience to view the Galra's physical and cultural differences with distrust that, in the real world, contributes to racist ideology.

Moreover, *VLD* is problematic in its promotion of assimilation, which places the onus for alleviating inequality on the shoulders of the oppressed without demanding change from institutions and other societal structures that perpetuate discrimination. In *VLD*, this is echoed in Keith and Lotor's divergent fates. Keith, though accepting his Galran heritage, ultimately decides that his place is with Team Voltron. Further, his lack of visually Galran characteristics allows him to pass as human. Therefore, he resolves his internalised prejudice and other insecurities while Lotor, in his inability to assimilate and ambiguous appearance, is left on the margins, accepted neither by Team Voltron nor the Galra. Though outside the parameters of this study, which focuses on construction of fictional species/races in *VLD*, it is worth noting that *VLD*'s treatment of human characters also fails to properly define race and indirectly promotes assimilation.³⁰

Television texts are constructed and, so, convey the ideological perspectives of the individuals and industry that created them. That being said, meaning is not prescribed; it is negotiated. Thus, fans' decoding of texts often include subversive readings, and many have sought to ameliorate *VLD*'s problematic renderings of race and other identity markers via the production and

distribution of "fanart" and "fanfiction" online (Lopez 2015, Kelley 2018). For this reason, future studies might employ fan studies to explore how *VLD* viewers have engaged with the text. However, as long as the animation industry values profit over fair representation, problematic portrayals of marginalised groups will continue. Though not explicitly related to race, this problem was made evident with the release of *VLD* Season 7, the marketing of which revealed Shiro to be gay and implied an upcoming romantic subplot. However, Shiro's love interest, ex-fiancé Adam, appears only twice in the 13-episode season and dies before they can be reunited. Fans, citing misleading marketing and the harmful "bury your gays" trope, reacted angrily (Peters 2018). In response, creator Joaquim Dos Santos (2018) acknowledged that the writers had anticipated fans' reactions and implied that, while the creators were committed to inclusivity, DreamWorks had limited their creative control because a gay relationship posed a risk to global distribution profits.

Conclusion

Animation and science fiction are uniquely suited to deconstructing race as a construct. As this study has shown, *VLD* in many ways succeeds in this, as it builds and then blurs the Us/Other binary. However, *VLD*'s reliance on species as a metaphor for race confuses the definition of race and the unique challenges racism presents. Furthermore, *VLD*'s treatment of hybrid characters promotes a preferred

³⁰ For more on racial representation in *VLD*'s human characters, see Appendix F

reading that privileges Team Voltron's ideological perspective and blames individuals who fail to assimilate. That is not to say that Galra Empire values of racial purity and conquest should be given equal moral consideration. What is lacking, however, is a cogent critique of race as a concept. Furthermore, the profit-driven nature of the television industry often inhibits creators, as seems to have been the case with Season 7 of *VLD*. Thus, in addition to pressurising conglomerates, media consumers should combat the homogenising forces of media convergence by supporting smaller media companies with the flexibility and motivation to present more progressive representations of race.

Notes on contributor

Lily Ferris graduated from Carleton College in 2013 with a BA in English and went on to earn an MA in Cross-Cultural Communication and Media Studies from Newcastle University in 2018. Her research interests include the cross-cultural co-production of media texts, particularly North American and East Asian media companies' collaboration on animated television serials and videogames. In particular, Ms. Ferris is interested in how media convergence, globalisation and the unequal distribution of creative control and financial resources between co-producers influence a co-produced text's thematic content and narrative structure. Ms. Ferris currently lives in San Francisco, where she works as a writer.

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Appendices

Appendix A: Voltron: Legendary Defender extended plot summary

- Season 1 (11 episodes) **Episode one is an hour-long special.* Shiro, after being the Galra's prisoner for one year, crash lands on Earth in a Galra ship and is saved by Keith, Lance, Pidge and Hunk, all of who have been students at the Galaxy Garrison school for space exploration (though Keith was expelled). They find the Blue Lion, which chooses Lance as its pilot and takes them to Arus, where they meet Princess Allura and Coran, the last living Alteans, who were wiped out by Emperor Zarkon of the Galra Empire 10,000 years ago. With Allura's help, they find the other four lions (Red, Green, Yellow and Black) and learn to fly them and form Voltron, a weaponised, humanoid robot that has the potential to stop Zarkon. After overcoming several trials, they are forced to attack Zarkon directly when his soldiers capture Allura. During this battle, Shiro has trouble controlling the Black Lion due to Zarkon's interference, and an unnamed Galra soldier takes down the particle barrier surrounding them, allowing them to escape
- Season 2 (13 episodes) Voltron escapes, but the lions are scattered across the universe in groups of one and two. During this time, Shiro tells Keith that, should anything happen to him, Keith should take over as leader. Once reunited, Team Voltron realize that somehow Zarkon is able to track their location. Shiro begins to recover some memories from his year as a Galra prisoner. This leads the team to Ulaz, the Galra soldier who helped him escape. Ulaz sends them to the Blade of Marmora, a Galra resistance group with whom they form an uneasy alliance. They learn that it was one of the Blades, Thace, who helped them escape the last time they confronted Zarkon. After learning that Zarkon has been tracking them using his connection with the Black Lion, Team Voltron and the Blade of Marmora form a plan to defeat Zarkon. Their plan succeeds in incapacitating Zarkon, but Shiro, in the process of fighting Zarkon (the former paladin of the Black Lion) for mental control of the Black Lion, mysteriously vanishes. Allura also discovers that Haggar is Altean.
- Season 3 (7 episodes) After Shiro's disappearance, the team struggle to regroup. They begin working with the Blade of Marmora and other rebel fighters to form a Rebel Coalition of diverse alien societies. At the same time, Zarkon's half-Galran, half-Altean son, Prince Lotor, assumes contested power in his father's absence. In Shiro's absence, Keith takes on the role of leader and pilots the Black Lion, while Lance switches to the Red Lion and Allura become pilot of the Blue Lion. They discover comet that can

pass through rifts in space-time to alternate realities. They also learn that Voltron was forged from such a comet and that, in another reality they enter, the Alteans, rather than the Galra, were the colonising forces in the universe. Lotor follows them and steals the comet, but they are not able to go after him. Shiro escapes and re-joins this team. Zarkon, having been healed by Haggar's druid magic, reawakens, and the paladins of Voltron learn that Zarkon was the original paladin of the Black Lion.

- Season 4
(6 episodes) Shiro is able to fly the Black Lion after it initially refuses him. This prompts Keith to leave Team Voltron and join the Blade of Marmora to learn more about his Galran heritage. Pidge reunites with her brother, who helps them rally the Rebel Coalition to take part in a plan to take back one third of the Galra Empire. When they carry out the plan, Haggar traps Voltron on Planet Naxzela, which she has turned into a massive bomb. At the last minute, Lotor appears and helps Voltron avert disaster.
- Season 5
(6 episodes) Team Voltron decide to ally with Lotor, who convinces them he is on their side and wants to change the Galra Empire for the better. In the meantime, Shiro begins acting strangely, and it is hinted that Haggar is using her magic to control him from afar. Lotor kills Zarkon, creating a power vacuum in the Galra Empire, which splits into several factions. With the Blade of Marmora, Keith is able to meet his Galran mother, Krolia. Lotor and Allura enter the mystical realm of Oriande, where they are given a test to see if they are worthy of learning the secrets of Altean alchemy. Allura succeeds. Lotor fails.
- Season 6
(7 episodes) Lotor asks Allura to help him build ships from the trans-reality comet that will allow the Galra to harvest quintessence from the quintessence field between realities without needing to take over planets, and he and Allura begin to develop a romance. Krolia and Keith discover that Lotor has been stealing the quintessence of Altean refugees to power his ships. Haggar takes complete control of Shiro, who helps Lotor escape. Haggar reveals that she has also discovered the secrets of Oriande and regained her memories of when she was Honerva, Lotor's mother. Lotor rejects Haggar and escapes with his new mecha that Allura helped create. Keith, piloting the Black Lion, follows Shiro and discovers that he is actually a clone and that the real Shiro's soul has been trapped within the Black Lion's consciousness. Keith returns to Voltron, and they fight Lotor. They enter the quintessence field and trick Lotor into absorbing so much quintessence that he destroys himself. After the fight, Allura uses her new alchemic powers to put the original Shiro's

soul in the clone's body.

Season 7 (13 episodes) Team Voltron learns that, while they were trapped in the quintessence field, 3 years passed. They return to Earth and discover that a faction of the Galra led by Commander Sendak have taken it over. Working with the Galaxy Garrison, they defeat the Galra as well as a mysterious mecha. In the wreckage of the mecha, they find an Altean woman. The season also sees Hunk and Lance reunite with their families, and Shiro learns that his ex-fiancé, Adam, died in the war effort against the Galra.

Appendix B: mecha genre

In the mecha genre (a sub-genre of anime science fiction and action serials), with which *VLD* is closely linked, the line between human and machine is blurred as characters fight using mechanized humanoid armour, often massive in scale (Napier 2005). The tension underlying the mecha genre coalesces around the “contrast between the vulnerable, emotionally complex...human being inside the suit and the awesome power he/she wields vicariously” (Napier 2005, 87). Resulting themes tend to revolve around the nature of humanity and relationships between physicality and the self.

Appendix C: data sample - ideology

Team Voltron

Ideological Position	Evidence (data sample)
All species are equal	<ol style="list-style-type: none">1. S1E3, "Return of the Gladiator": When the Arusians mistake Allura for a goddess, she asks them not to worship her1. S2E6, "The Ark of Taujeer": Team Voltron risk their lives to save the Taujeerians, who resemble maggots without facial features except for round mouths and puffy cheeks, 6 limbs and a tail, robot-like voices and are, physically, very Other1. S2E12, "Best Laid Plans": Allura, apologising to Keith: "I'm so sorry I misjudged you. You've proven it's not what's in your blood. It's who you are that counts."
Diplomacy before violence	<ol style="list-style-type: none">2. S1E10, "Collection and Extraction": Allura reveals that Altean shape-shifting abilities were historically used in diplomatic work1. S3E1, "Changing of the Guard": Coran, at a diplomatic meeting to create coalition of rebels to fight Galra: "We can't always put the fate of the universe in the hands of a giant weapon."2. S3E7, "The Legend Begins": King Alfor of Altea tries several times to reason with Zarkon about trying to close the rift, only resorting to destroying Daibazaal when there are no other options
Ruler serves the people	<ol style="list-style-type: none">1. S1E9, "Crystal Venom": Allura's father, King Alfor, via an AI rendering of his memories: "As leaders, we have to do what's right for our people, even if it means great sacrifice."

	1.	S1E10, "Collection and Extraction": Allura allows herself to be captured by the Galra so that Shiro can escape with important intel
	1.	S3E2, "Red Paladin": Allura is willing to be a paladin because she can't ask others to risk their lives if she doesn't do the same
Freedom strengthens the group	2.	S2E3, "Shiro's Escape": Ulaz chooses to sacrifice himself so that Voltron can escape one of Haggar's monsters
	3.	S6E5, "The Black Paladins": Keith choosing to join the Blade of Marmora leads to character development that makes him a better leader when Shiro can't fight
	4.	S4E2, "Reunion": Pidge choosing to leave temporarily to find her family allows Team Voltron to tell Earth about the Galra
Emotional connections are a strength	5.	S1E1, "The Rise of Voltron": Lions choose paladins based on compatible personalities <ul style="list-style-type: none"> 1. Black Lion: leadership, control (Shiro) 2. Green Lion: curiosity, intellect (Pidge) 3. Yellow Lion: caring, selflessness (Hunk) 4. Red Lion: volatility, instinct (Keith) 5. Blue Lion: empathy, nurturing (Lance)
	6.	S1E2, "Some Assembly Required": The paladins are unable to form Voltron unless they "mind-meld" with each other, which syncs their emotional states to a singular purpose.
	7.	S1E7, "Return to the Balmera": Paladins discover that, in times of need, their lions reveal new individual powers via the psychic connection they share

Life is inherently valuable	1.	S1E7, "Return to the Balmera": The paladins worry about fighting the Galra on the Balmera because they don't want to accidentally injure it.
	1.	S2E4, "Greening the Cube": Keith, in reference to Olkari philosophy: "So, that means we're all related. This ship, those stars, the Olkari. Even the Galra."
	1.	S2E9, "The Belly of the Weblum": Keith, citing their paladin status: "We can't just leave someone to die, even if they are Galra."

Galra Empire

Ideological Position	Evidence (data sample)	
Galra are superior to other species	2.	S1E1, "The Rise of Voltron": Zarkon, referring to Alteans: "I shall wipe that foul race from the universe forever and take back Voltron."
	3.	S1E5, "Tears of the Balmera": Sendak, referring to Earthlings, to Shiro: "Perhaps it would be worth a trip to your planet to see if the rest of your kind have your spirit. Of course, they will all end up broken, just like you. Now that we have Voltron, every planet, every race, all share the same fate."
	4.	S3E1, "Changing of the Guard": Generals complaining about Lotor: "his top generals aren't even pure Galra"
Violence preferred, no compromise	1.	S1E3, "Return of the Gladiator": Zarkon, referring to Sendak: "He fights in the name of Galra. Only success or death will stop him."
	2.	S3E1, "Changing of the Guard": Generals

complaining about Lotor: he allows planets he conquers “to continue to rule themselves”

- | | | |
|--|----|--|
| | 1. | S6E1, “Omega Shield”: Dayak, when teaching Hunk about Galran culture: “Combat is the searing light that burns away imperfections on every level, from personal to societal” |
| People serve the ruler | 1. | S1E1, “The Rise of Voltron”: Commander Sendak, while kneeling before Zarkon: “I fight for the empire. I conquer in the name of Galra...Vrepit sa!” |
| | 1. | S2E1, “Across the Universe”: Haggar, turns Prorok into a robotic monster (robeast) against his will: “I’m giving you the opportunity to serve the Empire.” |
| | 1. | S2E7, “Space Mall”: In astral plain, Shiro and Zarkon battle for control of Black Lion: <ul style="list-style-type: none">1. Zarkon: “Only the powerful can command [the Black Lion].”2. Shiro: “It’s not about power. It’s about earning each other’s trust.”3. Zarkon: “Trust has nothing to do with it. The lion is mine, forever.” |
| Obedience strengthens the group | 2. | S1E7, “Return to the Balmera”: Zarkon is angered when Prorok takes initiative to capture Voltron without first receiving orders, believing that Prorok is seeking his own glory rather than that of the Galra Empire |
| | 1. | S3E6, “Tailing a Comet”: Haggar tortures Throk for losing piece of the teludav to Voltron |
| | 1. | S2E10, “Escape from Beta Traz”: Zarkon kills a druid who points out that he is endangering himself due to quintessence over-exposure and says: |

“Remember who your master is!”

**Emotional
Connections are a
weakness**

1. S1E3, “Return of the Gladiator: Sendak tells his subordinate they will succeed by “exploiting [their] enemy’s weakness”, which is “the worst weakness of all”, valuing the lives of others
2. S1E7: “Return to the Balmera”: The Galra kidnap Shay and use her to lure the paladins into a trap
1. S4E3, “Black Site”: Zarkon tells the Galra that they may kill his son “on sight” with no apparent regret

**Life is valuable in
service to the
Empire**

2. S1E2, “Some Assembly Required”: Haggar uses quintessence to meld prisoners’ spirits with robots to create unnatural “robeasts” loyal to the Empire.
3. S1E5, “Tears of the Balmera”: Galra enslave the Balmerans and extract crystals from the Balmera (a living being the size of a planet on which the Balmerans live) without concern for the creature
4. S1E9, “Crystal Venom”: Sendak to Shiro, referring to his time as a prisoner of the Galra: “We’re connected, you and me. Both part of the Galra Empire... You’ve been broken and reformed. Just look at your hand. It’s the strongest part of you.”

Appendix D: data sample - examples of self-sacrifice

Team Voltron
(paladins, Blade of
Marmora, Rebel
Alliance, Alteans)

5. S1E4, “Fall of the Castle of Lions”: Lance shields Coran with his body during an explosion
6. S1E10, “Collection and Extraction”: Allura allows herself to be captured by the Galra so Shiro can escape with valuable information

7. S2E3, "Shiro's Escape": Ulaz sacrifices his life so Voltron can escape one of Haggar's monsters
8. S2E12, "Best Laid Plans": Thace sacrifices himself so that a plan to defeat Zarkon can be carried out successfully
9. S4E6, "A New Defender": The Rebel Alliance are willing to sacrifice themselves to carry out a plan to defeat Zarkon by distracting Galra ships
10. S4E6, "A New Defender": Keith attempts to sacrifice himself to destroy the shield surrounding Haggar's ship so that she can be defeated
11. S6E1, "Omega Shield": Lance shields Allura from radiation with his lion

- The Galra Empire**
1. S1E3, "Return of the Gladiator": Zarkon, referring to Sendak: "He fights in the name of Galra. Only success or death will stop him."
 2. S2E6, "The Ark of Taujeer": Commander Morvok tricks his crew into remaining behind to die (while he escapes) by appealing to their duty to the Galra Empire: "To die for the Galra Empire is the greatest honour imaginable. Vrepit sa! ("the killing thrust)"
 3. S6E1, "Omega Shield": Galra soldiers debate whether or not honour compels them sacrifice themselves for Lotor in Zarkon's absence
 4. S7E12, "Lion's Pride, Part 1": Sendak fires upon his own fleet and crash lands his ship in a last ditch effort to defeat Voltron

Appendix E: blurred ideological boundaries

S2E8, “The Blade of Marmora”

The Blade of Marmora are a Galran resistance movement that uses spies and guerrilla tactics to undermine the Galra Empire from within. The Blades have character designs and many ideological values in common with the Galra Empire. For example, their uniforms also obscure their features and employ a dark (albeit more blue than purple) colour scheme. Furthermore, they believe in the importance of strength and obedience and are more willing to sacrifice themselves, if necessary, to achieve group goals, albeit without the Galra Empire rhetoric of achieving glory through death. They are less permissive of individual initiative and stress the importance of obedience when carrying out a mission. For this reason, though the Blades and Team Voltron do become allies, they occasionally come into conflict because of different ideologies, an example being Kolivan, the Blades’ leader, being repeatedly frustrated with Keith for ignoring his orders.³¹ However, despite such differences, the Blades reframe the negative connotations associated with Galran culture and blur the lines between what is and is not considered characteristically Galra in their rejection of Zarkon’s dictatorial, master race fascism.



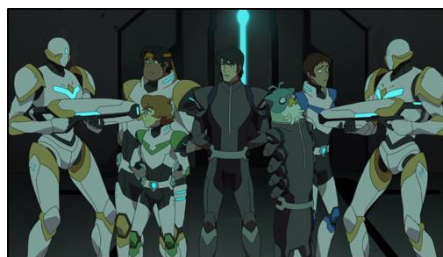
Figure 7: S3E4, “Hole in the Sky”

Nor is Altean ideology necessarily incompatible with evil. Also in Season 3, Team Voltron enter an alternate reality. In this reality, the Alteans won the war against the Galra 10,000 years ago. However, rather than bring about peace, “Empress” Allura instated an imperialist “Altean Empire” that, rather than conquering through physical force, uses an Altean device called a “hoktril” to remove subjects’ free will and make them into “non-cogs” who do the

³¹ S4E1, “Code of Honor”

Empire's bidding. This method of control preserves peace, but subverts supposedly Altean values of freedom, individualism and diplomacy. Furthermore, Team Voltron learns that the Alteans of this reality want to create "trans-reality ships" with a comet made of the same material as Voltron in order to "spread peace and stability to all realities", echoing the Galra Empire's expansionist policies. Visually, the binary between good

Altean and evil Galra is subverted, for, while their tactics are perhaps even more disturbing, their colour scheme remains the chivalrous and pure white, blue and gold. This suggests to the viewer that appearances can be deceiving, a theme echoed later in the season when Lotor's supposedly good intentions are revealed to be in bad faith.



Altean Empire sentries, similar to those used by the Galra Empire, capturing Hunk, Pidge and Lance as well as alternate reality Slav and Sven (Shiro)



An Altean Empire scientist demonstrating how "hoktrils" are used to control subjects

Figure 8

Appendix F: stereotyping in VLD's human protagonists

VLD's three non-white paladins – Shiro, Hunk and Lance – attend the same school, speak with the same American accent and use the same "mainstream" (i.e. middle class, white) teenage vernacular as their teammates. Thus, though the characters are visually diverse, they are culturally homogenous. The only time real-world diversity does play a factor in characterisation is when it is used as a stereotype to create humour, usually at the expense of Hunk or Lance, who are the only paladins with brown skin and, so, would be more likely to face such prejudice outside of fiction. Furthermore, their characterisation muddles the relationship between race, nationality and culture. Shiro, the paladin of the Black Lion, is of Japanese descent, a fact that is not explicitly stated but, rather, implied through the revelation of his full

name, Takashi Shirogane, in S1E5 “Tears of the Balmera” and S7E1, “A Little Adventure”. The name also surfaces in S6E3, “Monsters and Mana”, an episode that plays on character tropes by placing the protagonists in a Dungeons and Dragons-style role playing game. The fictional name Shiro chooses for his RPG character is his actual name. Additionally, the character’s in-game backstory, that of a young disciple seeking revenge for his master’s death, is reminiscent of Japanese samurai films and is animated in a style inspired by manga, Japanese comic strips. Because Shiro’s relationship to Japanese-ness is unclarified and because the context of this episode is one of comedic parody, in which stereotypes are foregrounded, this scene is ambiguous in its treatment of race and culture and might even be read as referentially racist – referential racism being racism in which individuals are expected to embody stereotypical traits of a racial group to which they are linked (Vande Berg 1996).

Additionally, though it is not addressed in the *VLD* narrative, the show runners confirmed that Hunk, the Yellow Lion’s Paladin, is of Samoan descent, and he exhibits features associated with people from Pacific island nations such as brown skin, dark hair and rounded facial features (Cregg 2017). More problematically, Hunk’s weight and preoccupation with food play into stereotypes surrounding Pacific islanders and obesity. Furthermore, as with Shiro, Hunk’s relationship to his assigned heritage (e.g. national or cultural ties, language, etc.) is not clarified.

Lance is Cuban, and his case is unique in that he is the only completely human paladin who addresses his heritage directly. The first instance occurs in S1E4, “Fall of the Castle of Lions,” when he talks about missing his family and Veradero Beach. In S6E2, “Razor’s Edge,” Lance again references his background, saying, “I’m just a boy from Cuba, not a space prince like Lotor” while lamenting his unrequited crush on Allura. This quote suggests that Lance’s low self-esteem, a recurring trait throughout the series, may originate, in part, from internalised prejudice about his heritage. Furthermore, like Hunk, Lance falls victim to stereotypes. Chief among these is his lack of intelligence, flirty “lover boy” behaviour and former experience working on a farm, all being stereotypes attributed to Latino men in the US, where *VLD*’s production is based. Were these traits incorporated into a meaningful character arc that subverts stereotypes and empowers Lance, as is seen with Keith’s Galra heritage, such a characterisation could be used to in a meaningful discussion about representation and identity. However, *VLD* confines such conversation to the “species as a metaphor for race” theme.



What do UK local authorities and schools do that supports the inclusion of refugee and asylum-seeking children in school? A meta-study of literature exploring the perspective of educational professionals

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Abstract

Educational professionals in host countries play a pivotal role in supporting refugee and asylum-seeking children who have been forcibly displaced from their homes. In the UK, experiences of inclusion in school can differ markedly depending on local authority, school context, policies, procedures and discourse. This paper aims to contribute an understanding of how the inclusion of refugee and asylum-seeking children in UK schools is conceptualised and enacted in practice by educational professionals. A qualitative research synthesis of four research articles using a meta-study approach is presented. The methods, findings and theoretical underpinnings of each paper are analysed, with consideration of the socio-political context in which they were generated. The analysis culminates in a construction of a particular understanding of factors that shape the inclusion of refugee and asylum-seeking children in schools. Three themes emerged: how inclusion is conceptualised, how others are valued and how the needs of children are conceptualised.

Key words: inclusion, refugee, asylum-seeker, school, educational psychology

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Introduction

Today, conflict across the globe has displaced over 70.8 million people (UNHCR, 2020). Almost 30 million of these are refugees and asylum-seekers, half of whom are under the age of 18 (UNHCR, 2020). In 2016, the United Nations High Commissioner for Refugees (UNHCR) asserted that the world is facing the biggest refugee and displacement crisis since World War II (Ban, 2016). Whilst the majority of those forcibly displaced tend to flee to neighbouring countries and regions, some seek asylum further afield (UNHCR, 2018b). Regardless of unclear or temporary immigration status, all children have the right to education (e.g. UK Human Rights Act, 1998; The United Nations, 1989). Despite this, forced migration and the marginalised position this group occupies in host societies, has been largely neglected by educational research (Cerna, 2019; Hulusi & Oland, 2010; Pinson & Arnot, 2007).

This article presents the outcomes from a small-scale literature review of qualitative research in the UK which focused on approaches local authorities (LAs) and schools adopt to support the inclusion of refugee and asylum-seeking children (RAS).

Forced displacement – UK context and legislation

Most recent data indicates that in the UK currently are almost 127,000 refugees and 45,250 asylum-seekers with pending applications (UNHCR, 2018b). There is no accurate UK data of the number of RAS children in the education system, rendering them

largely invisible (Cerna, 2019; McIntyre & Hall, 2018) and there remains a lack of central government policy beyond good practice guidelines (DfE, 2004; McIntyre & Hall, 2018; Ofsted, 2003; Rutter, 2006).

UK legislation on forced migration can arguably be viewed as a narrative of exclusion through immigration controls and erosion of social, economic and political rights (Burchardt, 2005; Rutter, 2006). The Nationality, Asylum and Immigration Act 2002, for example, denies the right to work for the duration of an asylum claim, during which time asylum-seekers receive a weekly income one quarter of that required to meet the relative poverty line (Asylum Matters, 2018). Most noticeable in its impact on the education system, however, was the introduction of the Home Office dispersal programme in The Immigration and Asylum Act 1999. The aim of the policy was to reduce cluster areas of refugees and asylum-seekers in South East England but has resulted in uneven geographical distribution of refugees and asylum-seekers in poorer areas of the country (McIntyre & Hall, 2018). In 2017, 174 LAs had no asylum-seekers, whereas 10 LAs were responsible for more than a third of all asylum-seekers; these 10 LAs were in the most economically deprived areas of the UK's North West and Midlands (Lyons & Duncan, 2017).

Behind current UK immigration policies lies what can conceivably be described as an education system built on a performance culture of schooling – high-stakes testing, narrow curriculum, standardised

pedagogical approaches and increased accountability (Sahlberg, 2011). This position assumes that meritocratic education is synonymous with fairness (Brighouse, Howe, & Tooley, 2010). Differences in outcomes between groups of children are accepted and justified because “processes are fair” and there is “equal opportunity”, (Mazzoli Smith, Todd, & Laing, 2018, p. 2). This system is documented to disadvantage minority groups (Eddo-Lodge, 2018; Rushek, 2017).

Integration and inclusion

Dryden-Peterson (2018) makes a distinction between ‘structural’ and ‘relational’ integration of RAS children. Structural integration, sometimes termed “functional integration” (Dryden-Peterson, 2018, p. 10), refers to accessibility of services and institutions, such as education. Policy and practice that structurally include RAS children in education systems (e.g. school admission procedures, exam accreditation) have often been found to overshadow consideration of relational factors supporting their inclusion (Cerna, 2019; Korac, 2003), or their ‘relational’ integration (e.g. individual’s sense of belonging, connectedness). Where the term inclusion is upheld as a “means to remove barriers, improve outcomes and remove discrimination” (Lindsay, 2003, p. 3), integration implies that the onus is on individuals to adapt or negotiate their way into existing systems (op. cit).

Existing research – UK and beyond

RAS children’s lives are

often characterised by complex pre-migration and trans-migration experiences (Madziva & Thondhlana, 2017; Rutter, 2006; Taylor & Sidhu, 2012). However, previous dominance in the literature constructing RAS children as traumatised (Ehnholt & Yule, 2006) has arguably been at the expense of concern with their educational experiences and inclusion in schools. This has also, perhaps, impeded analysis of their post-migration experiences such as poverty, racism and uncertain migration status (Rutter, 2006).

Research has found that early experience in UK schools has a significant impact on how quickly and successfully RAS children settle, with good early experiences of schooling facilitating adaptation to their new life (Hastings, 2012; Hek, 2005; Rutter, 2006).

In the first major research based text on the education of RAS children in the UK, Rutter (2006) identified three discourses dominant in ‘good practice’ literature: welcoming environment, meeting psychosocial needs and meeting language needs. Subsequent Australian research found additional important factors: targeted policy and system support, leadership (which challenges), and working with other agencies to address social, emotional needs (Taylor & Sidhu, 2012). This review sought to illuminate the underlying conceptualisations shaping inclusive values and practice in light of the socio-political context at the time they were written.

Materials and Method

Literature review

The review method adopted is that of a small-scale meta-study

(Paterson, Thorne, Canam, & Jillings, 2001), a method of synthesis incorporating the methodological, theoretical and societal contexts of research findings (Garside, 2008). This allows research to be framed by a socio-political understanding of the position RAS children obtain in the society in which they reside (de Wal Pastoor, 2015; Tikly & Barrett, 2011). There are three components of a meta-study: meta-method (analysis of method), meta-theory (analysis of theory) and meta-data analysis (analysis of findings). These then culminate in synthesis (meta-synthesis: Paterson et al., 2001).

A literature search of published and unpublished research in the UK was undertaken between July and November 2018. The electronic databases searched were Scopus, Education Resource Information Centre (ERIC), the British Education Index, PsycInfo and Web of Science. Databases were searched using a combination of search terms (Table 1) systematically explored, developed from those used in existing literature and consideration of the review question. The first round of searches produced just over 400 results; however, a large number were quickly excluded based on title alone, it being clear they were unrelated to the inclusion of RAS children

The inclusion and exclusion criteria were steadily refined manually throughout the searching process (Table 2). With the addition of each criterion, the number of potential papers reduced until four studies remained which could answer the proposed question:

‘What do UK local authorities and schools do that supports the inclusion of refugee and asylum-seeking children in school?’:

- Supporting refugee and asylum-seeking children: An examination of support structures in schools and the community (Hek & Sales, 2002)
- Local conceptualisations of the education of asylum-seeking and refugee students: From hostile to holistic models (Pinson & Arnot, 2010)
- The education of asylum-seekers: Some UK case studies (Reakes, 2007)
- Welcoming the stranger: A qualitative analysis of teachers' views regarding the integration of refugee pupils into schools in Newcastle-upon-Tyne (Whiteman, 2005).

Findings

Meta-method

The purpose of a meta-method is to determine how research methods have influenced findings and emergent theory in a field (Paterson et al., 2001). Two steps informed the basis of this meta-method: (1) a review of each study's sampling, data generation and data analysis methods, (2) greater consideration of the empirical soundness of the studies, validity and use in the field against the Critical Appraisal Skills Programme (CASP: adapted by Guyatt, Sacklett, & Cook, 1993).

The CASP quality assessment tool highlighted that all studies lacked detail in reporting of the application of their method and

analysis. All studies reported what they termed variably as semi-structured or in-depth interviews though there was little consistency across the studies in how the interviews were reported and therefore, presumably, conducted. Semi-structured interviews in this field may represent what has become expected in our socio-cultural, historical and political context. Individualism inherent in Western social ideology may be in part responsible for the emphasis in the literature on individuals, rather than group, family or community experience (Paterson et al., 2001). The methods researchers chose reflect an ontological position, (i.e. belief about what there is to know), which informs their epistemological position (i.e. how can it be known) and subsequently their methodological options (Grix, 2002). Given that ontological and epistemological assumptions shape research, they have the capacity to influence knowledge, and inform, in this case, the way we conceptualise RAS children and their inclusion.

Meta-theory

Meta-theory's purpose is to analyse the theoretical perspectives driving, or arising from, the studies reviewed (Garside, 2008). Here, the relationship between emerging theory and research and the larger contexts in which theory has been generated are considered, including relating theory to the socio-cultural, historical and political context (Ritzer, 1991). It is important to highlight the most striking initial finding – all the papers were published prior to 2010, suggesting a lack of drive for

research in the area.

Only one study (Pinson & Arnot, 2010) referred explicitly to theoretical frameworks informing their work (discussed below). In research, strong theoretical or conceptual frameworks provide insight into potential new directions for inquiry and help researchers develop existing research in more deliberate ways (Billingsley & Bettini, 2019).

The three studies not explicitly using a theoretical framework (Hek & Sales, 2002, Reakes, 2007, Whiteman, 2005) did not provide definitions of the concepts employed (i.e. inclusion, integration, resettlement). These studies arguably did not have the guidance of an organisational framework for later data interpretation and synthesis (Paterson et al., 2001). In contrast, Arnot and Pinson (2010) detail the difficulties of defining this group of children and their needs, commenting that the use of existing policy language and conceptual frameworks, “define the nature and scope of the ‘problem’, relevant ‘solutions’ and the type of support to offer” (p.254). Arnot and Pinson (2010) suggest the focus of many existing discursive framings in policy (e.g. English as an additional language approach, special educational needs approach, race equality approach) is on the individual child, rather than on value and culture transformation. Though such framings are difficult to capture empirically and often are not mutually exclusive (Rutter, 2006), it is important to recognise the impact they have on the conceptualisation and subsequent inclusion of these children.

It is also necessary that research and theory is considered in light of the macro-context, including public discourses (Ritzer, 1991). Media reporting about refugees and asylum-seekers can influence how researchers frame social experiences, such as racism and nationalism. European surveys have highlighted a rise in negative attitudes and hostility towards refugees from Muslim majority countries, for example (Abdelkader, 2017). Such attitudes are arguably symptomatic of the socially created ideology of 'whiteness', a signifier of privilege and power that maintains inequality (Leonardo, 2007). Despite statements of intent about the importance of race equality and social cohesion,

considers the whole person and assumes that individuals have personal agency and innate motivation towards growth (Maslow, 2013; Rogers, 1959). Pinson and Arnot (2010) suggest three common characteristics present in the LAs applying a holistic approach:

- Valuing cultural diversity
- Constructing new indicators of integration
- Adopting a caring/compassionate ethos and a maximal approach to the role prescribed for the school or LA (p.257).

While the holistic approach may be useful as a tool for examining good educational practices, it is unlikely to offer a strong theoretical framework allowing critical engagement with the impact of forced migration on national educational systems, or the politics which surround it (Pinson and Arnot, 2010). For the purposes

successive UK governments have failed to address the structures that create unequal outcomes for marginalised people (e.g. educational outcomes, Blair, 2008).

Pinson and Arnot (2010) selected three LAs for their case studies which they claim represent the adoption of a "holistic approach" (p.256) regarding the conceptualisation of the needs of RAS children. They describe these LAs and their schools as demonstrating a "strong humanistic child-centred approach" (p.249), drawing on Lewis' (1998) definition of holistic: "concerned with the whole phenomenon and not merely with its parts" (cited in Pinson & Arnot, p.256). Similarly, humanist psychology

of this literature review, since Pinson and Arnot's (2010) approach presented the strongest theory-based research, it was used in the meta-data-analysis as the study against which the findings in the other papers were considered: the Index Theory (Garside, 2008, p.183). The Index Theory is a theory in the primary research reports that is used in the synthesis as the lens through which the other studies are assessed. Where other studies provided "conceptual building blocks" (ibid), these building blocks were analysed to see if they could be located within the Index Theory, or if they offered something distinct from or at odds with it.

Meta-data-analysis

Meta-data-analysis' purpose is to reveal the similarities and the discrepancies in a phenomenon across studies.

This review drew on Noblit and Hare's meta-ethnography, in which

the reviewer re-interprets the conceptual data (themes or concepts) created by the authors of primary studies by translating the studies into one another and synthesising the translation. The themes identified across the studies which were found to relate to the inclusion (variously termed as integration or resettlement, but lacking further detail) of RAS children in schools were:

- Language provision
- LA/school policy or procedure
- Initial assessment
- Multi-agency working or working together
- Peer support
- Resources
- School ethos
- Perception of refugees and asylum-seekers
- Family support

Although not the primary focus of this review, barriers to inclusion identified in more than one study were also recorded:

- Lack of background information
- Precarious circumstances
- Media
- Funding

Discussion

Conceptualisation of inclusion

A single conceptualisation of inclusion (integration or resettlement) was not present across the reviewed studies and little attention was paid to the relationship between integration and inclusion, or underpinning concepts, such as belonging (Wernesjo, 2014). All studies referred to RAS children's place in schools as a right; reference was

The synthesis, or “reciprocal translation” (Noblit & Hare, 1988, p. 38) was achieved by recording how each theme was expressed across the individual studies. Supportive first-order constructs – direct quotes from the studies’ participants that are intended to illustrate their own understandings – were used most often to address concern regarding authors’ choice of language and interpretation.

Table 3 shows the further synthesis of themes into third order concepts – the creation of new meaning from existing constructions (Noblit & Hare, 1988). This was achieved by drawing on concepts Pinson and Arnot (2010) report to have arisen in their study, which drew on holistic theoretical frameworks – “concerned with the whole phenomenon and not merely with its parts” (Lewis, 1998, cited in Pinson & Arnot, p.256); and humanistic theoretical frameworks - considering the whole person and assumes that individuals have personal agency and innate motivation towards personal growth (Rogers, 1959), and acted as an Index Theory to develop the synthesis.

made to national and international legislation, including the UN Convention on the Rights of the Child 1989. This was often coupled with an acknowledgment that difficulties experienced by refugees and asylum-seekers can be exacerbated by existing UK government agendas, including The Immigration and Asylum Act 1999. However, each study demonstrated nuanced differences in their implicit conceptualisations of inclusion, beyond the right to a

place in school. This has been inferred by practical considerations raised, and language used in the studies regarding language provision, school/LA policy and procedure and peer support systems.

Inclusion was discussed implicitly in two principal, but not mutually exclusive, ways: as a holistic approach and as a means of fitting in.

Studies describing refugees and asylum-seekers as “fitting in” with the majority culture (Whiteman, 2005, p. 386) could be more accurately thought of as indicating structural integration rather than inclusion. Studies which discussed refugees and asylum-seekers as having “individual needs” (Hek & Sales, 2002, p. 28) were often more representative of Lindsay’s (2003) definition of inclusion, wherein systems remove barriers to improve a range of outcomes.

Consideration of LA/school position on language provision provides insight into their conceptualisation of inclusion. The emphasis placed on language provision in three studies (Reakes, 2007; Hek & Sales, 2002; Whiteman, 2005) implies the view that proficiency in English is both a means and marker of inclusion (Ager & Strang, 2008). Alternatively, Arnot and Pinson (2010) position proficiency in English language as a facilitator, or means, of social connection, not as marker of inclusion.

RAS children are often still defined by existing approaches and policy language (Rutter, 2006). For example, an English as an additional language (EAL) policy

framework legitimises data collection mainly on refugees’ and asylum-seekers’ competence in English language. The studies which described LAs and schools where policy or procedure was adaptable or bespoke, and recognised the realities of displacement, represent a more holistic conceptualisation of inclusion beyond focus on learning English (Pinson & Arnot, 2010, Hek & Sales, 2002, Reakes, 2007).

How schools managed peer-support systems also offers some insight into their implicit conceptualisations of inclusion. Studies where schools emphasised mixed groupings and extra-curricular activities also referred to “social aspects of integration” (Pinson & Arnot, 2010, p.259), such as whether children felt “safe and secure in school” (p.259).

How others are valued

All studies reviewed captured a human rights perspective of education in some form: education as all children’s basic entitlement. Two studies (Arnot & Pinson, 2010; Hek & Sales, 2002) present LAs and schools with perspectives more in keeping with a social justice view of education (Tikly, 2011). This perspective develops the human rights view and emphasises the “capabilities perspective” (Nussbaum, 2011; Sen, 2009): “...the opportunities that individuals and groups have to realise different ‘functionings’ that they may have reason to value” (Tikly, 2011, p. 9). A social justice view of education adopts a holistic conceptualisation of inclusion and is a position from which all community members are

valued. The review suggests that the value placed on RAS children can be inferred from LA and schools' ethos and their existing perception of refugees and asylum-seekers.

Two studies reported schools that referred to themselves as "multi-cultural" (Reakes, 2007, Pinson & Arnot, 2010). Here, multi-cultural was conceptualised as more than a fact or statistic (having multiple cultures within a school) but rather as an ethos to be promoted and celebrated. An ethos of valuing different cultures is illustrated by LAs/schools taking an active role in promoting different languages and cultures in schools by using maps, art, plays and celebrating religious festivals together (Hek & Sales, 2002, Whiteman, 2005). However, this was found in some schools to be influenced by the existing mix of pupils and current perception of refugees and asylum-seekers (Whiteman, 2005). The inferred assumption was that the more ethnically diverse a school, the more tolerant it was of refugee and asylum-seeking pupils. Though there are examples of times when placing refugees in places that are unfamiliar with other cultures or languages has worked well (Dale, 2014), conversely, sometimes a more diverse population can lead to greater dissonance due to a range of complex social, historical and political factors interacting (Forrest & Dunn, 2007).

Some LAs/schools in the reviewed studies spoke explicitly about instances where RAS children "feel valued" (Hek & Sale, p.29). This position reflects the literature suggesting that when

people feel appreciated and valued, they are more likely to feel that they belong (Due, Riggs, & Augoustinos, 2016).

Conceptualisation of children's needs

Implicit conceptualisations of inclusion and the value placed on all others influence the practical approach LAs/schools take in supporting RAS children. The review suggests that the approach to initial assessment, multi-agency working or working together, resources and family support reflect how the needs of children have been conceptualised.

A whole-child approach has the potential to shift problems and solutions from being perceived as within the individual child to recognising that they occur between people, contexts and systems (Tomm, George, & Wulff, 2014). Taking a whole-child approach is central to a holistic perspective on inclusion and is theoretically underpinned by ecological systems theory which acknowledges the influence of interacting factors (Bronfenbrenner & Morris, 2006; Darling, 2007).

How and why RAS children are assessed is also, arguably, a reflection of LAs/schools' conceptualisation of their needs. Focus on their previous educational experience and academic abilities may shift attention away from some of their social and emotional needs. In some studies, initial assessment was viewed as necessary to ensure the "appropriate stream" (Whiteman, 2005, p. 377), the focus being on testing children's academic abilities in the new setting, a discourse more in

keeping with performance outcome measures and a “fitting in” conceptualisation of inclusion (structural integration). Other studies (Hek & Sales, 2002; Arnot and Pinson, 2010) referred to the importance of knowing about children’s experiences and circumstances, acknowledging explicitly the emotional factors which may affect how they settle and their subsequent learning and inclusion in school.

Studies conceptualising inclusion holistically were inclined to adopt a whole-child approach which took children’s needs beyond school into account, recognising the impact of family circumstances on school functioning, and the importance of engaging in multi-agency working to support families’ needs (Hek & Sales 2002, Arnot & Pinson, 2010). LAs/schools which adopted whole-child approaches reported the importance of positive, supportive relationships with families. In practical terms, this often manifests as access to interpreters and welcoming families to the school community (Hek & Sales, 2002, Whiteman, 2005).

LA/school resources targeting a range of factors beyond academic outcomes were also characteristic of a whole-child approach. An example was the use of an awareness raising film-making project on asylum-seeking issues (Reakes, 2007).

Meta-synthesis – the derived model

Consideration of the reviewed studies’ methods, application of theory and findings has allowed a more detailed

understanding of the ways in which RAS children’s inclusion has been researched, conceptualised and applied in practice in the UK since 2010. Particular patterns emerged: individual semi-structured interviews were the most frequent qualitative method; definitions of terms researched were largely absent; theory or frameworks were generally not explicitly referenced or generated and research on the topic between 2010 and 2018 is scarce.

The findings from this synthesis inform a model aimed to drive education policy and practice in the UK, and potentially further afield. It takes inspiration from Parker’s (2013) adaption of Grix’s research model (2002); underlying beliefs and conceptualisations guide not only research, but practice, too (Figure 1). The model illustrates how conceptualisations of inclusion shape how others are valued, how children’s needs are conceptualised, and how inclusion is manifested in practice.

Refugees and asylum-seekers are at risk of being subject to the complex, cumulative effects of multiple forms of overlapping and intersecting discrimination (e.g. racism, classism). This intersectionality of social and political identities can have an exponential impact in terms of inequality and exclusion (Carbado, Crenshaw, Mays, & Tomlinson, 2013). The ways in which RAS children’s inclusion is conceptualised by educational systems and professionals, therefore, acts as a lens through which to examine their practices (Arnot & Pinson, 2010).

Though humanism was used

within the Index Theory, the human selfhood promoted in theories such as humanism (i.e. self-actualisation) can deter recognition of the detrimental influence of social, cultural and historical context (Martin & McLellan, 2013; Sugarman, 2015): ...as long as we are focused on ourselves, our desires, ends, and pursuits are detached from collective concerns, and the socio-political status quo goes largely unexamined and unquestioned (Sugarman, 2015, p. 113).

In the absence of orientation toward social-cultural contexts and the people within them, the kinds of selves and aspired to human functionings advocated by Western psychology (e.g. self-motivation, self-reliance) can conceivably be viewed as complicit with neo-liberal agendas where a radically free market maximising competition is promoted and social responsibility towards others is diminished (Sugarman, 2015). Consequently, humanism as referred to by Pinson and Arnot (2010) has not been included in the model; instead it is replaced by the transformative paradigm (Mertens, 2005).

The transformative paradigm recognises realities as socially constructed and shaped by political, cultural, economic, racial and social values. From a transformative position, educationalists' role is to recognise society's injustices and inequalities and strive to challenge the status quo (Mertens, 2005). This is achieved by explicitly examining assumptions and addressing power issues and social justice throughout practice and research.

Limitations

It is hoped that the model provides for educational professionals and policy makers a tool with which to reflect and develop conceptualisations of, and practices in, the inclusion of RAS children. This review contributes one potential understanding of the area, aiming to generate further debate, discussion and research.

The studies reviewed were all published before 2010 in the UK, and only four research articles fitted the inclusion criteria.

Although that in itself says something about drive for research in this area, it is acknowledged that the synthesis is limited, and the papers may not reflect current views and practice. Since 2010, centralised governance has increased in the UK alongside a growing focus on controlling (im)migration and measures of attainment in education (Hall, 2018). This has arguably adversely affected the inclusion of RAS children in schools further (Hall, 2018). More research, therefore, is required which focuses on exploring current processes and underpinnings of inclusive practice in LAs and schools.

Implications for UK, education and beyond – the human element

Around the world, children continue to be forcibly displaced (UNHCR, 2020). Despite growing urgency, processes vary and remain unstandardised in the UK (Dryden-Peterson, 2011). Arguably, this is in part a consequence of UK government measures which have limited LA powers, centralised the relationship between the

government and individual schools, and put many public services out to tender, for example, dispersal accommodation for refugees and asylum-seekers (McIntyre & Hall, 2018). Wood and Flinders (2014) argue this power transfer involves: ...not simply the withdrawal of politicians from the direct control of a vast range of functions as the market takes priority, but also a de-politicisation of the debate so that the dispersal of new arrivals becomes seen primarily as a technical and managerial matter (p.156).

Social exclusion is at odds with what many describe as a fundamental human motive and need to belong (Haslam, Rothschild, & Ernst, 2000; Maslow, 2013). If belonging, or inclusion, is central to our experience of being human, then social exclusion is a central aspect of being treated as less than human (Bastian & Haslam, 2010). Collectively, we have a responsibility to mitigate this.

Educational Psychologists can illuminate the psychology underlying inclusion across all the levels they work. This may begin at the individual case level by moving away from standardised normative cognitive assessments as the first course of action, and instead,

cultivate a holistic perspective of children by drawing on consultation skills (Wagner, 2000), and need theories (e.g. Self Determination Theory, Deci & Ryan, 2012; Human Givens, Griffin & Tyrrell, 2013) and dynamic assessment (Feuerstein, 2002). This last originates from Feuerstein's work with children after WWII. Feuerstein's Learning Assessment Propensity Device, for example, rests on the assumption that children's abilities are not fixed and that all children have the ability to progress and overcome obstacles with the right mediation (Clarke & Braun, 2013). These principles can be drawn on when working at the whole school and LA level, too, to create small, but deliberate change (Rees, 2008) towards more inclusive practice.

If we take a holistic perspective on the experiences of RAS children, explicit focus on the role of inclusion in education is crucial, particularly as education is cited as "the most critical element in bridging the gap between relief assistance and durable solutions" (UNHCR, cited in Dryden-Peterson, 2011, p. 83). How we react to RAS children tells us something about our humanity and should encourage reconsideration of how we facilitate our education systems and societies to embrace all.

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Table 1. Key search terms

Key Search Term	Synonyms
Local Authority	Local Government
School	Educat* ¹
School Wide Policies	Whole School Policy School Approach Senior Leadership
Refugee	Asylum Seek* Forced Migrant
Children	Child* Young person Adolescen* Youth
Inclusion	Inclu* Integrat*

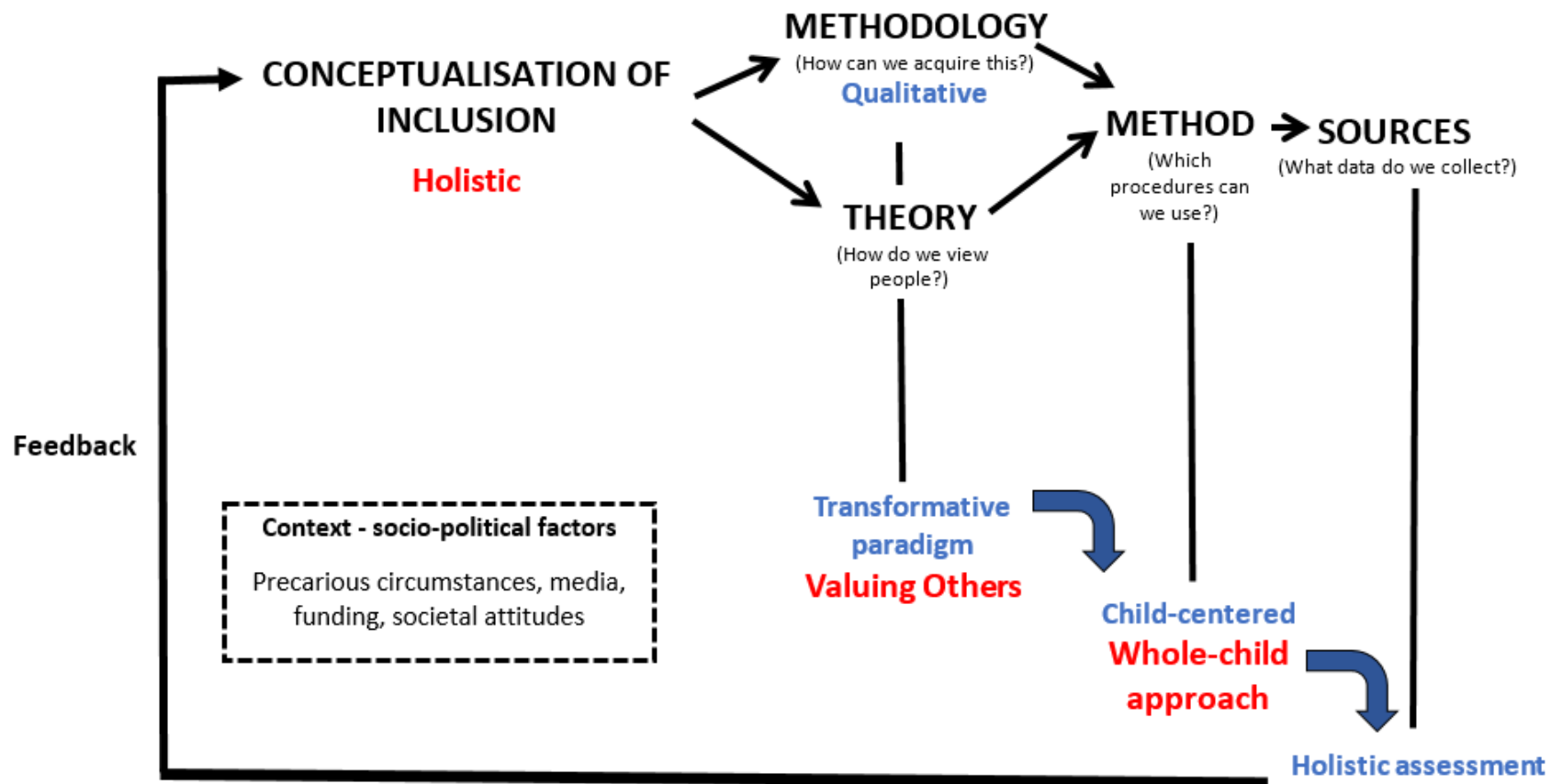
Table 2. Inclusion and exclusion criteria

Criteria	Reasoning
1. Related to inclusion of refugee and asylum- seeking children in schools	Relevance to the research question
2. Undergone quality assurance procedure	Quality
3. Written in English	Accessibility
4. Empirical design, qualitative methodology, exploratory approach	Appropriateness for meta-study
5. Not an evaluation of a specific intervention	Broadened applicability
6. Conducted in UK	Similarity of settings for comparison
7. Published in 2000 or later	Relevance of pertinent UK legislation (Immigration and Asylum Act 1999)
8. Explicitly exploring educational professionals' experience or perspective relating to the inclusion of refugee and asylum-seeking children	Relevance to the research question (refined)

Table 3. Synthesis of themes from studies to form constructions

Themes from reviewed studies	Interpretation (2 nd order concepts) from a single study (Pinson & Arnot, 2010) to explain themes from review	Constructions from the synthesis (3 rd order concepts)
Language provision School/LA policy and procedure Peer support systems	<i>New indicators of integration</i> <i>(1) The social aspects of integration; (2) whether the children feel safe and secure in school; (3) whether their needs are being met so they can fulfil their potential</i>	Conceptualisation of inclusion A holistic approach (inclusion) vs. a means of fitting in (integration)
School ethos Perception of refugees and asylum-seekers	<i>Constructing a positive image and promoting cultural diversity</i>	How others are valued Individuals have inherent value (humanistic approach) vs. some groups are intrinsically different ('othering')
Initial assessment Family support Multi-agency working and working together Resources	<i>A caring ethos and child-centred approach and maximal approach to the role prescribed for school and LA</i>	Conceptualisation of the needs of children Recognising and responding to needs and interactions across environments (whole child-approach) vs. viewing children in isolation (within-child approach)

Figure 9. Framework illustrating a holistic conceptualisation of the inclusion of refugee and asylum-seeking children in school



Adapted from Grix (2002); Parker (2013)



Distinct political communications during Covid-19: Comparative analysis of the British and South Korean governments' communication strategies

Eseul Na

Abstract

It is widely understood that political communication is used to support and defend the interests of those using it. However, during times of crisis, it is necessary for governments in particular to communicate in ways that protect and inform their citizens. This study takes a dialectical relational approach to critical discourse analysis to examine whether the British and South Korean governments have communicated in the interests of their citizens or the social order during the Coronavirus pandemic (Fairclough, 2008). It argues that whilst both governments are situated in liberal democratic capitalist societies, they have taken divergent approaches to communication during this period and interrogates why this is the case.

Key words: COVID-19, CDA, crisis communication, political communication, strategic communication, South Korea, UK

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Introduction

The unprecedented spread of Covid 19 and its high level of risk to human health has demonstrated that the management of pandemics has become one of the most salient issues for global politics (Elbe, 2010; McInnes et al., 2014). In the UK, for example, the government has noted since 2014 that an influenza-type pandemic, such as Covid 19, is a 'tier one' threat to the country (Public Health England, 2014). In these circumstances, government communication takes on enormous significance. Citizens' perception of government's communication during crises is significant for both sides as people can become unwilling to accept the messages from governments and as a consequence, demand changes in governments' crisis communication (Gibb, 1961; Teasdale and Yardley, 2011). Koreans, for example, find government communication using justification and deceptive disgraceful (Kim, 2016). This suggests that the communication strategies are fundamentally dialogical and need to be flexible based on public responses. Furthermore, a clear understanding of governments' behaviours in severe circumstances such as in crisis might be essential to evaluate their competence as a government and by extension, the regime or social order they are seen to represent (Lee, 2008). This study will examine the crisis communication strategies of two liberal democratic

governments during the Covid 19 pandemic, the UK and South Korea. In so doing, it will assess how their strategies differ, the impact of these strategies on pandemic management, and discuss the potential causes of these differences.

Literature Review

Political communication is a relatively new discipline, however, due to the interdisciplinary nature of political communication, it often combines with diverse disciplines such as crisis communication, government communication and public relations (Gastile, 2008; Kaid, 2004). Since politics can be perceived as an engagement in all communication platforms, political behaviours flow through communication (Boynton, 1996). Hence, the messages from political communication can have potentially salient influence in various areas (Soukup, 2014). Graber (1993, p. 305) pointed out the common political communication impact as, "the message has a significant political effect on the thinking, beliefs, and behaviors of individuals, groups, institutions, and whole societies and the environments in which they exist". Thus, this explains the difficulty of constructing one definition of political communication with the consequence that various definitions are broadly accepted (McNair, 2007).

In spite of the lack of one universal definition, however, this study will

employ the viewpoint of political communication from Denton and Kuypers (2007, p. 18), “as public discussion about the allocation of public resources, official authority, official sanctions and social meaning” Their definition encompasses the impacts of government’s communication behaviours. In addition, McNair (2007) points out that most political communications are purposeful in terms of agenda setting and framing in public discourse. This suggests that an acknowledgement of the political intentions in communication will be embedded. Therefore, political communication can go beyond crisis management to encompass crisis exploitation, as the decisions of distribution of information is under a government’s control along with the usage of rhetorical devices and media platforms (Boin et al., 2009). In other words, people are more likely to access information which is selected and framed by the government to accomplish their purpose.

As Deutsch (1963) claimed, the fundamental issue of political communication is the construction of interaction as a government responds and perceives the needs of the public which can be on the edge of controlling and communicating. The significance of measuring the competence of a government with such aspects of the actions, engagement, knowledge and language for a particular situation were applied appropriately should be taken seriously (Ikeda, 2013). Thus,

examining government communication during crises is an effective way to evaluate government competence and ideological purpose. The intense situation brought about by the crisis is more likely to reveal their attitudes of responsibility over severe issues for the society (Lee, 2008).

Crisis communication has no one definition that has been accepted. However, some scholars identified the term ‘crisis’, such as Hermann (1963), as containing threats, time pressure and unpredictability. Seeger, Sellnow and Ulmer (1998, p.233) stated a crisis is “a specific, unexpected, and non routine event or series of events that create high levels of uncertainty and threaten or are perceived to threaten an organization’s high-priority goals”. Yet, Coombs (2007) specified a crisis is sudden threats that paralyse the economy and reputations of the nation as well as harm people’s financial, physical and mental conditions. Although these three accounts have a slightly different focus, they share the understanding that a crisis is an unexpected and uncertain event that creates suffering and damage. Thus, Benson (1988) asserted that crisis communication often links to crisis management for corporations but with the aim expanded to a country and internationally, meaning that, like a corporation, a state should prepare plans and policies for crisis in advance to its outbreak.

Glik’s (2007, p. 34) argues that for government communication to work

it should be “accurate and effective communication to diverse audiences in emergency situations”.

Furthermore, the types of crisis are categorised into intentional crisis; terrorist attacks, poor leadership in management, and unintentional crisis; natural disasters and epidemics depending on whether it was designed to damage others or not (Ulmer et al., 2017). Since crisis communication can impose an effective discourse, the response to the disaster should aim to be appropriate and well-timed to the event while it targets the effectiveness of the outbreak (Paules et al., 2020). This demonstrates the importance of crisis communication by the government due to its responsibility and ability to enable an emergency policy to protect the public.

Essentially, successful government reactions towards crises require well-managed communication which thereby enhance the government’s ability to manage the material aspects of the crisis more efficiently (Houston et al., 2004). As the common understanding of a crisis stated above, uncertainty is one of its characteristics, however, there is a strong tendency in political communication during crises to lessen the significance of the issue in public perceptions as a means of controlling panic (Fessenden-Raden et al., 1987). For example, during the Severe Acute Respiratory Syndrome (SARS) crisis between 2002 and 2003, the Chinese government response lacked transparency and

avoided confronting the issue directly but justified this approach as a way to reduce the unnecessary anxiety for the people (Buus and Olsson, 2006). Disease-based crisis communication can be especially challenging due to uncertainty around the science and the best organisational responses (Lofstedt, 2006). Nevertheless, concealing information can create an atmosphere of dishonesty, which can lead to reduction of the public trust of a government and therefore exacerbate the problems rather than reduce them (Johnson et al., 1994; Braverman, 2003). The SARS case shows that this can have long-term effects on public trust as limited media scrutiny and opaque government communication in Hong Kong diminished public trust for years afterwards (Lee, 2008).

Thus, transparency can be a critical aspect of deciding the success and failure of crisis communication as it establishes the foundation of the judgement for the government and the security of the citizens (Fairbanks et al., 2007). It is for this reason that Adler and Pittle (1984) argue that factual information to the public should be the core message because it allows the citizen to decide their beliefs and actions accordingly instead of a government dictating what and how much the public can cope with. However, as in the China and Hong Kong examples above, this suggestion is not often followed. The US government, for example, has a poor record of transparency during crises, such as

the 9/11 attacks and anthrax crisis in 2001, during which the government sought to propagandise patriotism relating to the 9/11 rather than give precise information (Liu and Horsley, 2007; Hutcheson et al., 2004). Despite the requirement of urgent input of managing anthrax by the government, it was abandoned and the communication focus was solely focused on the September 11 attacks until an NBC employee was infected (Mullin, 2003). For example, D.C., President George W. Bush (2001) made comments after 9 days of 9/11 attacks, “. As long as the United States of America is determined and strong, this will not be an age of terror.....And in our grief and anger we have found our mission and our moment. Freedom and fear are at war.....” Instead of being transparent, the government disregarded the intensive fear from the citizens which led to the public health community receiving high pressure of sharing the information effectively (Seeger, 2005). This once again exemplifies McNair’s (2007) point that political communication, even in crises, has a purpose beyond information-giving.

Fundamentally, governments can shape the perception of a crisis whether it is infectious disease outbreaks or war (Agüero et al., 2011; Berinsky, 2007). There is a tendency for governments to manipulate information in order for them to defend their authority and the status of the wider social order (Jiwani and Krawchenko, 2012). As a consequence, political crisis

communication is more likely to take the form of propaganda and discursive control than the creation of informed citizens (Lilleker, 2006). This occurs not only through conscious discourse construction but through the selection and omission of information and wider levels of transparency, as outlined above. Therefore, the absence of mutual understanding of the messages between a government and the public can lead to dysfunctional crisis communication (Wahlberg and Sjoberg, 2000).

Methodology

This study will be a secondary data analysis of published government briefing scripts and data relating to the Coronavirus from both the UK and South Korea (attached in the appendices). Two analytical approaches will be applied: content analysis (CA) and critical discourse analysis (CDA). The content analysis will focus on recognising repeated themes and word choices as a means of identifying discourses and ideologies that can then be examined using CDA (Wilson, 1993). In order to determine the theme and discourse of the crisis communication, four significant events in both countries were selected as a way of providing snapshots of the crisis communication strategies each government has used.

The CDA will be a synthesis of general CDA analysis examining how discourses are constructed to

maintain social inequalities (Mullet, 2018) and the more particular political focus of dialectical relational CDA developed by Fairclough (2008). Specifically, Fairclough (2008) notes the usefulness of identifying a social problem and interrogating whether particular discourses constructed by elites are necessary for the social order to be maintained (O'Regan and Betzel, 2016). In other words, the dialectical relational approach complements the literature on political communication as it identifies the political purpose of the communication to be essential in

Analysis

South Korean government

The South Korean government deploys Holladay's information giving strategies with the action of instructing (knowledge for protection) and adjusting (updated date accordingly) information. Thus, the analysis will identify what are the contents and context they provided to the public and demonstrate the legitimacy of the hypothesis.

understanding the strategy employed.

In order to conceptualise each government's communication tendencies, this research applies Holladay's (2011) work on crisis communication strategies, specifically the information giving and reputation repair strategies for each government. The two governments' contents (text) involve some of the features from both strategies, yet, the given messages differ greatly.

Firstly, the structure of most briefings indicate a coherent approach to information giving which begins with information of new cases within the nation and arrivals from overseas (if any), and fatalities (An example is below).³²

This organisation of the agenda setting is designed so that the public can comprehend a full picture of the current situation and reduce the potential misinterpretation of data. In

신규 확진자는 6명이고 격리 해제는 51명이 증가하였습니다. 안타깝게도 2명의 사망자가 발생하였습니다. 지역별 현황을 보게 되면 해외 유입이 6명이고 지역 발생은 1건도 없습니다. 최근 2주간 해외 유입이 67.7%를 차지하고 있습니다. 어제 신규로 확인된 해외 유입 환자는 6명입니다.

The number of new confirmed cases increased by 6 and quarantine clearance increased by 51. If you look at the current situation by region, there are 6 foreign inflows and no local outbreak. Over the past two weeks, overseas inflows accounted for 67.7%. Yesterday, there were six newly identified overseas patients.

addition, the government provides the knowledge of Covid-19² such as “비말 감염” (Droplet infection) and “바이러스 유전자” (Virus genes).

The information given is specific and detailed, enabling citizens to understand the impact of the virus on their society, rather than providing abstract statistics that are detached from their necessary context. Thus, the government’s information giving strategies appear to deliver a mutual comprehension of the crisis situation throughout the country. Since the provision of information by authorities is the dominant way of perceiving the disease (Berkinsky, 2007), introducing the basic

understanding of the infectious route and the character of the virus can encourage people to actively engage

in ³³the process of controlling the epidemic situation. Secondly, there is a consistent emphasis on “개인방역 5대 기본 수칙”

(Personal hygiene 5 Basic Tips) and “마스크 착용” (Wearing face masks).

These clear and coherent instructions create a systematic understanding of the salience of individual action within the context of the crisis. Hence, what to do in the current circumstances is delivered clearly in which there is a limited chance of confusion about individual behaviour. The repetition of these behavioural tips in every briefing consistently underlines their importance. Therefore, following the new rules of social behaviour during the pandemic becomes easier for the public, which creates confidence and comfort despite the significance of the situation.

Lastly, the government’s information giving strategy provides continuous

¹ See Appendix A ² See Appendix B ³ See Appendix C

updates about the issues related to coronavirus⁴, for example, “신천지” (Shincheonji Cult), “마스크 수급” (Mask Supply), “이태원 클럽” (Itaewon Club) and “개인 정보 공개” (Personal Information Disclosure). This communication behaviour indicates the main vectors of the virus’ spread but also implies that the government is monitoring these issues carefully. This approach shows consideration of the public’s concerns for their physical and mental health and constructs the image of the virus as something that can be attenuated by careful government management. Through providing regular updates about earlier crisis moments, such as around outbreaks caused by the groups and individuals mentioned above, the government is able to calm public anxiety. Moreover, the government frames itself as a competent handler of a volatile situation.

Although the Korean government’s reputation benefits from some of this framing, it is nonetheless the case that this is a thorough information giving approach to communication that treats Korean citizens as capable and intelligent agents in preventing the spread of the pandemic. The government presents information transparently and fully and by repeating key hygiene messages, it is able to develop a collaborative relationship with its citizens. However, by analysing

some of the key issues during the crisis in more detail, the agenda-setting power of the government’s communication is also apparent.

Firstly, in the beginning phase of the virus outbreaks, which were primarily spread by “신천지” (Shincheonji Cult), the government focused on updating the public with information about the infection rates among the branches of the church and particular cities where the cult has caused outbreaks, such as the percentage of their contribution to the total confirmed cases and the implement of mass quarantine of the contacts (K.Government, 2020a). This created positive and negative discourses for the public. The beneficial part indicates that the government is confident with managing the outbreaks and the involved people recognise the importance of them participating in this process of controlling the virus. This once again exemplifies the government’s competence discourse. However, it also provoked an ‘enemy within’ discourse targeting “신천지” (Shincheonji Cult) as the crisis situation and the security in the nation has got declined. However, this was not done explicitly through negative rhetorical devices relating to the cult that emphasised blame. Instead, it was the agenda-setting itself that could shape public attitudes as the cult were identified with the virus (Kim, 2020a). In this case, with approximately 80% of cases at the

⁴ see Appendix D

time linked to the cult, and where cult members systematically and deliberately contravened the government's hygiene advice, the personification of the cult with the virus was perhaps warranted (Kim, 2020a).

However, the focus on specific 'villains' also had some dangerous essentializing effects on other groups, most notably the Korean LGBT community. In the "이태원 클럽" (Iteawon Club) in Seoul's gay district, which was reported indirectly in the government's briefings, LGBT people feared public 'outing' of their sexuality and experienced a backlash on social media (Kim, 2020b). In this case, where the sexuality of the vector was irrelevant with no wider correlation between sexuality and the ignoral of government guidelines, the government's highly transparent communication ran the risk of putting some of its vulnerable citizens in danger.

The government recognised the potential discrimination against certain groups (e.g., cult or sexuality) due to the given information and attempted to allay these fears by emphasising social solidarity and enhancing the security of personal information for the contacts (K.Government, 2020b). Hence, they reassured the "개인 정보 공개" (Personal Information Disclosure) is under control and would not be abused as they state the range of information they use with the 14 days period of the data to be kept and the

plan to remove the previous data with a specific date (K.Government, 2020c).

Thus, whilst the transparent and detailed approach to information giving exercised by the Korean government has led to the potential for discriminatory discourses to emerge, these have not originated with the government itself. There is no scapegoating discourse present even in moments of crises. In its transparency about its personal data management, the Korean government again emphasised a discourse of trustworthiness and competence. There are clear expectations for citizens but also for the government itself. This aids in managing the conflict and anxiety in the public and leads to higher acceptance of information by the communicators (Gibb, 1961).

The consistency of the government's full and transparent communication strategies was further exemplified in responding to concerns about "마스크 수급" (face mask supply). In this instance, the government again provided thorough factual information about the issue, including the process of manufacturing the face masks and the amount of supply to particular shops in different regions for enabling the public to purchase it (K.Government, 2020d). The information-focused government communication is able to address public concerns effectively and embeds a 'competence' discourse in the public understanding of its

response to the pandemic. The government's communication takes citizens' health and safety seriously and deals with it directly. In addition, the government's direct but informative communication enables citizens to be active agents in pandemic prevention. Thus, alongside competence, the government's communication strategy has emphasised cooperation with the citizenry. Information giving strategies like this promote mutual trust and benefits by publishing the situational and evidential data.

In taking this approach, the Korean government has potentially learned from the mistakes of its predecessors. The current crisis communication during the Covid-19 pandemic by the Korean government seems more singularly impressive for the citizens because two previous governments applied reputation repair communication to handle the emergencies such as the Ferry Sewol disaster and MERS (see Kim, 2017; Power, 2015). Due to the experience of both directions of communication strategies by authorities in a relatively short period, it is understandable why the current government attempts to be transparent with information and that it is accepted positively by the public.

British Government

In contrast to information-giving, the British government utilises

Holladay's (2011) reputation repair strategies, specifically to diminish (minimisation, excuse, justification), deny (denial, suffering), rebuild (rectification, repentance, compensation) and reinforce (bolstering, transcendence, ingratiation) throughout their communication.

Firstly, on the day of announcing the UK lockdown, the Prime Minister (PM), Boris Johnson, one of his first acts to diminish government responsibility was to state that "other countries [were suffering from the pandemic] that also have fantastic health care systems, that is the moment of real danger."⁵ By choosing the words "also" and "fantastic", he reinforces the idea that the UK has a fantastic health care system and other countries can be the evidence for the disease outbreak in the country to diminish the responsibility of the government if their management was ineffective. However, learning from other countries' experiences is then rejected and instead the British approach should be "right for the British people... at the right time for this country."⁶ Thus, Johnson attempted to diminish government responsibility through international comparison in the first example but then rejected the salience of international comparisons in the second, instead emphasising a discourse of British exceptionalism. Moreover, this exceptionalism suggests that "right" can have multiple meanings, rather than

⁵ see Appendix E

⁶ see Appendix F

simply protecting public health above all other concerns. Government briefings consistently failed to clearly explain the reasons for government decisions or their future plans to manage the pandemic and instead relied on the construction of an exceptionalist discourse playing on Britain's great institutions, such as the 'fantastic' NHS mentioned above.

The agenda-setting behaviour occurred frequently, such as claiming "there is no risk of a second peak"⁷, despite there being no evidence to suggest that this would not occur. Rather than focusing on factual information, the government used hopeful, unevidenced statements that cannot be easily assessed by the public. This is deceptive to the public because it sends a cue that the crisis is easily manageable and is coming to an end, thereby influencing public behaviour in ways that will actually amplify the spread of Covid-19. This was coupled with earlier messages about the necessity of a full and strict lockdown, resulting in an ambiguous and confusing narrative that reduces citizens' agency and results in greater social harm (Berinsky, 2007).

Indeed, inconsistent, and unexplained health advice, was a feature of the UK government's communication strategy. During the lockdown, the government modified some rules⁸, for example, from 2 metres to "1 metre plus" distance and "meet with one other household

at a time. This can be indoor or outside..... For meeting outdoors, drawn from six different households." This information is located in the same paragraph which is inconsistent and misleading. In reducing the social distance level, the government signalled that the harm of the outbreak was being limited despite many deaths each day. More significantly for defending its reputation, these confusing messages result in responsibility for preventing the spread of the virus being passed on to the public. In essence, this ambiguity sets the citizens up to fail but allows the government deniability because the guidance has technically been provided. Indeed, government ministers were regularly tripped up on their own rules in interviews, often contradicting each other and their own guidelines (BBC News, 2020). Despite this, the government has never explicitly recognised either misinformation or disinformation in any direction afterwards but has instead continued to convey information in this style, suggesting that the ambiguity is deliberate.

The appearance of clear communication was evident in the most noticeable slogan of the British government delivered throughout their communication: "protect the NHS."⁹ At first, the thought of preventing the collapse of the healthcare system seems reasonable, however, the slogan exists as the main aim for the whole

⁷ see Appendix G

⁸ see Appendix H

⁹ see Appendix I

country to guard while the citizens are not emphasised by the government to be protected. The NHS is there to help the public, not for the public to protect the NHS. If the latter is necessary, it indicates a failure in wider government pandemic management or in funding for the NHS. Here though, one of the most popular British institutions is used to cover the government's enormous failure to protect vulnerable people in care homes (Smith, 2018).

Furthermore, another reason for the need to 'protect the NHS' was the government's failure to provide adequate levels of PPE (Guardian, 2020). When this issue was addressed, the answer from the authorities was "we have enough PPE and (want) to make sure it gets to the right people."¹⁰ This language frames the competence of the British government as they confidently state their planned action. Yet, this statement is again focused on reputational repair rather than addressing the problem directly. The problem was not distribution but quantity caused by poor government planning (Financial Times, 2020). The British public were not provided with accurate information about the problem and how it would be addressed but instead were treated to government denials that a problem existed at all. Information giving and public health were both sacrificed to protect the government's reputation.

This was most notable during the Dominic Cummings controversy, where the PM's special adviser was spotted breaking lockdown and driving hundreds of miles to stay with his parents. Although it was widely recognised that he had broken lockdown rules, the PM officially defended Dominic Cummings' violation on the grounds that anyone would have done the same thing and he acted "responsibly, legally and with integrity" (B.Government, 2020c). Moreover, the PM asserted the public received excessive information to cope and should not be distracted from the Dominic Cummings' matter. This hypocrisy demonstrated how the government's health advice was always contingent rather than clear and that official legal rules apply differently depending on the subject. From the perspective of pandemic management, this also signalled to the British public that breaking the lockdown was acceptable if you felt it was necessary according to your own personal morality, thereby undermining the efforts that had been taken to that point.

However, these problems have been noticed by the public. A recent study found that confusing government messages have been the biggest concern among the public (Cushion et al., 2020). Therefore, looking at how the communication was operated during the lockdown can potentially identify the government's purpose behind their messaging. The government introduced the

¹⁰ see Appendix J

lockdown with a range of violent rhetorical devices to the public as due to the vicious disease, the lockdown had to be the new policy to be deployed in order to fight the “invisible killer” (B. Government, 2020a). This discourse played into narratives of a national struggle and evoked popular memories of wartime resilience. However, during this period there were 331 deaths within 18 days (Worldometer, 2020) and the message from the government was focused on metaphor rather than factual information about how the lockdown would function and why. The absence of clear guidance and justification was concealed by rhetorical devices and storytelling that incorporated the public into a national effort that prohibited strong demands for more detailed data and examination of government behaviour (Gross, 2008).

This is therefore an example of how a discourse is used to present the image of government action and competence whilst concealing its actual deficiencies in both action and communication. There was very brief information about PPE availability, the locations of worst virus outbreaks, testing levels and availability. The public’s ability to be active agents was thereby limited to a fantasy engagement with popular memory and cultural institutions like the NHS.

This was well illustrated by the government’s adoption and encouragement of clapping for key workers each week and for the NHS’s 72nd birthday while casually

stating “acting responsibly” and “Let’s stay alert” (B. Government, 2020b). Whilst healthcare workers were dying from a lack of PPE (Financial Times, 2020; Guardian, 2020), the government was encouraging symbolic gestures. These deaths were neglected in the briefing because it contradicted their slogan of protecting the NHS, even as the UK has the second highest death toll of health workers, 540, in the world, which is believed to be the consequence of the failure of supplying the adequate PPE with the right amount and at the right time (Mckay, 2020). Fundamentally, the focus on national symbols rather than citizens seems to have been a way of minimising the crisis and pacifying public discourse with the outcome of creating a perplexed public with little agency.

However, where the government’s messaging is consistent is in emphasising their gratitude towards businesses for manufacturing PPE and its essential role for society (B. Government, 2020d; 2020e). Furthermore, the PM asserted that operating retail shops will proceed to the national recovery from the crisis (B. Government, 2020f). It may not be possible to rule out the economy, however, considering the over 100 daily deaths in the country, praising the capitalist values indicates the government motives in their communication. Even when the fatalities declined, a high number of new daily cases persistently occurred which is over 500 (Worldometer, 2020) at the time of

encouraging people to “eat out to help out” (B. Government, 2020g). Thus, the government implicitly with language and explicitly with policies endangered the citizens for their benefits to sustain the powerful status alongside the good maintenance of the capitalist social order.

Overall, the British government’s communication strategies has exhibited all the characteristics of reputation repair strategies as they use their authority power to deny their responsibility for policy failures, justify the high death toll, and diminish the scope of criticism by engaging the public in national interest discourses and symbolic collectively, whilst refusing to provide clear and detailed guidance and information.

Discussion

Despite having very similar positions as liberal democratic capitalist societies, the crisis communication strategies used by the South Korean and the UK governments during the coronavirus pandemic were very distinct. The critical difference was the level of transparency in the governments’ messages to the public and the level of detailed information the public received, both of which are recognised means of measuring successful democracies (Fairbanks et al., 2007). The Korean government has consistently delivered factual information about the pandemic and social situation, for example, presenting the detailed

data of the confirmed cases and fatalities, including their locations. Furthermore, the citizens were informed about the routes of virus transmission, the variations in the virus, and the salience of preventative measures, such as wearing face masks. By contrast, the British government shared information sparingly and explained the need for mitigating behaviours through ambiguous language and more symbolic discourses, such as references to ‘war’ and popular institutions like the NHS. Messages were conveyed through storytelling and a range of rhetorical devices that resulted in public confusion about appropriate behaviours and seemed instead to be designed to defend government incompetence. Indeed, the UK government’s failures around PPE and other preparations may have meant that the Korean government’s more transparent approach was impossible whilst still maintaining the social order.

Their practical incompetence was also reflected in their ambiguous and rarely evidenced guidance. The instructions caused confusion in the public discourse, for example, the 2 metres to the “1 plus meter” distance, adjective “right”, “2 households..... 6 household” gathering and “stay alert”. None of them presented any scientific evidence or further accounts to enhance the public’s comprehension to act appropriately. The government advice itself was very confusing and therefore hard to follow. This communication strategy seems to

have been built on the belief that the public have a limited ability to cope with massive information, meaning that the government must handle it for them. However, this was not the case in South Korea, where public engagement with government advice seems to have been much stronger despite a considerably higher level of detail.

The British government has shown little interest in building a mutual trust between the government and the public, despite the Korean case, and previous studies, indicating that more informed citizens are able to act intelligently and independently when given the opportunity (Adler and Pittle 1984). Therefore, it is clear that the British government exhibited the social problem noted in wider literature that governments can tend to use defensive communication strategies that protect themselves and the social order rather than their citizens. This was perhaps most apparent in how the British government has been emphatic in its rhetorical support of businesses throughout the pandemic and the theme of needing to balance economic cost against human life. Although the Korean government also used policies to protect the national economy, its communicative discourses were strongly focused on health rather than the economic cost. Therefore, the British government's reputation repair communication of eliminating the core aspect, transparency of sharing information with the public was an unnecessary decision (Fairbanks et al., 2007).

However, it should be noted that the crisis communication by the Korean government in this case is significantly different from the past two governments, in which a more defensive strategy resulted in wide public distrust of the political system. In both the MERS crisis and Sewol Ferry disaster, government communication helped to spark public protests when it was discovered that the government had deceived the public in ways that endangered citizens (Kim, N., 2017; Chae et al., 2018; Kang et al., 2018). In both of these cases, the Korean government took a more British approach to communication by concealing details and attempting to cover its incompetence (Power, 2015). The resultant protests were so powerful that in the latter case they were integral in the impeachment of the then president (Kim, N., 2017).

Therefore, this defensive strategy in Korea had massively weakened the social order and led to a demanding and engaged public expecting transparency from the government, especially when the information is critical in crisis circumstances (Liu and Horsely, 2007; Lee, 2008). Thus, the information giving communication strategies by the current Korean government have been affected by the former social-political crises and articulate the role of governments is to protect the citizens' lives over other elements. Indeed, the varying communication strategies may therefore both be seen as defending the social order

but in distinct political and cultural circumstances.

One way of measuring the public perception of the government's performance is through opinion polling (and elections in the Korean case). In the National Assembly election, the Korean government was able to prevent a single case of the virus emerging from over 30 million in-person voters, who were informed to wear gloves, face masks and stand at marked spots (Kang, 2020). At 66.2%, this was the second highest turnout in history and the governing party won an absolute victory of the National Assembly election, 180 out of 300 seats, thereby demonstrating Korean perceptions that the government had handled the situation very well (Shin, 2020). Subsequently, a Pew Research Center (2020) poll found that 86% of Korean respondents believed that the government had handled the situation well, which was a large rise from an earlier poll in February, at the start of the crisis, which showed that 53.8% Koreans were satisfied with the government handling (쿠키뉴스, 2020).

These data illustrate how the Korean public have seemingly increasingly valued their government's response, of which their communication strategy is an essential component. By contrast, the British public's perception about the government's handling of the pandemic has declined significantly. In March, YouGov (2020) found that 72% of the public felt positively towards the

government and its handling but by the Pew Research Center (2020) poll in August, that had dropped dramatically to 46%. Coupled with data suggesting that their major concern has been with confusing government communication (Cushion et al., 2020), these points indicate that the British strategy may only be temporarily effective in defending the social order and the authority of the governing party.

Conclusion

This study has used a dialectical relational approach to CDA to argue that manipulative government communication is a major social problem. Governments often pursue reputational repair rather than information giving approaches that damage democratic engagement and endanger citizens in moments of crisis. To assess this, it analysed the differing communication approaches of the Korean and UK governments during the Coronavirus pandemic. In so doing, it has asserted that transparent government communication during a crisis is possible and is far better at protecting citizens than the alternative (Coombs, 2007). The Korean approach of information giving has resulted in a more participatory public and far lower levels of transmission and mortality. By contrast, the UK government's communication strategy has been to defend itself through appealing to popular discourses but fundamentally disempowering and

confusing its citizens. Moreover, the latest polling data suggests that the social order is more effectively maintained by the information giving approach, albeit with a more empowered citizenry, than the defensive strategy, which has failed previously in Korea as well. Thus, it is not necessarily the case that the UK government's strategy is required to defend the social order and their incompetence may eventually weaken it.

Due to the limitations of space and the ongoing pandemic situation, this study has been necessarily selective in its approach, particularly in terms of considering the fourth stage of Fairclough's (2008) dialectical relational approach, considering opposing discourses. Therefore, this study could be developed further by examining counter-narratives to both government's information and discourses, specifically in traditional and new media platforms.

Notes on Contributor

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Appendices

Appendix A: The organisation of the briefing structure.

신규 확진자는 6명이고 격리 해제는 51명이 증가하였습니다. 안타깝게도 2명의 사망자가 발생하였습니다. 지역별 현황을 보게 되면 해외 유입이 6명이고 지역 발생은 1건도 없습니다. 최근 2주간 해외 유입이 67.7%를 차지하고 있습니다. 어제 신규로 확인된 해외 유입 환자는 6명입니다.

The number of new confirmed cases increased by 6 and quarantine clearance increased by 51. If you look at the current situation by region, there are 6 foreign inflows and no local outbreak. Over the past two weeks, overseas inflows accounted for 67.7%. Yesterday, there were six newly identified overseas patients.

(Extract from Government Briefing on 2 May 2020. A full transcript of this document is available at: https://www.ytn.co.kr/pn/0301_202005021410005930).

Appendix B: The knowledge of Covid-19

Appendix B-a: “비말 감염” (Droplet infection)

(Extract from Government Briefing on 11 May 2020. A full transcript of

Appendix C: The consistent emphasis. “개인방역 5대 기본 수칙”

this

document is available at: https://www.ytn.co.kr/pn/0301_202005111412263791).

Appendix B-b: “바이러스 유전자” (Virus genes)

(Extract from Government Briefing on 22 May 2020. A full transcript of this document is available at:

https://www.ytn.co.kr/pn/0301_202005221411240546)

(Personal hygiene 5 Basic Tips).

1. 아프면 3~4일 집에 머물기
(If you are sick, stay at home for 3-4 days)
2. 건강한 거리두기
(Keep a safe distance)
3. 손씻기, 기침예절 |
(Wash your hands, coughing etiquette)
4. 매일 2번 이상의 환기와 주기적인 소독
(Ventilate more than 2 times a day and disinfect regularly)
5. 거리는 멀어져도 마음은 가까이
(We are still connected despite the physical distance)

Extract from Government Briefing on 8 May 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202005081414293015)

Appendix D: continuous updating the crises related to coronavirus Appendix D-a: “신천지” (Shincheonji cult)

(Extract from Government Briefing on 23 February 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202002231342497454 And

Extract from Government Briefing on 24 February 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202002241409579174)

Appendix D-b: “마스크 수급” (Mask Supply)

(Extract from Government Briefing on 7 February 2020. A full transcript of this

document is available at: https://www.ytn.co.kr/_pn/0301_202002071102451741 And Extract from Government Briefing on 2 March 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202003021103007044).

Appendix D-c: “이태원 클럽” (Itaewon Club)

(Extract from Government Briefing on 8 May 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202005081414293015 And Extract from Government Briefing on 22 May 2020. A full transcript of this document is available at: https://www.ytn.co.kr/_pn/0301_202005221411240546).

Appendix D-d: “개인 정보 공개” (Personal Information Disclosure)

(Extract from Government Briefing on 8 May 2020. A full transcript of this

document is available at:
https://www.ytn.co.kr/_pn/0301_202005021410005930 And

Extract from Government Briefing on 10 June 2020. A full transcript of this document is available at:
https://www.ytn.co.kr/_pn/0301_202006101102045337).

Appendix E: Diminishing responsibility
“other countries that also have fantastic health care systems, that is the moment of real danger” (Extract from the British Government Briefing on 23 March 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/pm-address-to-the-nation-on-coronavirus-23-march-2020>)

Appendix F: Lessons from outside of the UK “right for the British people... at the right time for this country” (Extract from the British Government Briefing on 16 April 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/foreign-secretarys-statement-on-coronavirus-covid-19-16-april-2020>)

Appendix G: Claiming no second peak
“there is no risk of a second peak.” (Extract from the British Government Briefing on 20 April 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/health-and-social-care-secretarys-statement-on-coronavirus-covid-19-21-april-2020>)

Appendix H: modified some rules “1 metre plus” and “meet with one other household at a time. This can be indoor or outside..... for meeting outdoors, drawn from six different households.”

(Extract from the British Government Briefing on 23 June 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/pm-address-to-the-nation-on-coronavirus-23-march-2020>)

Appendix I: the most noticeable slogan
“Protect our NHS” (Extract from the British Government Briefing on 6 April 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/foreign-secretarys-statement-on-coronavirus-covid-19-6-april-2020>)

Appendix J: the problem of PPE “we have enough PPE and (want) to make sure it gets to the right people” (Extract from the British Government Briefing on 10 April 2020. A full transcript of this document is available at:
<https://www.gov.uk/government/speeches/health-and-social-care-secretarys-statement-on-coronavirus-covid-19-10-april-2020>)



‘The Get Away Car’: Multimodal Discourse Analysis of a Volvo TV Advertisement

Kleopatra Sideridou

Abstract

The genre of adverts usually employs many multimodal recourses to convince the consumer and convey a message. In this case study, a Volvo television advertisement is divided into sections and analyzed frame by frame. Using multimodal discourse analysis, it is revealed how a young female’s story is constructed to promote the product. Various artefacts, visual contrasts as well as the role of nature appearing on screen, unfold the protagonist’s lifestyle and the transition she is experiencing. Overall, the study is another example of how multimodal discourse succeeds in making use of several modes to create a satisfactory and complete meaning.

Keywords: *car advertising, multimodal discourse analysis, visual modes, nature, juxtaposing*

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1. Introduction

Various genres of discourse have concrete characteristics and employ a plethora of strategies to pursue specific goals. According to Cook (1992, in Najafian & Ketabi, 2011), what distinguishes advertising discourse from other types is its persuasive agenda. Ads aim to affect the consumers' intentions, bring forward or create new needs, make relevant specific social values and construct life models (Fomukong, 2016). Including radio, TV, posters and written advertisements, over the years the marketing industries have perfected their strategies so that the conveyed messages are subliminal and implicit, yet intense. Also, given the fact that in this particular genre the communication is nonreciprocal, the advertisers need to build strong engagement with the potential target audience (ibid). This, on a first level, is implemented by capturing the full attention of the consumers who try to decode the communicated information (Rocci 2008 in Rocci et al., 2013). The more complex the idea, the more effort is required by the viewer. On the next level, as Jeong (2008 in Feng & Wignell, 2011: 584) argues, "the meaning [...] is not imposed on the viewer, but is constructed or inferred by them" which is much more effective in terms of promotion.

In advertisements, visual designs have the power to reflect indirectly numerous ideals, concepts and viewpoints through construing a new reality serving the

intended outcomes (Chen, 2016). After all, an image is worth a thousand words. According to O'Halloran (2004), in advertisements, the procedure of selections starts when deciding what and how to film in a set. The capture of a shot/ frame constitutes the basis upon which the transcription and analysis will be developed. This paper identifies and analyses some of the core semiotic resources and rules that a Volvo TV advertisement uses to attract potential buyers. In the next section, some of the central concepts usually employed in the genre of advertisements in general, and automobile commercials in particular, will be discussed. Subsequently, the key concepts of the methodology will be introduced. The following sections consist of a more specific description and comprehensive analysis of the data. In the last part of the paper, the main points which were examined will be evaluated with references to the relevant literature.

2. Literature Review

Usually, an advertisement as it unfolds can be divided into three sections. These are "the narrative stage", "the propaganda stage" and "the logo stage" (Feng & Wignell, 2011: 567). This structure is not absolute and might not always be clear-cut (ibid). Nevertheless, most times the commercial displays a story that later somehow relates to the product being promoted. Apart from this function, the construction of a narrative engages with the audience and allows them to identify

with situations and characters of this social reality (Feng & Wignell, 2011). Moreover, another mode that is included in the advertisement is a narrator, a song, or both of them. They are treated as significant components of meaning-making as they shape the viewer's mood and create a particular attitude towards the presented events, relationships, and consequently the product (O'Halloran, 2004).

One of the main thematics of advertisements is the shift of a situation with a direct or indirect reference to the product. This shift becomes apparent either by the characters whose initial emotional state changes as an effect of using the product (Feng & Wignell, 2011), or by demonstrating an overall change of phase that they go through and the product is the key point of that transition. Thibault (2000) argues that contrasts and juxtaposing are used to emphasize and reinforce the viewers' attention and turn to meaning-making. In addition to that, O'Halloran (2004) bases the analysis of an automobile commercial on this theory.

In the automotive advertising industry, juxtapositions are adopted as a common practice regarding city life compared to natural life. The role of nature has been highlighted in numerous advertisements of cars as a symbol of unspoiled purity and ultimate serenity (Garland, et al., 2013). The car is usually the mean that brings humans closer to their natural environment and restores the harmony between them (ibid; Budinsky & Bryant, 2013; Chen, 2016). In this way, this product is presented as a pivotal commodity

that is necessary for every person who wants to be released from the constraints of their everyday suppressing routine and embrace the wild minimalistic but more meaningful physical environment. These sceneries are very mesmerizing and different from the urban setting that the audience is living in, so the vehicle that promises this (virtual) escape and adventurous experience is suddenly desired. It becomes a symbol of freedom, power and happiness (ibid; Li, 2013)). As far as Western contexts are concerned, Gunster (2004; 2007) comments on the popularity of depicting appealing images of the environment in order to relate the very famous slogan of "getting away" with the ownership of a private car. Speed and mobility which sometimes contest with hostile natural forces and prevail are always appealing to potential buyers (Garland, et al., 2013). However, the presence of nature in car advertisements is also rather misleading as it diminishes the negative impact that vehicles have on air pollution with their detrimental for the environment fuel emissions (ibid; Gunster, 2004; Gunster, 2007; Li, 2013).

3. Methodology

For the analysis of the data, a multimodal discourse analysis approach is used. The difference from discourse analysis is that the first one takes advantage of all the non-verbal elements of communication. Most texts are multimodal i.e. consist of many significant for meaning-making dimensions along with spoken or

written forms of language (Jones, 2013). Kress & Van Leeuwen (2002) argue that a resource strong enough to create signs is actually a mode. Every aural, written, embodied, visual, animated text unit is seen as a semiotic resource with a meaning-making potential, which combined with others aims to construct an appealing, credible and convincing message (Rocci et al., 2013). According to the scholars that have adopted this perspective, the perception of the message cannot be clear or full without including all the modes that interact with each other (Jones, 2013). Kress & Van Leeuwen (2004) were the first ones to write about the importance of decomposing and exploring the “layers” of an image as part of the communicative act design.

O'Halloran (2004), Kress (2010), Jewitt, et al. (2016) continued this work by demonstrating research and practical tools on how different kinds of semiotics can be “read” into discourse and create a holistic view of the content of a text. Jewitt (2013: 251) advocates that:

“all modes have, like language, been shaped through their cultural, historical and social uses to realize social functions as required by different communities. Therefore, each mode is understood as having different meaning potentials or semiotic resources and to realize different kinds of communicative work.”

Something worth underlining is that all modes and semiotic resources are equally powerful to create meaning (ibid, Jewitt, et al., 2016). However, modes, as well as a

visual language, are culturally defined and situated. Therefore their understanding is not universal and standard but local and fluid just like societies that are constantly prone to change (Kress & Van Leeuwen, 2004).

The crucial factor that determines which and how particular semiotics will be used, is the context. As the context is dynamic, it is the one that eliminates the resources at the designer's disposal. A representation must be “built” to address the demands of a communicative situation in the best possible way (Jewitt, 2013). Whatever its purpose, it is interdependent on the suitability and selection of some semiotic resources. The central idea around semiotics is the sign-making, i.e. the process in which the elements are perceived as meaning (“signifieds”) (Kress & Van Leeuwen, 2004). The sign-production activates interest and invites for the interpretation. Since people interpret what is been given to them, this choice of resources cannot be random as they “constitute the ground on which the interpretation happens” (Kress, 2010: 36). Every choice that is being made by the designer is motivated and aims to draw attention and emphasize a certain aspect of meaning. Besides, if an intended sign is not interpreted, the whole concept of communication is refuted (ibid).

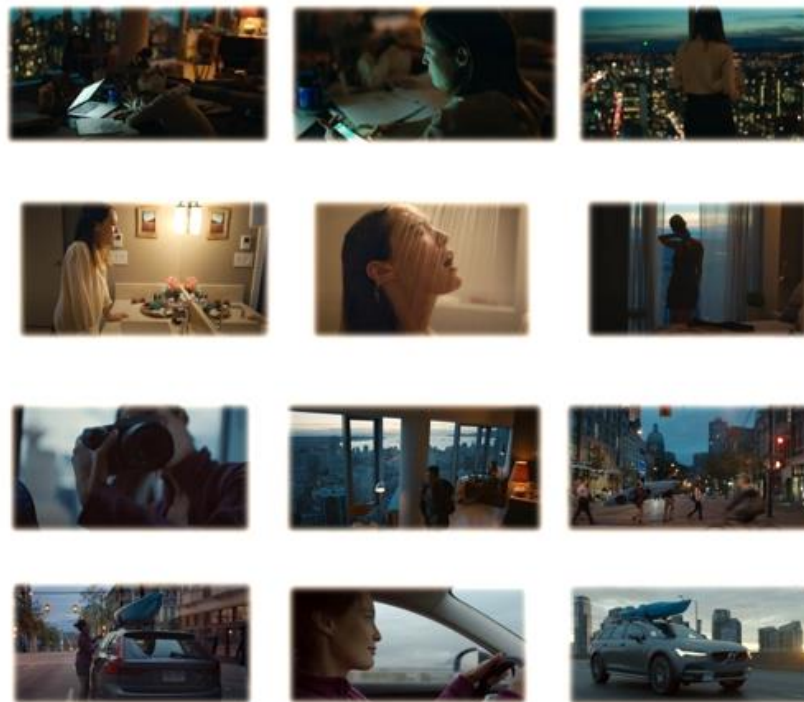


Figure 1: The Story

4. Data Description

In the advertisement to be analysed, the viewer watches the parallel stories of four people. The analysis will focus on only one of these, who seems to be a working young female in the western modern world. She is presented to be waking up in her luxurious apartment in the middle of the night (as it is dark) while sitting in her chair in front of the laptop. Judging from the background setting, she gives the impression of having fallen asleep during working on something. After she gets up, she takes a glance out of her glass doors to a city full of night lights and skyscrapers and then walks into the bathroom, stares at her reflection in

the mirror and takes a shower. As the sun is about to go up, she wears athletic clothes, picks up her camera and her canoes and goes out on the street where her VOLVO car is parked. In the last shot, she appears to be smiling and driving out of the city in the sunshine.

The city where this advertisement was shot is Vancouver, a modern and multicultural megacity. However, the exact location, as well as the natural environment of filming, are not in the foreground intentionally, because it makes it easier for the viewer to project their own lives when watching (Chen, 2016). Additionally, during the advertisement, Alan Watts can be heard in the background quoting some inspirational words from a

radio talk of his. He was a writer and speaker who unfolded the Eastern philosophy of Zen Buddhism to the Western world. In his books and speeches, he talked mainly about inner happiness, self-liberation, well-being and personal fulfilment (Alan Watts Organization, 2019). Moreover, there is a smooth instrumental melody filling the voice gaps that gradually becomes more vibrant and glorious.

4. Data Analysis

5.1 Elements of lifestyle

Work: The woman portrayed in the commercial is likely to have an office job. This can be argued by several artefacts in the first shots of her “life” (see figure 2). The setting of the living room and the desk where she is seen asleep has an opened computer and stacks of papers and folders on it. These signs are commonly representative of people working in administrative or managerial positions in an office and indicate a heavy workload. Another plausible assumption would be that the woman is a college

student studying intensively, maybe for a project or an assignment. The cup in front of her is placed very artfully, as comforting beverages like coffee or tea usually accompany people through a long day of studying or working. However, the distinction between the two possible professional statuses can be made if the viewer looks more closely at her dress code. Next to her desk, there is a pair of high-heel shoes clearly visible in the frame. Moreover, when the character stands and walks towards the window her full outfit is

revealed. She is wearing a white shirt and a black pencil skirt. This choice of clothing combined with these particular shoes as well as the lack of colours applies to a more strict, high-status profile than a student's. Regarding other elements in the first shot that construct the professional aspect of the character's life, on the right corner of the desk, there are two carton boxes with takeaway food. Although the designer could choose any kind of cuisine, for instance, an Italian pizza, the tall and square shape of the paper is characteristic of Asian food. Businesspeople and populations with high socioeconomic status are often depicted to eat Asian food because it is a symbol of an exotic, gourmet and delicate taste, linked to business meetings, multinational companies, financial welfare, prestigious men of affairs, etc. Thus, this artefact matches the previous indications about the female's working position. To emphasize the previous argument even further, judging from the addition of “delivery food” in the frame, the scenario of a very demanding and tiring schedule which doesn't allow the character a proper homemade meal is reinforced.



Figure 2: The cup, the food & the Shoes

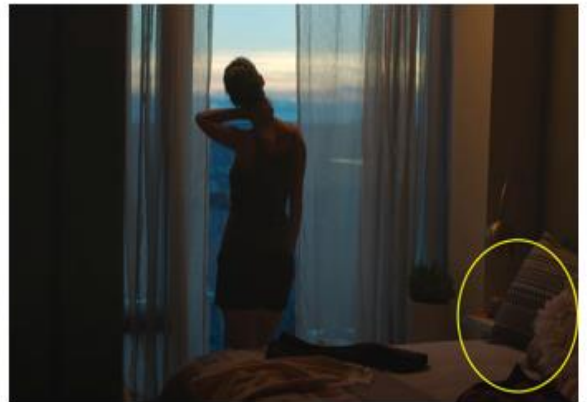


Figure 3: The toothbrush & the empty bed

Single: In the subsequent shot, a cat walks towards the character and she reaches out to pat it. The move that she produces makes the audience read some kind of tenderness and affection by her side, thus a need for connection. Furthermore, putting an animal life substituting a human one in this shot could be indicating to the viewers that the character is lacking human companionship. The setting of the living room is full of artefacts that are related to work, but none related to human relationships, e.g., photos of beloved ones. Therefore, the idea that she lives alone is built. This initial indication becomes a certainty in the following screenshot when we see her standing in the setting of the bathroom.

After observing more carefully all the artefacts next to the sink, it is clear that there is only one toothbrush. Later, looking at the furniture put in the setting of the bedroom, there is a perfectly made, but empty bed (see figure 3).

Decoration: The story of this young female character is situated in an urban context and the large city depicted through the glass windows has not the slightest connection to pure nature, outdoors landscapes, or countryside. However, there are several elements of nature included in various frames of this artificial domestic environment such as decorative flowerpots and paintings on the walls (see figure 4). By seeing these additions in every room of the setting, i.e., living room/hall,

bedroom and bathroom, the designer points out the idea that a part of “nature” can be found somehow even in a metropolitan area. What is more, including decorations with nature as thematic, even in a more unlikely setting like the bathroom, foreshadows the “escape” that will take place later in the advertisement.

5.2 Juxtaposing frames

A rather interesting observation throughout this Volvo advertisement is the contrasts that are gradually built as the parallel stories are unpacked. As mentioned before, a picture, a shot, a constructed representation can be perceived by the viewer in a much more intense way when it is differentiated from another one. In the female character’s scenario, her initial state is opposing to her latter, i.e., the depicted hard-working routine of hers goes through a transition point in which the car is the protagonist as it is presented to have “transformative impacts” on her self-identity (Gunster 2004; 2007 in Chen, 2016: 12). The design of the visual mode makes this shift appear stronger and emphasizes the central theme of the advertisement which is conveyed with the logo in the very last shot: “THE GETAWAY CAR.”

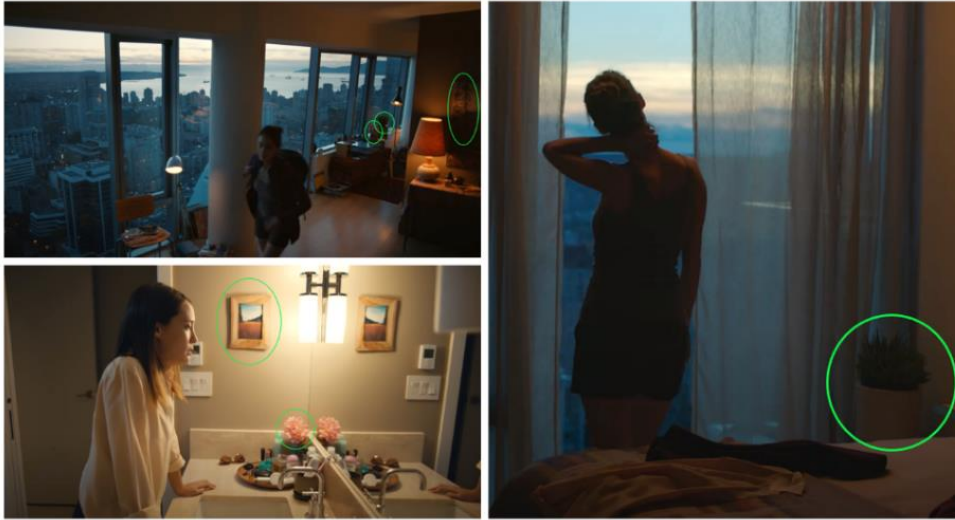


Figure 4: Paintings & Flowerpots

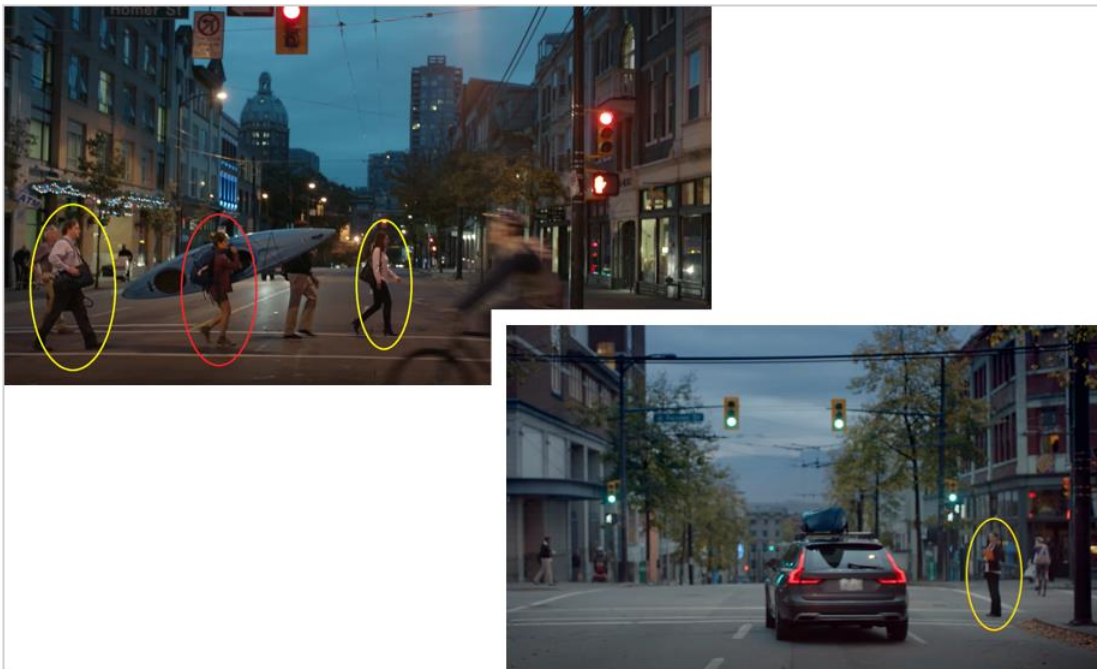


Figure 5: People going to work

City- Nature: First, the character is situated in a contemporary megacity setting with impressive, imposing glass buildings as we can see from the glass windows in screenshots 1 & 4.

Commenting once more on the set decoration which consists of artefacts connotating to nature, an antithesis is portrayed. Furthermore, the canoe that is selected as the protagonist's hobby is an activity that takes place outdoors, in a lake, river or sea, therefore completely opposing to this environment. Finally, the urban scenery fades away in the last shot, in which the skyscrapers are in the left direction of the road, whereas the car is heading towards the opposite way (screenshot 14 in the appendix).

Home/ Work- Adventure:

The first shots of the advertisement are constructed in a way which indicates that the female character in the apartment setting has been eating, working, and sleeping.

This starting point is to be rebutted as the scenario is developing, while all the actions the actress performs look as if she is not getting ready for another day of work (change of clothes, backpack, camera, canoe). In the scene where she is depicted to be crossing the street with her backpack and canoe, she passes by other people who seem to be going to work (see figure 5). This assumption is empowered when comparing their semi-formal dress code and her athletic look. One man is carrying a laptop bag. The same concept continues in the

frame where the car moves past the green traffic lights and on the right side of the road, a woman dressed similarly to the others is holding a folder. By including this woman in the frame, the designer contrasts these going to work with going outdoors females more profoundly. It also makes more likely the idea that the story in this advertisement takes place on a usual workday, and not a weekend or any special occasion.

Artificial lights- Daylight:

Another contrast, which is not so evident because the advertisement reproduces the first hours of daytime when the natural light gradually appears, is the shift from artificial light, or darkness to daylight. As with the contradiction between the character's routine and the transition to another phase, in the first part, the viewers see darkness, lamps all over the setting, radiation from the laptop and mobile phone screen, and the bright but "fake" light of the buildings outside the window. However, in the transitional scene when the female is in the bedroom setting, the industrial view from the window has been replaced by the more vivid colours of the aurora and the shift becomes apparent (see figure 6). Additionally, when the actress is portrayed to be leaving the apartment and her routine, several opened lamps are also left behind, i.e., artificial elements (screenshot 9 in the appendix). In the shots where the character is heading towards



Figure 6: Artificial & natural light



Figure 7: The traffic lights

her car, the streetlamps are still

open. However, along with the lampposts, there is a bright red traffic light. In the next shot, as she reaches the car and loads the canoe, the traffic light has turned orange. By the time she starts the car, the traffic light is green, giving her the “sign” to drive away. Therefore, in this case, artificial lights have the function of upgrading the presentation of the product (see figure 7). This is in perfect accordance with the philosophy of automobile adverts where there are no obstacles in the way of the car (Gunster, 2007). In the final frame of the advert, the sun rises and reflects the light to the Volvo ‘naturally’ (screenshot 14 in the appendix).

Immobility- Mobility:

looking out the window, looking at herself in the mirror. While stillness can be suggesting peacefulness, it is not accompanied by an expression of happiness here; consequently, it indicates a lack of vividness and spirit. The scene in the shower seems to be the breaking point; water is a sign of motion, of life, of rebirth in most cultures and is also relevant to the canoe that we see afterwards. In the following shots, the character looks more motivated and active. That is translated visually by watching her wearing clothes for sports (movement), taking her stuff, walking, driving. The vehicle allows this unstoppable mobility to continue as there are no other cars preventing motion (ibid). Hence the designer achieves to link the trait of

physical energy to a speedy car.

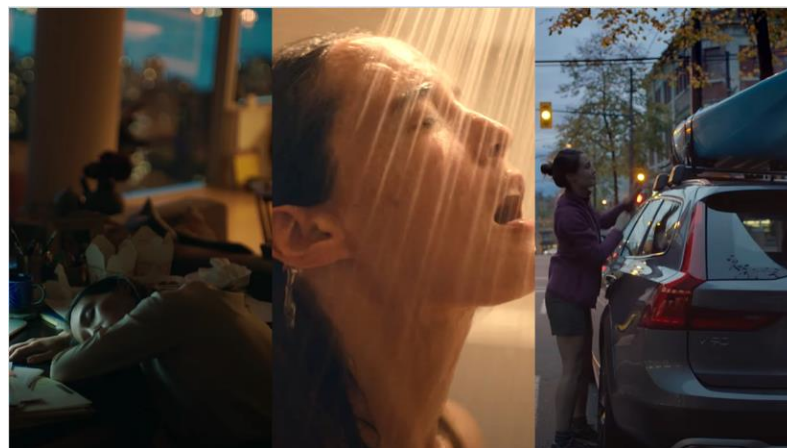


Figure 8: Becoming more active

In the advertisement, the character’s mood is not explicit to the viewers. However, a change is happening during various subphases that she appears to be going through. In the first scenes, she is presented more motionless, more passive. The director presents her sleeping, sitting, standing still,

Working- Showering:

The female actress in the advertisement, from the design of the first shots, gives the impression of a person exhausted from work, eating fast meals, not getting enough sleep, wearing her work clothes all day long (screenshots 1-

4 in the appendix). Nevertheless, the entering-the-bathroom scene unfolds another 'world' simulation. Apart from the decorative painting on the wall and the rose which indicate a different aspect of her character in this room's furnishing, the arrangement of all the cosmetics and products is less chaotic than the living room setting. The light is again artificial but combined with the bright pastel colour of the wall it becomes visually calming and less aggressive (screenshots 5-6 in the appendix). Moreover, the bathroom is the place where all people look after themselves and get refreshed. They clean their face, wash their hands, brush their teeth, put makeup on, have a bath. So very skillfully, the shower suggests a self-care stance which suits the change in the situation.

be sure of their interpretation. Colours are usually interdependent with the era, the context, the culture, the philosophy, the agenda of the discourse, thus the meaning-making process can be vague and fluid. In this section, the use of colour will not be discussed. The focus is going to be the initial lack of colour compared to the coloured clothes that the actress wears in the later scenes (see figure 10). In the first shots, the woman is wearing an office outfit which consists of a white shirt and a black skirt. Black and white are colours as well, but their palette of hues is much narrower. When she adopts a more athletic style, we cannot define the exact colours of her clothes because they are neither very bright nor vivid.



Figure 9: Change of attitude

Black & white- Colour:

Colours are a rather fascinating semiotic resource to investigate from a designer's point of view. However, even though there are several models of analysis regarding the symbolism and aim of a particular colour palette (Kress & Van Leeuwen, 2004), one can never

Despite that, in the scene where the character leaves the apartment setting, the lightning of the frame allows us to see a more colourful figure revealing her blue canoe, her backpack, the purple jacket and brown shoes. She stands out from the rest of the people in the frame who look more like her

previous neutral version. To add to that, her purple jacket is the element

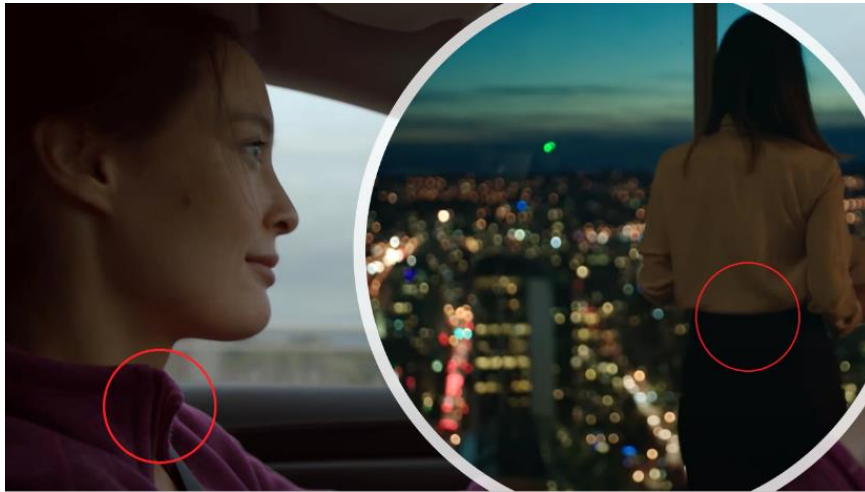


Figure 10: Change of clothing

that combined with the joyful expression she has in the car, gives the audience a sense of liveliness and joy from her side.

Emotionless- Expressive:

During the first frames where a close-up of the young actress is visible by the viewers, her expression seems numb. The character creates this impression because she is looking around but not really seeing anything. She appears to be lost in her thoughts, not actually focusing on the things that surround her even when she checks the phone or pats the cat. Her face looks serious, but without a specific emotion to it. This emotional construction can be read as if her current state does not make her content. Nevertheless, as we watch her after a few shots tying the canoe on top of her car, there is a perceptible smile on her face. Even if the viewer does not catch this

change of mood, in the next two shots where the character is depicted driving, there are two close-ups in which a brighter and noticeably confident smile is revealed. The audience can plausibly relate this shift of emotional state to the promoted product as whenever she appears to smile the car is present in the frame.

specific cultural environment and

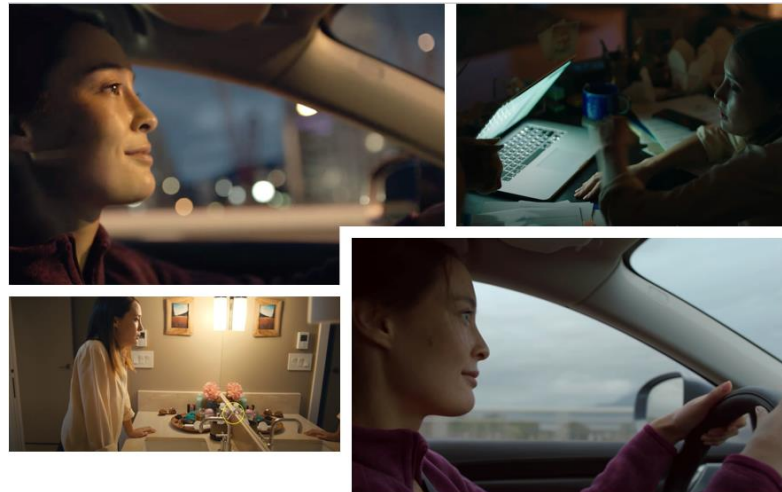


Figure 11: Facial expression

5. Discussion

This paper aimed to recognize and address some of the features that automobile advertisements usually employ to increase their effectiveness. Various scholars and researchers have already examined a big corpus of advertising discourses and unpacked several tactics and patterns related to the multimodal communication that occurs (e.g. Feng & Wignell, 2011; Budinsky & Bryant, 2013; Garland, et al., 2013; Rocci, et al., 2013; Chen, 2016; Kuswandini, 2018). Their main argument is that every kind of interaction should be analyzed with a multimodal lens because a conveyed message is more than just a verbal or a written text. Several overlapping modes interact together to produce a full meaning, and none of them is inferior to the other regarding their meaning-making potentials. Semiotic resources and signs are not universal but created within a

change and multiple interpretations. What should be taken into serious account are the designer's intentions, which underline the choices and decisions s/he make. After capturing the interest of the viewer, the main goal is to use signs which are 'compatible' with the consumers, therefore will become signifieds successfully. As a result, the selection of the most suitable for the social context semiotic resources defines the decode of the message and hopefully the receivers' persuasion. The advertisement for a Volvo car was the object of this analysis. The ad was deconstructed, and a young female's 'story' was explored with a critical view. Through choices made in the setting (apartment, background), some artefacts were observed in order to comment on how they are used to complete the

picture and inform the audience about the reality that is being constructed. Small details and elements in the screenshots provided clues referring to the character's status, lifestyle, occupation, and pastime interests. Moreover, the second section of the analysis included a collection of visual contrasts in the advertisement which were used to promote the superiority of the product and increase its symbolic value. The 'story' was divided into two parts in which the initial phase was dark, emotionless, artificial, colourless, passive while the transition connected to the product was bright, natural, colourful, adventurous, joyful, active. This observation supports the pattern of juxtaposing in advertising discourse which aims to produce a message more attractive and convincing to the potential consumers.

Looking back at the stages of advertisements, we could argue that the narrative stage describes to the audience the female's life until the moment she steps out of her apartment (screenshots 1-10 in the appendix). By that time, it has become evident that the character wants to make a change in her routine. It is the point when the Volvo car is introduced as the escape vehicle that takes her away from the dull city setting; it offers a solution to her problem (propaganda stage, see screenshots 11-13). Finally, when everything seems to be settled and the protagonist is enjoying the moment, the logo stage takes over as the last impression of this advertisement (see screenshots 14-

15). It should be noted that the second part is not so profound, because it is presented as the plot is developed. Hence the product can fit in very naturally for the rest of the ad, without the audience recognizing this new addition. Another characteristic is the significant role of nature and its symbolic meaning for human harmony, which has been found in the majority of automobile commercials. This Volvo ad is no exception. The car was considered the means to help the character reunite with the natural environment and live a happy life.

Overall, this case study confirms how multimodal discourse makes use of several modes and resources to create a satisfactory and complete meaning. The observations made in this particular TV commercial, are not necessarily applicable to all car ads. However, building advertisement collections with similar content, would lead to identifying and comprehending patterns applied by this marketing industry. As a result, the public will be better informed and able to evaluate with a more critical view the promoted automobile products. One last, interesting point for future analysis which was not found in the relevant literature, is the diminishment of physical exercise due to extensive car usage. One serious disadvantage of cars is the sedentary lifestyle they promote as consumers have the comfort and luxury of private vehicle ownership. Despite all that, in this advertisement, all four characters took off with their Volvos to engage with hobbies like fishing, surfing,

canoeing and cycling. From this perspective, the car can be seen as a tool to abandon a sitting life and pursue physical activities and sports.

Notes on contributor


Kleopatra Sideridou completed her Bachelor in Primary Education in Greece and gained some teaching experience. After coming to the UK, she completed her MA studies in Cross-Cultural Communication and Education in Newcastle University. She is currently a stage one PhD student. Her research interest includes observing and analyzing naturally occurring social interactions using the principles of Conversation Analysis. At the moment, she is looking at dentist-patient communication.

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7. Appendix

<i>Screenshot No</i>	<i>Visual Image</i>	<i>Image Description</i>	<i>Sound Transcription</i>
1		Female sleeping at night on her desk	"My goodness, don't you remember when you went first to school"
2		Waking up- patting her cat	"And then when you get to college"
3		Checking her phone	"Comes the struggle for success and the profession of business"
4		Standing up- looking through the window	"When you're about forty or forty five years old in the middle of life, you wake up one day and say... Huh?"
5		Looking herself in the mirror of her bathroom	"And while it is of tremendous use for us"
6		Taking a shower	"To be able to look ahead and to plan"
7		Looking through the window in her sports clothes	music

<https://www.youtube.com/watch?v=IcF9NMhN2AQ>

8		She is wiping her camera	"The fruits of one actions"
9		Leaving the apartment	music
10		Crossing the road- carrying her canoes	music
11		Tying the canoes on her parked car	music
12		Departing with her Volvo car	music
13		Smiling in her car while driving	music
14		Heading away from the city- sun going up	music
15		Female looking at the road ahead and smiling	music

<https://www.youtube.com/watch?v=IcF9NMhN2AQ>



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