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EDITORIAL

THE MIRRORED MAZE OF MARTIAL ARTS STUDIES: FROM RESEARCH NETWORK TO SCHOLARLY ASSOCIATION

PAUL BOWMAN, ALEX CHANNON, BEN JUDKINS, LAUREN MILLER & WAYNE WONG

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ABSTRACT

This editorial reflects on the status and development of martial arts studies as an academic field. It considers the differences between the notions of academic discipline and academic discourse. It suggests that the common metaphor of an academic 'field' is inappropriate for describing the terrain or topography of an academic discourse or discipline, and proposes that a better metaphor for describing this realm might be 'mirrored maze'. After characterising this situation, the editorial recalls the recent history of the establishment of anglophone martial arts studies via the establishment of the Martial Arts Studies Research Network. Following this, the editorial announces that, after almost a decade of development, the latest stage of the martial arts studies project is the creation of The Martial Arts Studies Association.

INTRODUCTION: HOW LONG HAS MARTIAL ARTS STUDIES EXISTED?

How long has martial arts studies existed? There have been many studies of different aspects of martial arts across different disciplines and in different languages for many years. But this does not mean that martial arts studies, as an academic discourse, has existed all that time. Before martial arts studies developed in the anglophone academic world, scholarly studies of martial arts were quite episodic or isolated. Indeed, when appraised in terms of other academic concerns, such studies ran the risk of being written off as idiosyncratic, eccentric, or trivial [Bowman, 2019, pp. 19–32; Bowman & Judkins, 2017]. Academics who sought to research and write about martial arts were forced to justify this focus by appeal to the aims and concerns of their disciplinary field. Hence, historians could argue that the discipline of history should not overlook martial arts as a part of history; anthropologists, ethnographers, sociologists or subcultural studies scholars could justify the study of martial arts groups on the basis of the fact that (no matter how odd) martial arts groups were nonetheless *social groups*. And so on, through the disciplines.

In this way, scholarly studies of martial arts have long been possible. But when was the field of martial arts studies born, created, or constructed? To answer this question, we need to work out what it means to say that any academic field exists.

WHAT IS AN ACADEMIC FIELD?

Back in 1996, when discussing the still quite-young field of cultural studies,¹ John Storey proposed that for an academic discipline to exist, there needs to be a broad agreement about three things: first, about ‘the object of study’; second, about some ‘basic assumptions which underpin the method(s) of approach to the object of study’; and three, a shared awareness of ‘the history of the discipline itself’ [Storey, 1996, p. 1; see also Young, 1999]. In other words, in Storey’s sense, there needs to be a community of scholars who broadly agree on some starting points about what they are looking into, and how they are doing it, with a shared awareness of the past and ongoing attempts of scholars to develop insights into the ‘object’.

However, there is a paradox around disciplinary formation. This is because, for an academic discipline (or field, or discourse) to exist, there cannot be complete agreement on everything (object, aims, theory, method). If there were, there would be consensus and ultimately nothing new to ask, explore, or pursue. The ‘object’ would have the status of a problem to be solved, or a question to be answered; and, once answered, that would be the end of the matter. Put differently, despite

¹ Although the origins of cultural studies can be traced back to the 1950s, with the first centre for cultural studies being founded at the University of Birmingham in 1964, the first major internationally-marketed anthology that proudly declared the existence of a new field called ‘cultural studies’ was not published until 1992 [Grossberg & Nelson, 1992; Hall, 1992].

what we may presume about academic fields, an academic field is perhaps the one place that will not have all the answers to all the questions about the very thing it would seem to be set up to find out all about – whether that be sociology about society, anthropology about the human, psychology about the mind, or indeed martial arts studies about martial arts. This is not to say that a discipline does not have any answers about its eponymous object (in the way that being ignorant about a subject means you have no answers). Rather, a discipline tends to have too many different possible answers. This is caused by the proliferation of different formulations of questions, objects, theories, methods, and modes of interpretation. A discipline is a space for the proliferation of hypotheses, questions, theories and methods, and hence, in a sense, the generation of uncertainty.

As Rey Chow once put it (also writing about cultural studies): while other academic disciplines may be comfortable with one or another understanding of the meaning of the word ‘culture’, the field of cultural studies itself is constantly agonising about what an adequate understanding of culture could possibly be, often even doubting whether such a thing as ‘culture’ even exists at all. As Chow sees it, the fact that no one in cultural studies can agree on what culture is, is one of the key forces that actually sustains the field.

THE PARADOX OF ACADEMIC ENQUIRY

Thus, the paradox of academic disciplines and fields is that they often seem to achieve uncertainty, which would seem to be the very opposite of what they set out to achieve. It is as if the way that academic discourses approach things (inviting more questions, more quibbles, more qualifications, more hypotheses, more theories, more angles, more precautions, and so on) means that they can never achieve what they seemed to want to achieve (i.e., sure and stable knowledge). However, in an academic discourse or discipline, both of the following apparently contradictory propositions coexist at the same time: 1. academic discourse does seek to establish new knowledge; yet 2. academic discourse does not tend towards agreement.

Along with the tendency to dispute and disagree, another factor bearing on the lack of stasis or enduring ‘agreement’ in an academic field relates to what Knorr-Cetina described as the constant self-unfolding of an object of study [Knorr-Cetina, 2003]. An object of knowledge (or, rather, perhaps a better term would be an object of study) is continuously self-unfolding [Knorr-Cetina, 2003; Spatz, 2015]. On the one hand, it remains interesting precisely to the extent that it stimulates new questions, new avenues of exploration, new and unexpected insights, and evermore new puzzles. On the other hand, and at the same time, if you modify the frames and tools used to conceptualise and approach something; if you change the hypotheses made about it and the questions posed about it, then different things can be seen. As the literary theorist Paul de Man once argued, every insight is premised on a certain kind of blind-spot [De Man, 1983]. Hence, new insights emerge by noting the blind-spots of previous work and changing the frames to ‘fix’ the perspective. Of course, even the newly ‘rectified’ perspective will have its own blind-spots, or things that it cannot (currently) perceive.

In discussing the development of scientific knowledge, Jean-François Lyotard picked up Ludwig Wittgenstein's term 'language game', to argue that research is always premised upon the creation of a language game [Lyotard, 1984]. Different disciplines, and different subsections within disciplines, each construct different theoretical universes – different paradigms or 'interpretation machines', that are used to conceptualise and explore objects and problems in different ways [see also Kuhn, 1962].

ACADEMIC FIELD, OR MIRRORED MAZE?

Accordingly, if we follow the implications of Lyotard's thinking, then we will come to the realisation that the very idea that academic 'fields' are anything like real-world fields is fundamentally mistaken. The metaphor is misleading. An academic field is not at all like a farmer's field, which we imagine as flat and rectangular, in which you can stand anywhere and see anywhere else within it, and in which all the crops are uniform. An academic 'field' is not at all like this. Perhaps a better metaphor than 'academic field' would be 'academic hall of mirrors' – a hall of mirrors that is also a maze. In a hall of mirrors in a funfair, you never quite know where you are; there seems to be no fixed, natural, stable perspective; you cannot see yourself or other people or objects in a normal way at all. Size, perspective, shape, movement and form are all determined by the angles, curves, and interrelations of different mirrors, and one's position in relation to them.

Unlike glancing around in a field, finding one's way around in a mirrored maze would involve a serious and sustained effort. Learning how to use the different mirrors and positions for different purposes would be another task. This would be made all the more difficult if other people were constantly moving the mirrors and other materials around too. But this is precisely what happens in the mirrored mazes of academic discourses. The history of a discipline itself is the history of these changes and developments. But this 'history' is not only a story. Rather, disciplinary history leaves traces, which are still available in the present, in the form of the different assumptions, hypotheses, paradigms, methodologies and positions available to a researcher.

Of course, there is one perspective from which a mirrored maze or a hall of mirrors becomes clear and navigable. This is the plan-view, or map. In the academic world, there are a few different actualisations of this metaphor. The key one – the most fluid and responsive – is the academic journal. If, hypothetically, one academic field had one academic journal (a proposition we can complicate in due course), then each published issue of that journal might be regarded as a kind of plan-view snapshot of the landscape at a given time. Of course, an academic journal issue is not merely a neutral or simply objective reflection of what is going on in a landscape at a given time. As Jacques Derrida might say (following J.L. Austin), it is not merely a 'constative' or merely descriptive statement about what is going on; it is also 'performative' – helping to produce or generate the state of affairs that it might seem merely to describe [Derrida, 1988]. A journal is performative in that it solicits, selects, curates, and performs the state of the discipline. Nor is the journal of a field simply a kind of census; rather, it is closer to what Michel

Foucault called 'panopticism' – a mode of monitoring that arguably changes the behaviour of those being monitored [Foucault, 1977, pp. 170–171]. The journal generates the work that defines the field.

There are other ways of constructing a plan-view or map of an academic landscape. At one end of the spectrum, the encyclopaedia, the glossary, the edited collection or the textbook, all work to reify, spatialise and hierarchise what might otherwise feel amorphous and chaotic. At the other end, the academic conference feels the most alive – like going to a zoo rather than a museum.²

THE REALIA OF DISCOURSE

In other words, it is the existence of these entities – the conference, the journal, the collection, and so on – that constitute the conditions of possibility for the actual ongoing existence of an academic- ... what shall we call it? Field? Mirrored maze? Perhaps the best term is discourse. This is because, after Foucault, the term 'discourse' means both literal 'conversation' and all of the other ways that a 'conversation' might be said to take place in indirect ways, such as in written texts, in institutional documents, in policies and constitutions, in direct inspirations and vague influences, in intertextual allusions and knock on consequences, in the setting up of new modules on degree programmes, and the creation of new degree programmes themselves; in the production of new PhD projects and the recognisable institutional or professional ability to supervise those projects; in the ability to demonstrate the credentials and to present oneself as appropriately 'qualified' to win grants and funding; and so on.

In a strong sense, it is the existence of an interconnected, interacting, communicating publishing ecology which most attests to the degree of existence of an academic discourse. The more interconnected and self-aware the publishing network, the easier it is to navigate the terrain. Before the birth of martial arts studies, even the elementary scholarly task of carrying out a preliminary literature review (which is, of course, the fundamental stage of any research project) was no easy task. This is because there was no coherent discourse, no connected conversations. A chapter in an anthropology book here, a mention in a history book there; an essay in a book of film studies here, a reference in a philosophy book there; mountains of amateur scholars each claiming to develop the first ever theory of this or that to do with martial arts – and all the rest of it – does not make a discourse, a discipline, an interdiscipline, or a research nexus. An academic discourse requires literal discourse – conversation, debate, disagreement, challenge, collaboration, cross-fertilization.

Over the last decade, things have become a lot clearer, and literature reviews a lot easier. For within the last decade, martial arts studies has

² Of course, as noted by Rey Chow (following John Berger), even when viewing animals in a zoo, one is not 'really seeing' them, as the entire experience has been constructed and organised by the frames and walls of the zoo. The way we view animals in a zoo is constitutively warped or out of focus – as if we are in a hall of mirrors without realising it [Chow, 2002, pp. 95–127].

announced itself in all of the key ways described above – from scholarly blogs through to journals, along with conferences and numerous books, along with social media groups and email lists, all self-identifying as ‘martial arts studies’. Of course, this has been hugely enabled by the technological advances that have generated a massive increase in ever more easily (and thoroughly) searchable online archives and databases in university and national libraries around the world. But it has also been the result of a self-conscious set of projects in different linguistic (if not national) contexts around the world.

MARTIAL ARTS STUDIES AS A PROJECT

Here we can only deal with anglophone martial arts studies. When was its birth? There are many possible points that could be suggested – and each of these has its own prehistory. However, a key work to propose the existence of a nascent martial arts studies was Farrer and Whalen-Bridge’s edited collection, *Martial Arts as Embodied Knowledge: Asian Traditions in a Transnational World* [Farrer & Whalen-Bridge, 2011]. Like other works appearing at this time [see, for instance García & Spencer, 2014; also Spencer, 2011], this work conveyed a clear narrative account of the history of the development of the anglophone academic study of martial arts. To return to John Storey’s argument that was evoked earlier: this is significant because the ability to narrate the stages of a shared history is a key component in the establishment of a field or discipline. However, what was unique about Farrer and Whalen-Bridge’s work was the recognition that the growing body of studies of martial arts across the arts, humanities and social sciences could perhaps be regarded as the emergence of something that, they suggested, should be called ‘martial arts studies’.

Inspired by this proposition, in 2013, Paul Bowman sent out a call for papers for a special themed issue of *JOMEC Journal* – an issue that would be called, simply, ‘Martial Arts Studies’. This issue came together and was published in 2014. It was a rich, expansive and disciplinarily diverse issue of the journal, with contributions from all over the world and all across the humanities disciplines, preceded by an editorial reflection on the arrival of this exciting new nexus [Bowman, 2014].

This was followed up in 2015 by the first of what would become an annual international conference, initially hosted in the School of Journalism, Media and Culture at Cardiff University. In the same year, the monograph, *Martial Arts Studies: Disrupting Disciplinary Boundaries* [Bowman, 2015] was published, and Bowman secured a grant from the UK’s Arts and Humanities Research Council (AHRC) to establish the Martial Arts Studies Research Network. In the same year, the first issue of the journal *Martial Arts Studies* was also published.

This flurry of activity in 2015 might be regarded as the definitive date of birth of anglophone martial arts studies as a self-conscious research area – or maybe the date it started walking. Researchers from other national, regional and linguistic research networks and associations attended the Cardiff conferences and published in our journal, and of course anglophone scholars reciprocated. Conferences, publications and

collaborations flourished. These activities were also bolstered in the book domain by a martial arts studies book series, which between 2016 and 2022 published five seminal works [Amos, 2021; Bowman, 2017; Goto-Jones, 2016; Molle, 2022; Trausch, 2018], plus the first reader of this emergent field [Bowman, 2018]. And then the lockdown of 2020 saw the arrival of The Martial Arts Studies Podcast.

The project of creating martial arts studies as an academic discourse can therefore be said to have been a major success during these years. It is now not uncommon to hear people talk about martial arts studies as if it is quite simply, obviously and self-evidently a thing that just naturally exists. A generation of PhD graduates now self-identify as martial arts studies scholars. Academics working in other areas make reference to martial arts studies as a field.

BEYOND THE NETWORK

Clearly, the work of the Martial Arts Studies Research Network has now produced more than a loosely connected network of researchers. Martial arts studies is now definitely a 'field' (or mirrored maze); and arguably well on its way to becoming a discipline – with fundamental questions, canonical texts, entrenched problematics, and established approaches. So, the question, then, is: what is the next stage for martial arts studies? With evermore researchers working in the area, with more modules and programmes and even degree programmes being developed; with more journals and publications, and certainly more conferences; with more grant applications and successes; with more connections being forged between and beyond universities and other institutions; the question, really, is: what is needed?

Given the growth and proliferation of martial arts studies across so many contexts, there is arguably now a need for further institutional development – some way of enabling the field to flourish further, and in new ways; some way of further raising the profile of the field and those who have contributed to it.

After much debate and deliberation among research network members, it was felt that the time was now right to found a martial arts studies association – a scholarly association or learned society, whose first focus would relate to the further development of the highest quality scholarship. Hence, our founding of The Martial Arts Studies Association as a scholarly association or learned society whose mission is to promote and advance the academic study of the martial arts. The Martial Arts Studies Association seeks to foster work that is rigorous, original and significant, and to continue to bring diverse academic discourses into dialogue with one another. It also seeks to promote and disseminate martial arts studies scholarship outside of the university context, primarily by advocating open access publication and non-profit events and activities.

The original Martial Arts Studies Research Network of course continues, in the same way. Alongside this, the principal activities of the Martial Arts Studies Association remain, first, partnering with univer-

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sities and other institutions to hold academic conferences, and second, continuing to publish the highest-quality peer-reviewed academic scholarship in our open access journal, *Martial Arts Studies*.

The Association will also seek to generate, foster and support other types of publication, activity and collaboration; to offer recognition for outstanding contributions to the field; and to guide external agents and agencies (such as research councils) towards scholars with specific expertise who will be able to offer expert consultancy or peer review.

The governance structure and terms of association of the Martial Arts Studies Association will always seek to be simple and transparent. In its founding form, it consists essentially of a board and members. The founding members of the board are a small group who have been extremely active and collaborative in the promotion and development of martial arts studies during the last decade. Anyone who wishes to be a member will be invited to apply, via submission of a CV and a brief statement about their past, current and intended future contributions to the academic field of martial arts studies.

In due course, the Association will also have fellows. Fellowship will also be based on application or nomination, and fellows will be selected based on their consistent and significant contributions to martial arts studies, via (for example) conference participation and organisation, and/or contributions to the journal, in terms of publishing or reviewing. A fellowship of the Martial Arts Studies Association is intended to be an honorary award, one that signals the high esteem within which a scholar is held in the field of martial arts studies.

WHY THE ASSOCIATION?

Some might ask why – as in: why we are engaging in this development, and/or why anyone might want to get involved. To take the second question first: As the Martial Arts Studies Association grows and develops, it is anticipated that membership will attract an ongoing range of benefits, such as extra focused events open only to members; access to unique research materials or resources related to martial arts studies; enhanced networking opportunities with fellow scholars, researchers, and practitioners in the field; priority consideration for presenting research at conferences organised by the Association; opportunities to collaborate on joint research projects or publications; access to specialised workshops or training events; eligibility for awards or grants offered by the Association to support research endeavours; participation in webinars or virtual discussions led by prominent scholars in martial arts studies; recognition through the Association's official website and publications; potential discounts on publications, books, or other academic materials related to martial arts studies; opportunities to serve as peer reviewers for the Association's publications; the chance to host or organise Association-sponsored events or workshops; and eligibility for leadership roles within the Association, such as Board positions.

Anyone who is already interested or invested in the field of martial arts studies will perceive the benefits of such extra dimensions. They

might also intuit the need for them. Not all events can or should be entry-level, or open to all. To take a discourse or a practice to a higher level requires more intensive and advanced events and interactions. An analogy from the field of martial arts practice seems apt here: basic entry-level fundamental classes are absolutely essential in teaching and learning martial arts. But one can only hope to grow as a practitioner by attending more advanced classes too. And those who teach the advanced classes need to immerse themselves in even higher level practice, in order to push their own development, and hence the development of the art or science itself. Hence, the Martial Arts Studies Association seeks to generate further opportunities for advanced study within, and for the advancement of the academic field, discipline, discourse, or indeed mirrored maze of martial arts studies.

This does not contradict our open access ethos. It does not constitute a closing down of opportunities. Rather, it constitutes the further proliferation of access points and a wider range of opportunities. The Martial Arts Studies Association exists to enable more – more varied, more diverse, more variegated – opportunities for the development, both of the 'field', and of those working within it.

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ABSTRACT

As capoeira globalizes, a growing number of non-Brazilian practitioners have the opportunity to become capoeira masters (*mestres*). In this context, my contribution analyses strategies followed by the first Mexican man and woman to obtain what Lauren Miller calls the ‘ultimate marker of authenticity’. As I have argued elsewhere [Contreras Islas 2021], Mexican capoeira is interesting because it seems to have achieved a more advanced glocalization state than ‘diasporic capoeira’ in the Global North. Thus, examining the life stories of Mexican *mestres* is interesting for comparing the dynamics of authenticity/legitimacy in globalized capoeira across the North-South divide. While my findings corroborate many of Miller’s observations regarding the strategies that non-Brazilian capoeiristas employ to achieve legitimacy, they also point out some crucial differences in issues such as innovation, apprenticeship pilgrimages, and the status of the title of *mestre* as the ‘ultimate marker of authenticity’. These differences may relate to peculiarities of specific capoeira styles, differences in capoeira’s globalization processes or gender issues.

INTRODUCTION

Capoeira is one of the most consistently studied martial arts in academic circles. In the English-speaking world, for instance, the earliest studies on the subject date back to the anthropological work of Ruth Landes [1947], and have increased since the 1990s with publications by Lowell Lewis [1992], Matthias Assunção [2005], Greg Downey [2005], Lauren Miller [2016] and the team of Sara Delamont, Neil Stephens and Claudio Campos [2017], among many others. Capoeira studies comprise an interdisciplinary field in which history, anthropology, sociology, pedagogy and others converge. Recent topics in this field include studies of globalization, migration and mobility in capoeira [e.g., Guizardi 2013; Miller 2016; Gonzalez Varela 2019]. A recurring question in this context concerns the authenticity and legitimacy of globalized capoeira as it expands outside Brazil [Joseph 2008b; Guizardi 2011; Miller 2013]. This article aims to further explore this question.

Following in the steps of Lauren Miller [2013; 2016; with Marion 2018], this contribution analyses the strategies used by non-Brazilian capoeiristas to obtain what she calls the ‘ultimate marker of authenticity’ [Miller 2016: 43]: the title of mestre. I hypothesise that such strategies change with the structure of the social field of capoeira in different regions of the globe – for example, between ‘diasporic capoeira’ [Delamont & Stephens 2008] in the Global North and ‘globalized capoeira’ in Mexico [Contreras Islas 2021]. To that end, I analyze the life stories of Cigano and Rosita¹ – the first Mexican man and woman to become mestres. By doing so, I aim to expand our current understanding of the dynamics of authenticity/legitimacy in different capoeira styles and contexts while challenging taken-for-granted assumptions about the globalization of the art as it has been studied in and written about by people in the Global North [see: Contreras Islas 2021].

In general, my findings corroborate many of Miller’s observations regarding the strategies non-Brazilian capoeiristas use to gain legitimacy. However, I also find some notable differences regarding the role of innovation, the relevance and destinations of apprenticeship pilgrimages, and the status of the title of mestre as the ‘ultimate marker of authenticity’. While some of these findings may relate to characteristics specific to particular capoeira styles and schools, others could arise from differences in capoeira’s globalization processes across the North-South divide [Contreras Islas 2021] or gender issues [Guizardi & Ypeij 2016].

I begin by briefly outlining some of the main points of Miller’s work on authenticity and legitimacy in capoeira. Next, I present my methodology. After outlining the context of capoeira in Mexico, I recount the process by which Rosita and Cigano came to be the first Mexican mestres, as well as some of the experiences they have had while bearing this title. In the process, I discuss similarities with and differences from Miller’s observations. Finally, I summarize my main findings and indicate possible avenues for future research.

1 Capoeira practitioners are given a nickname or ‘nom de guerre,’ by which they are known within the community. Cigano and Rosita have allowed me to use their actual capoeira names throughout this article.

AUTHENTICITY AND LEGITIMACY IN CAPOEIRA

Authenticity and legitimacy are prevalent issues in the capoeira community, as attested to by the frequent clashes between capoeira Angola and capoeira regional and the mutual suspicion that practitioners of both styles often express toward the so-called capoeira *contemporânea*. Likewise, there are recurring discussions about the criteria a person must meet to legitimately teach capoeira, for instance, when a professor or contramestre breaks away from their group to begin independent work [Delamont, Stephens & Campos 2017: 96-97].

The globalization of capoeira has fuelled discussions of legitimacy and authenticity. In a global market where a product’s (perceived) authenticity is highly valued [Joseph 2008b], aspects such as skin colour or nationality can directly influence the potential income of capoeira instructors [Stephens & Delamont 2006]. Within such an ‘economy of authenticity’, the rising number of competent non-Brazilian capoeira trainers poses questions about their work’s legitimacy. As a Mexican capoeira contramestre² formed in an independent group³ run by Mexican mestres, I am interested in understanding the processes by which non-Brazilian capoeiristas obtain markers of authenticity to legitimize their work.

For Miller [2016], authenticity and legitimacy are related. Both comprise value judgements of a practice, a person or a work of art according to normative ideals specific to a given social field. However, authenticity is especially relevant when judging from the margins of the social field, i.e., for people who do not have in-depth knowledge of the practice. For example, ‘novices abroad [will] evaluate a teacher’s authenticity based on whether he or she fits their stereotypical notion of a capoeirista’ [Miller 2016: 43]. Legitimacy, on the other hand, refers to the evaluation of ‘insiders [who] understand the rules of the game’ [Miller 2016: 43].

It follows that, as practitioners move deeper into the social field of capoeira, stereotypical markers of authenticity (e.g., being an Afro-Brazilian man) would lose relevance to scientific (e.g., lineage) and charismatic (e.g., dedication to the practice) criteria. However, one should not underestimate the potential of stereotypical markers to affect legitimacy, which is arguably negotiated in a field of tension between all three criteria. Table 1 summarizes Miller’s proposed markers of authenticity/legitimacy in the case of capoeira.

2 Literally: boatswain. Title given to the assistant of a mestre and second highest rank in the capoeira hierarchy.

3 I.e., a group not affiliated with Brazilian ‘franchises’ [Miller 2016] nor led by Brazilian mestres [see: Contreras Islas 2021].

Table 1: Markers of authenticity/legitimacy in the social field of capoeira, as proposed by Miller [2013; 2016].

Markers	Definition	Examples
Stereotypical	They encompass aspects of an 'ideal' capoeirista. They include mainly physical characteristics, which are obtained 'by birth'.	Race, gender, nationality, religion or socio-economic background. The stereotypical capoeirista is a black, heterosexual Brazilian man of low socio-economic background and a candomblé practitioner [Miller 2013].
Charismatic	Refers to 'an individual's non-marketable proclivities that facilitate popularity within a local scene' [Miller 2016: 124]. They include personality traits and 'virtues' that may be acquired.	Dedication to practice, volunteering, openness to exchange information, interest in history and culture, learning Portuguese, learning to play instruments, going on apprenticeship pilgrimages, etc.
Scientific	They refer to established institutions within the social field, which practitioners recognize independently of subjective judgements.	Belonging to a group, being a disciple of a recognized master (lineage) or having obtained a high rank, especially professor/treinel, contramestre or mestre.

Markers of authenticity operate as forms of cultural capital since having/acquiring them can change a person's positioning in the social field. Furthermore, according to Miller, receiving the title of mestre (either by the community or by a renowned mestre) would be the ultimate indicator of legitimacy in capoeira.

Cigano and Rosita were the first Mexican man and woman to become mestres in 2013 and 2017, respectively. Furthermore, they received the title from the renowned Mestre Acordeon despite lacking most of the stereotypical markers of authenticity⁴ and leading an independent capoeira group in Mexico City. Since 2013, Cigano and Rosita have formed two generations of Mexican contramestres – most of whom have never been to Brazil, nor trained regularly under the supervision of a Brazilian mestre. Based on Miller's theory, the latter argues for Cigano and Rosita's life stories being relevant to understanding the authenticity/legitimacy dynamics in the context of Mexican capoeira.

METHODOLOGY

In September 2020, I conducted in-depth interviews with Mestre Cigano and Mestra Rosita. In that context, I asked them to speak freely about the path leading them to become mestres and their experiences since then. The interviews were conducted and recorded on the Zoom platform due to the social distancing measures in place at that time. The recordings, with a total duration of two hours and twenty-one minutes, were analyzed with the qualitative analysis software Atlas.ti to identify issues related to the question of authenticity/legitimacy. While the categories in Table 1 served as an initial guide for this analysis, other categories were generated inductively from the data (e.g., references to innovation as a possible marker of legitimacy: see below).

⁴ Cigano is a white Mexican man in his late fifties, and Rosita is a light brown-skinned Mexican woman in her mid-forties. Both are university educated, both belong to the middle class, and neither is of African descent.

The analysed and thematically categorised interviews served as a base to write 'life stories' [Ferraton 2007]. The elaboration of life stories requires that the data expressed in the interviews be corroborated in additional documents like letters, diaries, photographs, audio, videos and even objects [Hernández Sampieri et al. 2014]. In this case, the documentary review was based primarily on audio podcasts of the online radio programs Divagar Radio [Chávez González et al. 2017-2018] and Vadiar Radio [Chávez González et al. 2018-present], as well as academic [Pérez 2013; González Varela 2019] and non-academic [Flores Ochoa 2000] bibliographical sources that have dealt with the history of capoeira in Mexico. Finally, I also drew on my experience as a Mexican capoeirista formed by Rosita and Cigano, approaching it from an autoethnographic perspective [Blanco 2012].

I reviewed the life stories and the final version of this article jointly with Rosita and Cigano. Both approved its content and consented to use their real capoeira names. This paper's results and discussion maintain these life stories' narrative and critical spirit. Before presenting the results, however, it is worth briefly characterizing the context of capoeira in Mexico to situate my study.

THE CONTEXT OF CAPOEIRA IN MEXICO

At first glance, capoeira in Mexico is not so different from what other scholars have observed in the United Kingdom [Delamont, Stephens & Campos 2017], Canada [Joseph 2008a] or even Brazil [Lewis 1995; Downey 2005; 2008]. A capoeira lesson, for example, follows a 'familiar' structure that includes an aerobic warm-up, followed by the practice of isolated movements that are gradually assembled into more complex

sequences and finally performed in pairs. The exercises are performed to recorded capoeira music, and teachers will use minimal verbal explanations. The same applies to the structure and dynamics of the capoeira *rodas*,⁵ which follow the spatial and temporal patterns observed by Lewis in Brazil [1992: 87, 115], with minimal variations. Additionally, just as in Europe and the USA, capoeira in Mexico is practiced mainly as a middle-class 'hobby'.⁶

However, there are some particularities of the Mexican capoeira-scene that differentiate it from the scene in Brazil and in the regions of the Global North. A list of these particularities would include:

- a) A 'lack' of Brazilian mestres
- b) The existence of strong 'independent' local groups
- c) Intense cultural hybridization
- d) A tendency to organise capoeira events with Mexican guests

In the following I will briefly elaborate on each of these points.

a) The lack of Brazilian mestres

From the beginning, the people who brought capoeira to Mexico were not Brazilians, but Mexicans, Argentines and Japanese [Contreras Islas 2021]. The first documented capoeira workshop in Mexico was held by Argentinian Mariano Andrade (now Contracestre Manhoso) in Mexico City 1992 [Flores Ochoa 2000: 15]. In 1995, Mexican Víctor Montes (now Contracestre Tequila) opened the first 'franchise' of the group *Terreiro do Brasil* in Guadalajara. Finally, in 1998, Japanese Instructor Japão began teaching in Xalapa under the group *Cativeiro*. In fact, before 2000, no Brazilian mestre had permanent residence in the country and today they remain a minority compared to native teachers – which contrasts with the situation in Europe and the United States, for example. There are diverse possible explanations for this 'lack' [see: Contreras Islas 2021]. For example, it has been mentioned that the Mexican market might be less attractive to Brazilian capoeiristas than the economies of the Global North. Consequently, most mestres would use Mexico only as a stopover on their way to the United States [see González Varela 2019: 118-119]. In this sense, the situation of Brazilian capoeiristas would be similar to that of Mexican workers migrating

5 The ritual circle in which capoeira is played.

6 This situation is similar to Europe and the United States but contrasts with Brazil, where capoeira has historically been associated with the working classes [Köhler 2015]. While it is true that more and more middle-class Brazilians have taken up capoeira as a hobby in recent decades, there is still a certain stigma attached to its association with the lower social classes. However, not being dominated by Brazilian instructors, the Mexican market has made it easier for some local capoeiristas to adopt the practice as a profession – as is often the case in Brazil. For some Mexican capoeiristas, capoeira has been seen as a professional practice that complements or replaces the educational or professional careers of its practitioners.

to the North in search of better opportunities. To a certain extent, it would account for a coloniality of the imaginary linked to the North-South divide, according to which the North is associated with ideas like 'future' and 'development' [see: Contreras Islas 2021: 64-65]. Regardless of its possible causes, this 'lack' might have contributed to:

b) The existence of strong 'independent' local groups

'Independent' groups are local (i.e., Mexican) groups which are not affiliated to Brazilian 'franchises' [Miller 2016] nor led by a Brazilian teachers. This does not mean that 'independent' groups have cut all relation to Brazil or to Brazilian teachers. On the contrary: most 'independent' groups regularly invite Brazilian teachers, and some of them have close bonds to one or more renowned mestres residing outside of Mexico. However, they do not become 'subsidiaries' of the Brazilian groups: they make their own decisions and carry out most of their work autonomously. The first independent group in Mexico was *Banda do Saci*, founded by Mariano Andrade in 1996. After *Banda do Saci* became an Angola group in 1998, some members broke away to form *Longe do Mar* – the first Mexican contemporânea group, today led by Mestre Cigano and Mestre Rosita. The autonomy of the 'independent' groups and the 'lack' of Brazilian mestres, in turn, might have accelerated the process of:

c) Cultural hybridization

Capoeira in Mexico shows more advanced processes of cultural hybridization than those reported in regions of the Global North [Joseph 2008b, Lipiäinen 2015]. This hybridisation ranges from the inclusion of *temazcal* ceremonies⁷ at capoeira events [González Varela 2019], to the composition of capoeira songs alluding to the Day of the Dead [Contreras Islas 2021]. A striking and eye-catching example of this hybridisation can be seen in the design of the *Longe do Mar* website banners, which freely combine Mexican folk art motifs with capoeira themes [Figure 1].

Finally, in recent years, the capoeira scene in Mexico has shown a tendency to organize:

7 A *temazcal* (from Nahuatl *temazcalli*, 'house where one sweats,' from *temaz*, 'sweat,' and *calli*, 'house') refers to a pre-Columbian ritual and, at the same time, a steam bath of medicinal and aromatic herbs used in the traditional medicine and daily life of the people of central Mexico.



Figure 1: Banner with Mexican folk art motifs, taken from the website of the capoeira group Longe do Mar [<https://capoeira.org.mx/>] on 10 July 2022.

d) Capoeira events with local guests

For Joseph [2008a], capoeira events can be seen as immersive experiences of an imaginary Brazil, re-created by local capoeiristas. Similarly, Miller [2016] has noted that assisting with local capoeira events is a relevant form of domestic apprenticeship pilgrimage for practitioners who cannot afford the costs of a trip to Brazil – as is the case for most Mexican capoeiristas. Furthermore, due to the ‘lack’ of Brazilian teachers, local capoeira events are the only chance for Mexican capoeiristas to train with Brazilian teachers. However, in the last decade, the Mexican capoeira scene has seen a growing tendency to organize events where the prominent guests are local capoeira teachers. Figure 2, for instance, shows the poster of one event organized by the Longe do Mar community in Tijuana, where the guest is a Mexican capoeira professor who leads the ‘franchise’ of a Brazilian group in Mexico City. The increase in such events may be due to several reasons. First, there is the growing number of Mexican capoeiristas who have become profes-

sores, contramestres and mestres in recent years [Contreras Islas 2021]. A second reason is economic, since the costs of hosting events with Mexican guests are lower, as there is no need to pay for international flights or guests who charge in dollars. Finally, the difficulty of planning international travel due to the coronavirus may also have accentuated this trend. For example, the uncertainty generated by the pandemic has been the main reason for Longe do Mar’s annual *Encuentro Nacional de Capoeira* (National Capoeira Encounter) to have only local guests at its 2021 and 2022 events.

Based on the four particularities, one can hypothesise that ‘traditional’ markers [Miller 2013] might play a lesser role in Mexican capoeiristas’ judgments about the authenticity of their instructors – at least in comparison to the European or North American context [see, e.g., Campos

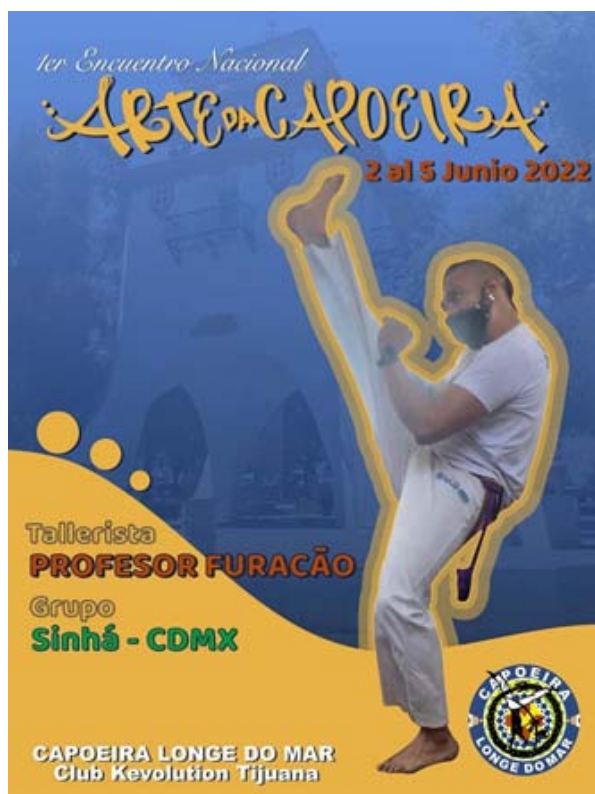


Figure 2. Promotional poster for the First National capoeira Meeting organised in Tijuana by the Longe do Mar community. Mexican Professor Furacão, head of the Grupo Sinhá headquarters in Mexico, is featured as a guest. Source: Longe do Mar social networks.

et al. 2010]. Consequently, the weight of ‘scientific’ and ‘charismatic’ criteria would be more significant. Among other factors [e.g., González Varela 2019: 119], this may have incentivized the professionalization of Mexican capoeiristas and the proliferation of independent groups such as Longe do Mar [Contreras Islas 2021]. To evaluate this hypothesis, we will begin by analysing the life stories of Rosita and Cigano becoming the first Mexican mestres.

BECOMING A MEXICAN MESTRE

Cigano and Rosita were pioneers in learning and teaching capoeira in Mexico City. When they began training in 1992 and 1995, respectively, neither had any clear reference point for capoeira, which they came to by chance while studying dance. For example, Cigano, recounting his arrival at Mariano Andrade’s workshop, recalls: ‘I had never seen capoeira before. The flyer showed something that had nothing to do with capoeira: it was an illustration of African dance. So, I signed up blind’ [Cigano, personal communication, Sept. 29, 2020].

However, the fascination he felt at that first encounter was enough to

make him the leading promoter of his teacher’s work. Cigano devoted himself to looking for places where Mariano could impart lessons or workshops. Likewise, he actively promoted his master’s courses among his social circle: ‘I hardly ever had a close friend who hadn’t gone to try a capoeira class’ [Cigano, personal communication, Sept. 29, 2020].

Rosita was introduced to capoeira by Cigano while working together in a dance troupe. However, she recounts that it took her a year to accept the invitation, mainly because ‘back then it wasn’t easy to access information about capoeira. There was no such thing as the Internet, like there is now, where you can Google it. And the word sounded like anything, like an exotic dish’ [Rosita, personal communication, Sept. 22, 2020].

Cigano’s and Rosita’s lack of reference points for capoeira may have prevented them from evaluating the work of their master (who was neither black nor Brazilian) based on stereotypical criteria. In retrospect, however, the mestres make certain judgments about the ‘authenticity’ of the capoeira they practised back then. For instance, Cigano recalls his first roda saying that ‘it became a very strange thing that must have had nothing to do with capoeira’ [Cigano, personal communication, Sept. 29, 2020].

That first experience with ‘inauthentic’ capoeira did not discourage Cigano. Far from it, it motivated him to accompany his master to the First International Capoeira Encounter organized by Mestre Acordeon in San Francisco, California. During this apprenticeship pilgrimage, he became friends with Mestre Ombrinho and Mestre Cabello. He states that talking with experienced capoeiristas enriched his experiences at Acordeon’s event. Furthermore, their friendship opened doors for him to continue navigating the social field of capoeira. For example, Cabello introduced him to Mestre João Grande, who Cigano then visited in New York. The latter is a clear example of the cycle of legitimacy acquisition described by Miller [2016: 44] being fulfilled.

Cigano’s and Rosita’s dance training may have helped them acquire charismatic forms of movement, increasing their visibility within the social field of practice. Simultaneously, learning capoeira movements and techniques helped them stand out in the dance scene. Thus, a positive feedback loop emerged in which the practice of capoeira is presented as ‘something worth continuing to do’ [Cigano, personal communication, Sept. 29, 2020].

Despite this, neither of them had the goal of becoming capoeira mestres. On the contrary, as Rosita says, such a goal was ‘totally out of their imaginations’ [Rosita, personal communication, 22 September 2020]. If anything, their goal was to build a community:

My dream was to have a capoeira community where I could do capoeira and share what I liked and how I wanted to do capoeira. I always worked for a community. I never worked for myself to work my way up through the ranks or anything like that. [Rosita, personal communication, 22 September 2020]

Ironically, this focus on having a community to practice with, may have

helped Rosita and Cigano to become mestres:

I felt that it was more of a recognition for my capoeira community than for me. I felt that making me a *mestra* was an endorsement of all the community's work; that it was more of a recognition for the community than for me personally. [Rosita, personal communication, September 22, 2020]

Miller [2016] has identified this orientation toward community rather than personal growth as another of the charismatic markers that help foreign capoeiristas gain legitimacy in capoeira Angola. The life stories of Rosita and Cigano suggest that this might hold for capoeira contemporânea as well.

In Cigano's case, this intention to validate the community is even more evident, as Mestre Acordeon explicitly stated his intentions to make him a mestre to prevent a possible affiliation of Longe do Mar with an international capoeira 'franchise':

Mestre Acordeon, who has been visiting us for several years, tells me: 'They're telling you all these things because they're going to want you to affiliate, [but] I think you should stick with your project ... Because they're going to impose their ideas on you, and I'm going to see you doing the same capoeira that I see everywhere, which is not worth it. I'd rather give you a degree in capoeira that gives Longe do Mar legitimacy'. [Cigano, personal communication, 29 September 2020]

By making Cigano a mestre, Mestre Acordeon wanted to protect and legitimize the innovations of Longe do Mar, which has a long history of generating original plastic, scenic and musical work inspired by capoeira [Contreras Islas 2021]. However, Cigano reflects how making him a mestre was also a way to put a limit on those innovations:

In a way, [Mestre Acordeon] has recognized our adventures and has always been very optimistic and has encouraged us to do *maculelé* and *puxadas de rede* that have nothing to do with the folkloric choreographies of Bahia. But, on the other hand, he insists on our role as preservers. So, my role is not just as a contemporary artist but as a museum curator. [Cigano, personal communication, 29 September 2020]

This tension between innovation and tradition is characteristic of capoeira; however, it works differently in each style. For example, while practitioners of capoeira Angola tend to be more traditionalist, De Brito [2016] points out the tendency of practitioners of the regional style to receive innovation with enthusiasm.⁸ One might even add that in this case, this seems to be part of the criteria that drives Mestre Acordeon to legitimize the work of the Mexican mestres. No similar situations were reported in Miller's work, perhaps because her research focused on capoeira Angola. The capoeira practiced at Longe do Mar, however, does not strictly belong to either of these two styles but is part of what Assunção [2005] calls capoeira contemporânea, an eclectic style developed mainly in the cities of São Paulo and Rio de Janeiro beginning in the 1970s. Mestre Acordeon could be considered one of the most important representatives of this style, even though he was a student of Mestre Bimba (creator of the regional style). So one might wonder whether innovation could be a charismatic marker of authenticity specific to the fields of capoeira regional and contemporânea.

To this extent, the stories of Rosita and Cigano broadly corroborate Miller's thesis about the process of acquisition of legitimacy by people who lack stereotypical markers of authenticity. The strategy of the first Mexican mestres was based on the incorporation of charismatic cultural capital that gradually crystallized into scientific markers of authenticity. The proximity to Brazilian mestres such as Cabello, Ombrinho and Acordeon has played a fundamental role. Another critical factor has been the constant openness to exchange with the international capoeira community by organizing and participating in events. However, it might be relevant to point out that this exchange has taken place mainly (though not exclusively) with mestres based in the United States – thus making apprenticeship pilgrimages to Brazil secondary.

In this regard, Cigano comments: 'one can either go to Mestre Acordeon's academy, for example, in Berkeley, or to Mestre João Grande's academy in New York, or to Israel to train with Edan, who also seems to have an incredible experience. So, there is no single pole' [Cigano, personal communication, 29 September 2020]. Cigano's is an interesting observation. It speaks to a possible change in Brazil's status as the quintessential destination for apprenticeship pilgrimages as globalization of capoeira advances. This change would generate new destinations or 'poles' for local or regional pilgrimages, as described by Miller and

8 Historically, this tension originated in the first half of the 20th century, framed by Getúlio Vargas' nationalist project. In this context, Manoel dos Reis Machado, better known as Mestre Bimba, introduced a series of reforms to the capoeira of his day to make its teaching more accessible and to professionalize the mestre's craft. These reforms contributed to Vargas' recognition of capoeira as a national sport and its legalization in the 1950s. However, some intellectuals and capoeiristas of the time accused Bimba's project of 'whitewashing' capoeira. Accordingly, they set about rescuing and codifying the style previous to Bimba, which they called capoeira Angola. In that context, 'Capoeira Angola remained 'traditional' capoeira by way of a claim to African cultural heritage, while capoeira Regional was linked to the notion of 'modernity' [De Brito 2016: 98]. Within this dichotomy, however, there are nuances. Particularly since the birth of capoeira contemporânea, one can speak of traditionalist tendencies in capoeira Regional, for instance, in groups that actively seek to maintain the style taught by Mestre Bimba (e.g., Filhos de Bimba). Likewise, capoeira Angola has varying degrees of openness to innovation, as noted by González Varela [2019].

Marion [2018]. In this sense, it is remarkable that Cigano and Rosita preferred to send their first generation of *contramestres* to train in Berkeley with Mestre Acordeon rather than on an apprenticeship pilgrimage to Brazil. However:

After that *formatura*,⁹ [mestre Acordeon] told me that he wanted the next *contramestres* to be trained in Mexico because he did not want to give the impression that he had to train our people. Instead, he wanted Longe do Mar to train its own people. [Cigano, personal communication, 29 September 2020]

This gesture on the part of Mestre Acordeon once again attests to the legitimacy he accords to the work done by these Mexican *mestres*, and the impact that the training of non-Brazilian *mestres* can have on the global dynamics of mobility in the capoeira field.

Another important factor that does not figure in Miller's considerations is the value of 'independence' and 'innovation' as possible markers of authenticity. According to our interviewees, Mestre Acordeon granted Rosita and Cigano the degree to legitimize their community's work and to prevent it from being taken over by international groups. The latter is interesting, for it is poetically reminiscent of capoeira's origins as a resistance struggle, in this case, the resistance of hybrid cultural forms to the pressure to affiliate with Brazilian 'franchises'. The title of *mestre* becomes a resource to maintain this 'independence', reproducing the tension between tradition and innovation that characterizes the dynamics of capoeira.

BEING A MEXICAN MESTRE

One might ask how a foreign capoeirista's experience changes once they have earned the 'ultimate marker of authenticity'. In this regard, Cigano points out:

At least in San Francisco, if I gesture that I'm going to take an instrument, they give it to me. Immediately. [...] In the games, unless the others are *mestres*, I put my hand on the one in front of me, and I'm in. [Cigano, personal communication, 29 September 2020]

From such experiences, Cigano concludes that 'the legitimacy in the eyes of the tribe is totally real' [Cigano, personal communication, 29 September 2020]. When asked about the basis for such legitimacy, he commented:

I think it may have to do with the degree of respect in the community for the teacher who trained me. Perhaps to disrespect someone nominated *mestre* by Mestre Acordeon is to disrespect Mestre Acordeon. [personal communication, 29 September 2020]

9 A public ceremony where one or more capoeiristas obtain the title of *contramestre* or *mestre*.

Cigano's narrative coincides, thus, with Miller's observations. However, Rosita's experience is different. On the one hand, she acknowledges that she was invited to 'events where she had never been invited'. But on the other hand, she perceives that she has to 'struggle a little bit' to validate her position as a capoeirista. For example, she pointed out that it is not so easy for her to get a place in the *bateria* (the musical ensemble) or the main voice to sing in the *roda*. She adds that this experience is persistent 'at events that are not in her community', and being a *mestra* has not improved it.

When asked to describe further the experience of 'struggling a little bit', Rosita noted: 'sometimes it's very tiring, because sometimes I'm already exhausted... But I have to go play because no other woman is playing, or I have to sing because no other woman is singing' [Rosita, personal communication, 22 September 2020]. Note how the interviewee emphasized being a woman as a determining factor in the structure of this exhausting experience of struggle. Further on, Rosita emphasizes that this experience of 'struggling' has been a trait in her path as a female capoeirista, especially at events where most of the invited *mestres* and *contramestres* are Brazilian men. In other words: Rosita feels like she has to play because no other women are playing, like she has an obligation to represent her gender within the male dominated field of capoeira. Rosita accepts that, to some extent, this 'struggle' is part of a self-imposed attitude, which she has consciously adopted since she began practicing capoeira.¹⁰ Therefore, it was part of her experience with the practice long before she became a *mestra*. However, after receiving the title, she feels it 'a little bit stronger, like a responsibility' [Rosita, personal communication, 22 September 2020].

This gender-differentiated treatment may reflect the patriarchal structure that still pervades capoeira. Other authors [Joseph, 2012; Guizardi & Ypeji 2016; Owen & Ugolotti 2019] have documented the difficulties of women gaining recognition within the social field of capoeira. According to Miller [2016], this could relate to the stereotypical image of the capoeirista being a heterosexual man [see also Stephens & Delamont 2014]. However, Rosita's case questions the status of a *mestre's* title as the 'ultimate marker of authenticity'. At least in her case, gender seems to outweigh it. In any case, the title of *mestra* has resignified Rosita's experience of struggle as a responsibility to other women capoeiristas.

FINAL REMARKS

The life stories of the first Mexican *mestres* largely corroborate Miller's observations regarding the strategies non-Brazilian capoeiristas use to achieve legitimacy. When stereotypical markers are absent, this process operates as a positive feedback loop between acquiring charismatic and scientific markers of authenticity.

The comparison between Rosita and Cigano also confirms that acquiring legitimacy is more difficult for those who are farther away from the stereotype of the 'authentic' capoeirista. In Rosita's case, this situation

10 The interview does not clearly state her motivation for adopting such an attitude, but it could be interpreted as a quest for fairness or justice. She mentions, for example, how tiring it is to 'fight' for a position 'that anyone [in the community] should have an equal chance of attaining' [Rosita, personal communication, 22 September 2020].

is reflected in a constant struggle to position herself as a legitimate mestra. Furthermore, her struggle is compounded by a feeling that she is fighting for other female capoeiristas in the capoeira community. Therefore, one could ask whether Rosita's struggle could be relevant for other non-stereotypical capoeiristas, regardless of gender. For example, do gender-diverse Brazilian and foreign capoeiristas with high scientific markers of legitimacy experience a struggle and a sense of responsibility similar to Rosita? How do these experiences change across the North-South divide? And what could their experiences tell us about authenticity and legitimacy in the capoeira field?

A remarkable difference from Miller's observations would be the role of the independent work of a capoeira community in achieving legitimacy. According to Cigano, one of Mestre Acordeon's motivations for making him a mestre was that he did not want to 'get to see a capoeira that you see everywhere else' [Cigano, personal communication, Sept. 29, 2020]. The latter is fascinating considering the tension between tradition and innovation that has marked discussions around authenticity within the practice [De Brito 2016] and invites further examination of innovation as a possible charismatic marker of authenticity among regional and/or contemporânea groups. In this sense, one might ask, for example, whether this appreciation of innovation is common in other mestres of the styles mentioned or is more a personal tendency of Mestre Acordeon.

Another interesting difference from Miller's [2016] results derives from Cigano's observation of a globalized field where Brazil is no longer the 'only pole' for apprenticeship pilgrimages. Accordingly, one might imagine the emergence of new practice centres that appeal to capoeira enthusiasts outside Brazil. In Cigano's estimation, such centres already exist. While I doubt that the new 'centres' will never replace Brazil (particularly Bahia) as capoeira's equivalent to 'Mecca', they might change the dynamics of mobility and tourism in the capoeira field. With this in mind, it might be interesting to develop a typology of the different 'centres' or 'poles'.

Following Miller and Marion [2018], the emergence of these new 'poles' could be related to different types of apprenticeship pilgrimages. Based on a vast corpus of ethnographic data on various body practices, they develop a typology including local, regional, major, opportunistic, and even virtual pilgrimages. Furthermore, they provide at least three general reasons why practitioners undertake such pilgrimages:

1. To access a higher level of education than is available locally
2. To understand the culture in which their practice originated and to test their skills with local practitioners in the practice's homeland
3. To increase their cultural capital or acquire markers of legitimacy (e.g., certificates)

Finally, the authors point out that 'the exact role and configuration of apprenticeship pilgrimage will be different in each social field' [Miller

& Marion 2018: 150]. Miller and Marion's analysis, however, does not explain how specific new 'poles' arise, why some rise to prominence, or how these processes affect the overall community of practice [cf. Miller & Marion 2018: 154].

How does a specific destination (whether local, regional, or virtual) become 'attractive' to capoeiristas? Here are some conjectures based on my exploration of the situation of capoeira in Mexico and the particular experiences of Rosita and Cigano. For example, some 'poles' could become 'attractive' due to a legendary mestre settling down there (e.g., Mestre João Grande's academy in New York). Such 'legendary poles' would be attractive to most capoeiristas, regardless of style and group affiliation, and become 'poles' for major pilgrimages. (In fact, the academy of Mestre João Grande is an attractive destination for American or Mexican practitioners, many Europeans, and even Brazilians themselves). In contrast, other destinations might appeal specifically to practitioners of certain styles (e.g., Mestre Acordeon's academy in Berkeley for regional and contemporânea practitioners) or members of certain groups (Mestre Chuvishinho's academy in Boston for Sinhá members). Other 'poles' would attract people interested in acquiring 'certifications', like Mestre Edan's professionalization courses in Israel and Europe.¹¹ Given that such certification and professionalization practices are not widespread in Brazil, they are attractive to capoeira teachers in those regions but also 'major' or 'opportunistic' pilgrims in the sense of Miller and Marion [2018]. Studying how these different poles emerge, consolidate, and diversify could be a subject for future research.

Finally, I would like to point out that Mexico has entire generations of professores and contramestres, who have never been to Brazil, and were trained exclusively by non-Brazilian mestres. As far as I am aware, there is no literature in the field capoeira studies that reports a similar case – though they might probably exist, for instance, in Israel. I believe that analysing the life stories of these generations of capoeira practitioners could open up new perspectives on how the dynamics of authenticity and legitimacy evolve. It may also shed light on aspects of capoeira's globalization process that have been little explored.

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¹¹ Mestre Edan, of Israeli origin, is known in the capoeira contemporânea scene for offering annual practical courses for masters in Europe and Israel. A promotional video of these courses is available on YouTube at the following link: <https://youtu.be/QmJpwrCAGbw>

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'SOFT' AKA SECOND INTENTION OFFENCE?

THE CONCEPT OF 'HARD' AND 'SOFT' IN THE FENCING THEORY OF THE MING DYNASTY FENCING TREATISE, JIAN JING

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ABSTRACT

The 16th century Chinese fight book *Jian Jing* 劍經 (Sword Treatise), written by the Ming dynasty (1368–1644) general Yu Dayou 俞大猷, is the oldest available comprehensive work on Chinese fencing theory. This paper argues that the treatise uses the terms *gang* 剛 (hard) and *rou* 柔 (soft) as technical terms to label tactics what are known as first and second intention offence in modern sport fencing. The terms hard and soft became widely used from the late 17th century onward by practitioners of the so-called 'internal schools'. Since then the terms hard and soft have remained part of Chinese martial arts vocabulary. However, this use of this pair of terms in the field of military culture goes further back, to the military classics of ancient China. This paper presents a few examples of how ancient Chinese military culture included these terms in its specialised vocabulary, and argues that these words are used as technical terms of martial vocabulary in Ming dynasty fight books, and imply neither a Daoist philosophical background nor a direct Daoist influence on the documented martial arts. It then discusses the key concepts of Yu's fencing theory, including how his system propagates second intention offence instead of first intention actions, and how the terms 'soft' and 'hard' may label these two tactical approaches in his treatise.

INTRODUCTION

The 16th century Chinese fight book¹ *Jian Jing* 劍經 (Sword Treatise) uses the terms hard (*gang* 剛) and soft (*rou* 柔) to label technical terms of fencing theory. Hard and soft are also well-known terms among contemporary practitioners, researchers and scholars of Chinese martial arts. They are used to classify martial arts styles and systems based on their attitude towards the application of physical force and self-cultivation practices. According to popular definition,² soft styles – often referred to as ‘internal styles’ or ‘internal schools’ (*neijia* 內家) – favour longevity practices and the cultivation of the mind, which, as practitioners claim, can lead to martial prowess. Hard styles or ‘external styles’ (*waijia* 外家) primarily rely on the strength and speed of the body. Practitioners of external schools train to develop physical abilities to become more effective fighters. Another popular contemporary way to explain the difference between hard and soft martial arts is to describe hard styles as the ones that apply strength and soft styles as those that use the strength of the enemy against them [Wilson 2017], however this interpretation exceeds the scope of Chinese martial arts culture.

Such categorisations of Chinese martial arts usually draw upon some sort of unspoken philosophical assumptions. Modern Chinese martial arts practices often include self-cultivation and spiritual aspects [LaRochelle 2013: 2] that rely on the teachings of Daoist and Buddhist philosophy. However, based on the research of Stanley Henning [1994] Peter Lorge [2012], Dominic Larochelle [2013], and other scholars, there seems to be a consensus among experts of the field that the Daoist origin of internal Chinese martial arts is a somewhat modern myth, which had been created in the 17th century and became widespread during the 19th [Bowman 2012: 18] and 20th century. The claims about the Buddhist origins of Chinese martial arts also mostly fall into the legend category, and were invented after the 17th century [Shahar 2008].

Considering these findings, if we do look for philosophical or religious content in *Jian Jing*, but try to understand the meaning of hard and soft as terms of fencing theory, we see that these words most likely label tactical approaches that can be found in several fencing systems from different places and ages around the world. These approaches are called first and second intention offence in modern Olympic sport fencing. First intention tactic means starting the fight with a direct, committed attack to hit our target with our first action. In second intention tactic “a fencer executes a convincing, yet false, action in hopes of drawing a true, committed reaction from their opponent.” [USA Fencing 2022] As we will see through quotations from the source, Yu’s fencing system highly relies on the latter, and bases its whole theoretical focus on the time and timing aspect of fighting. Also, understanding hard and soft as names of tactical approaches help us to understand other seemingly obscure terms in Yu’s treatise, leading to a better understanding of the whole theoretical background of his martial art.

1 The term *fight book* was originally created for the field of historical European martial arts research [Jaquet, Verelst and Dawson 2016] but it also suits Chinese works of the same genre.

2 This kind of division of Chinese martial arts into soft and hard schools, and their definition, was first laid down in the *Epitaph of Wang Zhengnan* (Wang Zhengnan Muzhiming 王征南墓志銘) by Huang Zongxi 黃宗羲 (1610-1695) in 1669. For more information about the relevance of this source see [Lorge 2012: 192].

English translations of Chinese texts in this paper, if not indicated otherwise, are made by the author.

THE TERMS HARD AND SOFT IN CHINESE MILITARY CULTURE

The words hard and soft as specialised terms in a written work of a field of culture first appear in the essential classical text of Daoism, the *Daodejing* 道德經. The well-known passage from the 78th Chapter reads: ‘The soft overcomes the hard, the weak overcomes the strong’ [Legge 1891]. These terms were also introduced to Chinese military literature as early as between the 6th and 3rd century BCE in *The Art of War* (*Sunzi Bingfa* 孫子兵法) [Sawyer 1993: 276]. We also find several occurrences of hard and soft in other classics of the Chinese military canon. The *Wuzi’s Art of War* (*Wuzi* 吳子) [Sawyer 1993: 323] and *The Three Strategies of Huang Shigong* (*Huang Shigong San Lue* 黃石公三略) [Sawyer 1993: 423; 424] both use these terms to label different thoughts and concepts, but in different contexts from work to work [Sawyer 1993; Ringo 2001]. What is important, though, from the aspect of hard and soft’s occurrence in Ming martial arts manuals is these terms had been already used in military works of the past, and were well-known in Chinese military culture, even if their meaning changed through contexts and ages.

In the later period of the Ming rule in the 16th century we see hard and soft becoming parts of Chinese martial arts terminology for the first time in the fencing system of *Jian Jing*. *Jian Jing* is a fencing manual that contains a complete and comprehensive weapon-based martial arts system. This work is unique among other Ming fight books in the sense that it is not only a collection of techniques and instructions like most of its contemporary counterparts, but includes descriptions of theoretical concepts about fencing.

JIAN JING AND MING DYNASTY FIGHT BOOK TRADITION

Jian Jing was written by Yu Dayou 俞大猷, a Ming general who gained fame by fighting the infamous *wokou* 倭寇 pirates. The treatise has been preserved in the military manual *Xu Wujing Zongyao* 續武經總要 (*Continuation of the Complete Essentials for the Military Classics*) [Yu & Zhao 1557] authored by Zhao Benxue 趙本學, a scholar from Fujian who mentored Yu. Yu wrote the last chapter of the eight-volume work, which contains *Jian Jing*.³ The famous Ming general Qi Jiguang also compiled Yu’s fencing treatise into his military encyclopaedia, the *Jixiao Xinshu* 紀效新書 (*On Military Preparation*) [Qi 1782], published in 1580. *Jian Jing* was included in the chapter⁴ discussing close-quarters combat. Despite the word ‘sword’ in its title, *Jian Jing* teaches mostly staff fighting techniques. Yu claims that long staff fighting is the basis of all weapon-based combat, and everything learnt with it can be applied

3 There is a popular misconception that the *Jian Jing* was originally a chapter of a larger work of Yu Dayou entitled *Compilation of Vital Energy* (*Zhengqi Tang Ji* 正氣堂集). In fact, the *Compilation of Vital Energy* was created after the death of Yu Dayou from all of his collected literary works including treatises, letters, and poetry. The title was also given by the editors of the compilation.

4 Chapter 12. About the Long Use of Short Weapons (Duan bing chang yong shuo 短兵長用說) (Qi 1782: 12ch).

to sword and polearm fencing. The treatise consists of mnemonic verses about basic body posture and fencing theory, a trident solo drill and detailed descriptions of fencing plays arranged into 154 paragraphs. *Jian Jing* is considered a prominent work of the Chinese fight book tradition and has been a reference point for the practitioners of Chinese martial arts in the last three centuries up to the present day.

According to our current knowledge, there are no surviving comprehensive Chinese martial arts manuals written before the 16th century. Although we have mentions of now lost martial arts sources in earlier catalogues, it seems that the fashion of writing fight books did not exist in China before the late period of the Ming dynasty. For a list of Ming dynasty martial arts authors and sources, see [Li 2018: 52–74]. The appearance of this new genre was in accordance with a larger scale of cultural changes. With the radically growing Ming population, the amount of educated, literate people has also increased. This created a larger demand for books in general [Wang 2003: 18]. In the 14th and 15th century, it became a custom for professionals of different fields to write treatises and books to present and document their knowledge. This tendency has shortly appeared in the field of military and martial arts as well.⁵ Military officers started to write manuals and encyclopaedias encompassing all the knowledge they considered important in their field of profession, including martial arts systems [Lorge 2012: 159]. The early Chinese fight books were created as parts of chapters in military encyclopaedias dealing with the training of soldiers.

The military context of these fight books really shows itself in the pragmatism the authors treated martial arts with. Martial arts systems recorded in the military encyclopaedias are mostly compilations of techniques collected from several different traditions. The intention of the authors was to put together simple and effective systems which suit the military application. It is very similar to how Krav Maga was compiled from techniques of several martial arts to meet the needs of modern military combatives and self-defence [Schaflechner 2021: 111–12].

We do not know if civilian martial arts practice of the Ming era had any philosophical, religious, or esoteric elements similar to the ones we usually find in modern martial arts culture. Ming dynasty fight books written by military professionals do not have such content, which might be the result of their pragmatic military approach.⁶ We also have a few Ming fight books by authors who were not professional soldiers, therefore the martial arts recorded by them are conventionally categorised ‘civilian’ [Li 2018: 65]. The most well-known works of this category are Cheng Zongyou’s 程宗猷 *Gengyu Shengji 耕餘剩技 (Skills Beyond Farming)* [Cheng 1621] and Wu Shu’s 吳旻 *Shoubi lu 手臂錄 (Record*

of Arms) [Ren 2016].⁷ Both works are compilations of fighting systems with various weapons, such as lances, polearms and two-handed swords of Japanese influence [Cheng 1621: 68b]. These works, in their layout and style, are very similar to fight books written for the military. They seemingly followed the already established publication standards of the era [Wang 2003: 5]. This similarity is also true for their content: they only contain technical information of martial arts. Even Cheng’s fight book documenting Shaolin staff fighting does not have any religious or philosophical material. Therefore, in light of available data, we can cautiously suppose that Chinese martial arts were not as interwoven with philosophical and religious content as we know them today. However, we have a very small corpus of martial arts sources from the era, so it is not unlikely that there have been Ming schools or folk martial arts communities with a stronger emphasis on religious or esoteric elements that we do not know of. However, available Ming fight books only discuss the technical aspects of martial arts, making them very similar to most late medieval and early modern European fight books.

HARD AND SOFT IN MING DYNASTY MILITARY FENCING TERMINOLOGY

The terms hard and soft can be found in the mnemonic verses section of *Jian Jing* as terms that are parts of a basic tactical doctrine: ‘[Be] hard before the force of the opponent, [but] softly take advantage of his passed force’⁸ [Yu 1782]. We do not know exactly when Chinese martial artists started to use this pair of terms to name concepts of their art, but this is the first time we can find them in the vocabulary of a Chinese fight book. It is possible that Yu Dayou was the first one to use hard and soft in martial arts teachings, but according to the long history of the term in Chinese military culture, it is likely that their usage had been in vogue for some time among martial artists. It is possible that the quoted doctrine had been well-known among fighters of the period, spreading orally from master to pupil, and Yu was merely the first one to write it down.

The manner how *Jian Jing* uses hard and soft to name concepts of a specialised field, in this case fencing theory, is not unique. It tries to draw upon the common cultural embeddedness and familiarity of these words to label otherwise complex terms of theory. As Guy Windsor defined the meaning of fencing theory: ‘[it] is the intellectual, abstract structure that fencers use to describe, define, and explain their art’ [Windsor 2018: 37]. As simple as it sounds, in reality it is quite challenging to find the correct words to describe the theory behind the mechanics and the tactical mindset of a martial arts system. It is a clever practice to choose terms descriptive enough that they are easily memorisable and

5 The Song dynasty (960–1279) military compendium *Wujing Zongyao 武經總要 (Complete Essentials for the Military Classics)* preceded Ming military encyclopaedias, the genre, however, has not become popular and widespread before the second part of the Ming rule. The Song compendium does not contain fighting manuals or fencing treatises, this is a feature that only seems to appear in Ming books of the genre.

6 It tells a lot about the pragmatic nature of pre-Qing Chinese martial arts culture that the most important measure of martial prowess was sheer physical strength [Lorge 2012].

7 Ren’s book contains Wu’s original text and a detailed, contemporary interpretation of his treatise in Chinese.

8 剛在他力前，柔乘他力後。

do not need a lot of additional explanation from the instructor. Because of the limitations of the written medium,⁹ finding the right terms that invoke the right connotations in the audience is especially important when writing a fight book. Martial arts masters from different times and places all had to face this same problem, and they often came up with similar solutions. They borrowed terms with a similar meaning or connotation from other, commonly known fields of culture to name their abstract theoretical concepts.

This is the same logic behind the choice of the terms *vor*, *nach*, *indes* in the medieval German fencing tradition of Johannes Liechtenauer [Anonymous 1389]. The three simple words of everyday language basically mean *before*, *after* and *meanwhile*,¹⁰ but they cover complex concepts about the timing of techniques relative to the opponent’s actions. Salvator Fabris did the same when he borrowed the term *tempo* from Aristotle and used it to name the amount of time in which one movement can be done in fencing [Rutherford 2018]. The well-educated renaissance gentleman – the aimed audience of Fabris – was familiar with the philosophical concepts of Aristotle, therefore had no problem understanding the author’s intentions.

In the choice of using hard and soft as terms of fencing theory, the same logic can be observed. Neo-Confucianism, the prominent ideology of the Ming literati [Bol 2003: 242], has already incorporated several canonical Taoist texts during the Song dynasty (960–1279), and syncretised their concepts into its own philosophical system [Levine 2009: 611]. As the *Daodejing* was one of these incorporated works, it is a logical assumption that the concepts of hard and soft have also become parts of Ming literary culture through Neo-Confucianism, and were familiar terms for the educated gentlemen of the period. As described above, these two terms have also been part of the Chinese military vocabulary since antiquity. To become an officer in the Ming military a candidate had to pass military exams. On these exams, among others, a thorough knowledge of the Chinese Military Classics was expected [Mote and Twitchett 2008]. Candidates were also required to be well-versed in the Neo-Confucian ideology and literature [Miyazaki 1981]. Hence, we can safely suppose that the average officer of the era knew and used the terms hard and soft as parts of both the literary and military vocabulary. Therefore, professional soldiers, the primary audience of the fight books, could be familiar with these concepts.

On the other hand, the choice of words – together with the versified form – also perfectly suited the task of training common soldiers with easily memorisable oral instructions. Hard and soft, as simple words of everyday language, were easy to understand and memorise. As abstract

Daoist concepts, they were also deeply embedded in common culture [Ownby 2003: 226; Berling 1998: 986], so the everyday person supposedly could have no problem associating these words with something complex that cannot be described with a few simple words. Despite Neo-Confucianism being the favoured ideology of the Ming literati, Daoist religion enjoyed the support of several Ming emperors [Taylor 1998: 878], who carefully tried to maintain the balance of power among the three prominent ideology of the era: Neo-Confucianism, Daoism and Buddhism. Taoism also had strong roots in local communities. Taoist temples often enjoyed the support of local leaders and common lay believers alike [Berling 1998: 959]. Simply put: Taoist culture was part of the everyday life during the Ming. Furthermore, as LaRoche argues, ‘Chinese cosmology generally encompasses all aspects of Chinese life, from birth to death and beyond. It is thus not surprising that martial arts practitioners rely on those concepts to make sense of their practice’ [LaRoche 2013]. For example, if common soldiers heard the term soft from their training officer in a martial arts training context, it invoked cultural connotations from a common culture in them. They could be familiar with the word, which therefore was not an abstract and somewhat elitist theoretical term for them. Considering all of the above, the choice of hard and soft to describe fencing theoretical concepts equally suited the well-educated and the common audience, the literati, the military officials and the simple soldiers alike.

The borrowing of terms from other fields to fencing theory was also not restricted to philosophy. *Jian Jing* uses the word *paiwei* 拍位, which is originally a term of music theory meaning the place of the beat in a song’s rhythm. Yu adopted this word to name another important theoretical fencing concept that I discuss in more detail in the following section.

SOFT AKA SECOND INTENTION OFFENSE

If we accept that *Jian Jing* uses hard and soft as terms of fencing theory and not as terms of Daoist (or any kind of) philosophy, let us have a look at what specific concepts can they refer to. The text reads as the following:

[Be] hard before the force of the opponent, [but] softly take advantage of his passed force. When he is busy, I am waiting calmly, the gentleman fights with the knowledge of the *paiwei*.¹¹ [Yu 1782]

I propose an interpretation¹² where ‘hard’ in this quote means that we

9 For more information about the limitations of knowledge transfer in fight books, see [Bauer 2016; Kleinau 2016].

10 For a detailed glossary of HEMA fencing terminology, see [The Association for Renaissance Martial Arts 2020]

11 剛在他力前，柔乘他力後。彼忙我靜待，知拍任君鬥。

12 In case of lost martial arts that have no continuous, living tradition we can never be absolutely sure about the meaning of special theoretical terms [Burkart 2016]. This is a problem most familiar for researchers of HEMA, but present in the research of any extinct martial arts. I consider Yu’s fencing system a lost art, similarly to premodern European martial arts. Because of the huge changes in Chinese martial arts culture during and after the Qing dynasty, there is no direct continuity between martial arts of the Ming era and today. Therefore, my interpretation here is based on the thorough study of the written source alone, and does not deal with contemporary martial arts styles’ interpretations of hard and soft.

take the initiative and start the action against our opponent. In this case, we must be as direct as possible and threaten them with our every movement to make hit. ‘Soft’ is the opposite of this approach. It is when we wait for or provoke the enemy’s attack, and then we react to it, taking advantage of the openings they created with their action. Starting an attack as a provocation, with the intention to force a reaction from the opponent and establishing an advantageous situation, but not aiming for a direct hit also falls into this latter category. These readings concur with the modern fencing concepts first and second intention offence.

There can be another reading of this quote, which at first glance seems more obvious, and more in line with contemporary interpretations of these terms [Wilson 2017]. The hard and the soft approach can both be understood as a type of defensive action against the enemy’s offense. According to this way of thinking, hard means a decisive and firm parry against the attack, while a soft defence is a way of diverting the attack away from us without directly opposing it with similar force. I argue, however, that hard and soft, at least in the fencing theory of *Jian Jing*, have much more to do with the time and timing aspect of tactical thinking rather than with the strength and method of parrying.

First, *qian* 前 and *hou* 後 in this passage in my understanding stand for *before* and *after*. If we try to interpret their meaning regarding parries, *after* might make sense, as a parry should logically come following the enemy’s attack, but there is no way I can make an effective parry *before* they attack me, as in this case, my intended parry simply becomes an empty movement that does not react to or obstruct any attack. *Qian* and *hou*, these two characters can also have the meanings ‘in front of’ and ‘behind’. In this case, our problem with the parry-based interpretation again will be that while ‘in front of’ makes sense regarding parries, as my weapon is in front of the enemy’s weapon and blocks its way, but putting my parry behind their weapon will not protect me, and in the best case results in a double hit, which is not acceptable in a self-defence or combative fighting situation.

If we interpret *qian* and *hou* in the context of primary and second intention fencing, however, the time-based meanings of these words start to make sense. With a first intention (or hard) tactic I start my committed offense *before* the enemy’s any offensive action, before they could use their weapon to effectively hit me (their ‘strength’). With a second intention (or soft) tactic I first open up their defence with a provocation, an intended opening or an uncommitted strike, to establish a situation where I take advantage of their attack, *after* they launched it. This is how hard and soft can be technical terms labelling timing-based tactical approaches.

Second, understanding what term *li* 力 means in the text helps us a lot in our effort to decipher the meaning of hard and soft as technical

terms. The word *li* basically means strength, and we can definitely find passages in *Jian Jing* where this word is used in its everyday meaning, for example, to discuss the role of the arms’ strength in blows, as in the 115th passage for example [Yu 1782].¹³ Let us look, however, at other passages, where *Jian Jing* uses *li* with an obviously different meaning:

He strikes downwards, I make a rising backhand cover, [then] I trick him into believing I make a downward blow, but in reality I do not strike, but wait for him to make a heavily committed upwards backhand cover, causing his strength (*li*) to pass, then I bind his staff and shave down.¹⁴ [Yu 1782]

This passage instructs the reader to make a feint in order to provoke a heavily committed reaction from the enemy. By making this empty covering blow, basically hitting the air, his *li* passes, as in that exact moment, the enemy loses his ability to hurt us, or to effectively cover our next action. His empty blow at that moment has already lost its momentum, and he cannot instantly make another action, nor has a strong structure yet to parry our next action – contacting and pushing down his weapon. Another passage basically repeats the same principle, but in a more general scope, without mentioning specific actions:

Wait for (the moment) when his old strength has already (*li*) passed, but his new strength has not been launched, then take advantage of that.¹⁵ [Yu 1782]

By analysing the previous two passages, discussing basically the same theoretical principle, one in a specific scenario, the other in a more general manner, we can infer that *li* here probably is not equal with the simple and literal meaning of strength. More likely it is a temporary quality of an enemy’s action, meaning its ability to have an effect in the fight. A blow, which has not been launched or a blow that is already on its way to its target has *li*, has potential to hurt the enemy or to make an effective cover. A blow, which has already reached its aim, has no momentum, nor the probability to be launched, so it has no *li*. Thus we can interpret the term *li* as a window of movement and time in an action, where the action is effective and has potential, momentum, strength or structure behind it. The importance of taking advantage of the enemy’s passed *li* is so fundamental to Yu’s fencing system, that he repeats this principle at several places around the treatise. He also states that the whole book’s essence can be summarised in this short principle:

The whole book can be summed up in these mere eight characters: take advantage of the moment when his old strength (*li*) has already passed, but his new strength has not been launched. So excellent, so excellent!¹⁶ [Yu 1782]

13 今之欲用力打人者，惟恐棍提起不高、打不重，蓋隻是有前手之力，無後手之功故耳！

14 他打下，我揭起，我哄他欲打下而實不打下，待他盡力揭起，力使過了，即趕他棍剃下。

15 待他舊力略過，新力未發，然後乘之，所以順人之勢、借人之力也。

16 全書總要，隻乘他舊力略過，新力未發八字耳。至妙至妙！

Waiting for and taking advantage of an enemy’s ineffective action or a disadvantageous position that has been established through our provocations is a key element of second intention offence. We can see that Yu considers this principle crucial for his fencing theory, and I hope I could convince the reader through the above argument, that *Jian Jing* labels this principle with the term soft. Therefore I argue that the soft approach and the second intention tactic described in the previous quotes mean the same fencing theoretical concept.

Third, as I will demonstrate it with several examples taken both from *Jian Jing* and other period fencing treatises below, Ming dynasty fight books dealing with sword fencing or general principles of fighting with short arms,¹⁷ put much more emphasis on the time aspect of fighting, than any other important elements of fencing theory. Dealing with the timing of actions relative to the enemy’s actions, using provocations, and the second intention approach are dominant components in the theoretical background of these weapon-based martial arts.

There are other passages in *Jian Jing* that also discuss and take side with the second intention approach. Our original quote about hard and soft continues as: ‘When he is busy, I am waiting calmly’. These few words are also very important as they put the application of the soft approach in a broader context. If we supplement this passage with Yu’s other thoughts about the time aspect of fencing, we get a coherent picture of this fencing system’s perspective of time and timing:

Who hits later achieves victory earlier.¹⁸
You should know this well, you can never injure someone with only one hit [...].¹⁹
Do not [aim to] hit the enemy in the first instance, only hit him in the second instance.²⁰ [Yu 1782]

All these instructions teach us that we should rather wait for the opponent to start the first action in a duel. But even if we take the initiative, we should not aim our first action as a fully committed attack, but as a provocation that creates an opening for our second, third or even fourth blow that will finally hit. This approach describes again the tactical concept which is called second intention offense in modern sport fencing.

Several other Ming dynasty ‘short arm’ fighting systems base the time-aspect of their fencing theory on second intention tactics. Cheng Zongyou’s two-handed *dao* manual, the *Dandao Faxuan* 單刀法選 (Selected techniques of the single dao), included in the *Gengyu Chengji*,

primarily discusses sword techniques against a spearman. Similarly to most Ming fight books, the treatise contains several short sequences of techniques with an illustration showing the initial posture for each, and calls these *shi* 勢 (meaning both the stance and the corresponding sequence). The third among these sequences, which Cheng calls ‘Head covering stance’²¹ gives instructions for a typical second intention offensive sequence:

In this [stance] open up the left side door / So the left side of the body is towards the enemy / to provoke him to come and stab with the spear / Horizontally block and open the spear with the dao / Then take a diagonal advancing step with the right foot / Put back the left hand on the grip to hold it with both hands / Then strike to death as you please.²² [Cheng 1621: 71b]

As we can see, Cheng clearly instructs the swordsman to intentionally make an opening as a provocation, and then to take advantage of the spearman’s attack into this opening. Due to the scope of a journal article I will not quote every stance from Cheng’s treatise, merely point out,²³ that the majority of these *shi* play out following the same principles that we see in the above quote: make an opening as a provocation, wait for the attack, and take advantage of it [Cheng 1621: 72–79]. The whole fencing system is dominantly based on second intention tactics, although Cheng does not use any of the related terms we find in *Jian Jing* for this. We see basically the same approach to time-based tactics in another *dandao* treatise, the respective chapter of the *Shoubilu* [Ren 2016: 261–292], and there are also similar provocations in the *dao* and shield treatise found in the 11th chapter of the *Jixiao Xinshu* [Qi 1782: 11ch 4a–8b]: ‘Diagonal stepping stance – this is for an incoming horizontal strike. The method of receiving it is stepping diagonally’²⁴ [Qi 1782: 11ch 4b]. And while we do not find mentions of the terms hard and soft in any other Ming dynasty fight book apart from *Jian Jing*, the tactical approach labelled soft in the latter seems to be a very widespread phenomenon in surviving Ming fencing manuals. It is clear that this concept is not limited to the fencing theory that Yu wrote down.

PAIWEI IN BETWEEN

Moving back to *Jian Jing* we find an important concept that does not fit perfectly into the second intention approach. The last thought of our original quoted passage, ‘the gentleman fights with the knowledge of

17 The *Jixiao Xinshu* – presumably following period categorization, as these two categories also appear in several other Ming military treatises – puts different weapons into two groups: long arms (*chang bing* 长兵) and short arms (*duan bing* 短兵). Everything shorter than a spear, including polearms, falls into the short arms category.

18 後發勝先實。

19 知此，決不可一發便要傷人 [...].

20 不打他先一下，隻是他第二一下。

21 埋頭刀勢

22 埋頭刀勢/此開左邊門戶 / 將左邊身體向敵/餌彼鎗割入 / 以刀橫攔開鎗/斜進右腳 / 換左手共持把 / 聽便砍殺

23 The information regarding the content of the *Dandao Faxuan* is based on an unpublished translation and analysis of the treatise which is part of my ongoing doctoral research.

24 斜行勢 此乃道來橫 受之法動偏

the *paiwei* also draws attention to the importance of timing, but from a different angle. As I already mentioned, this term originally means ‘the place of the beat’ in music, but Yu uses it to describe a time-based theoretical concept that falls between the hard and the soft approach. *Paiwei* is the term for a certain moment during the opponent’s action when it is possible to execute a technique called *dang* 當, which Yu considers the peak of the art of fencing and ‘indescribably wonderful’.²⁵ Yu wrote the following explanations about *paiwei* and *dang* in *Jian Jing*:

This *dang* character is like the place of the beat in songs, it is indescribably wonderful.²⁶ [Yu 1782]
When the *paiwei* is established in the middle, do not pull, shave, cover or [let your weapon] fall²⁷, just throw a thrust, and do it in a really tight manner.²⁸ [Yu 1782]

It seems like Yu here struggles a bit to give an exact explanation of *dang* and *paiwei*, but from the given instructions we can infer that the *dang* is a technique very similar to what the German fencers of the Middle Ages called *Absetzen* – a single, tight movement that is a parry and an attack at the same time. A narrow, straight blow, which intercepts the opponent’s weapon and hits them, all in one action. From here, it is not hard to conclude that the *paiwei* probably means the exact right moment during the opponent’s attack when we can safely carry out this technique. To reach again to medieval German fencing terminology, it is the Chinese equivalent of *indes*.

CONCLUSION

Several Ming dynasty weapon-based martial arts, recorded in fight books, possess complex theoretical backgrounds, which can be analysed and described with the appropriate methodology [Windsor 2018: 39–66; Somogyi 2020]. *Jian Jing* is unique among them as it directly communicates its theoretical principles. In most works, theory is buried in technical instructions and can only be inferred through systematic analysis. In *Jian Jing*, theory is directly told to the reader. Understanding its meaning is still quite the challenge for the modern reader though. We do not possess a large amount of knowledge that was trivial for the original Ming dynasty audience of the work. For a period reader, it was supposedly obvious that, by the terms hard and soft, Yu did not try to include Taoist teachings in his fencing system. For a modern reader, however, due to the large-scale changes in Chinese martial arts culture in the last centuries, and because of the obscurity of a four hundred year-old technical text, this is not trivial. When researching fight books of the past, it is important to leave behind our modern understanding of specific terms, and look at the source with a fresh eye. Martial arts are constantly changing cultural phenomena. What is true for terms of

modern Chinese martial arts culture was not necessarily true hundreds of years ago.

It is also important to try to understand concepts in old fight books through principles and rules that are generally true for every weapon-based system ever created. Laws of physics and human biomechanics are constant. Fencing theory is a tool to describe, understand and take advantage of these laws. Due to cultural and personal diversity, every martial arts system describes these laws differently and takes different approaches to utilise them, but at the core we find these constants that can help us to understand otherwise obscure technical terms. First and second intention tactics might be terms of modern sport fencing, but several historical fencing systems utilised the principles behind them. Yu also understood these principles through experience and labelled them with terms that suited his socio-cultural environment. In the case of Ming dynasty fight books, it is always important to look for technical concepts when the meaning of a term is unclear, for the misinterpretation of theoretical terminology as philosophical content can lead to false results. It is in our best interest to take into account that Chinese martial arts of the past have not necessarily been as interwoven with philosophical and religious elements as they are today.

25 妙不可言。

26 此當字如曲中之拍位，妙不可言。

27 Names of movements with the weapon.

28 中間有拍位，不用拔刺洗落，隻撒手殺，則又緊矣。

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SAFEGUARDING AUTHENTICITY VERSUS INNOVATIVE DEVELOPMENT: METHODS OF PROTECTING TRADITIONAL CHINESE MARTIAL ARTS

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ABSTRACT

This article uses semi-structured interviews with experts in the field to explore the conflict between the two main approaches to the protection of Chinese martial arts culture, defined as 'safeguarding authenticity' and 'innovative development'. The article aims to enhance the vitality and cultural heritage of traditional Chinese martial arts and discusses their safeguarding and development from the perspective of intangible cultural heritage protection. Studies indicate that if Chinese martial arts endure from generation to generation, it is necessary to adapt martial arts to the current laws of social and cultural processes. With an eye to improving the vitality of traditional martial arts culture while adhering to the inheritance of the core skills of traditional martial arts, this article advocates an innovative development mode that keeps pace with the times. The fundamental purpose of such an approach would be to enable the sustainable and healthy development of traditional martial arts.

INTRODUCTION

In today's rapidly developing modern society, traditional Chinese martial arts culture is facing a crisis of survival, with unique traditional boxing styles gradually decreasing. In officially organised martial arts competitions, all the combatants exhibit the same style. As Federico Lenzerini has said, 'the rich cultural variety of humanity is progressively and dangerously tending towards uniformity'. Since 2006, to avoid the extinction of diverse martial arts styles and preserve their cultural heritage, the Chinese government has included more than 70 martial arts items in five published lists of nationally representative intangible cultural heritage (ICH), including Yang-style Taijiquan, Chen-style Taijiquan, Shaolinquan, and Meihuaquan. Protection can ensure the long-term viability of intangible heritage within communities and groups [Gwervevende & Mthombeni 2023] and protection is immensely important for the continued development of traditional Chinese martial arts culture.

How should ICH be protected? This is a research issue of concern to scholars around the world. In China, academic circles have two main ideological approaches to the protection of martial arts culture. One is to advocate 'safeguarding authenticity' (坚守原真; sticking to the truth), and the other is to advocate 'innovative development'. Although both are aimed at protecting the continuation and development of the traditional martial arts culture, the two approaches are logically contradictory. 'Protection' refers to actions taken to maintain the survival of 'vulnerable content' and is intended to preserve and pass on the 'original appearance' of the ICH. In the new era of rapid development, however, cultural protection without vitality is difficult to maintain. To retain vitality, such cultural protection must be 'innovative' and innovation by definition implies change. This can also be seen in the relevant policies of the Chinese government on the protection of ICH, which not only advocates inheritance and opposes unauthorised changes in core skills and other traditions but also encourages the innovation and development of skills [Ministry of Culture and Tourism 2012]. Moreover, at the 2022 International Martial Arts Study Conference, a discussion on the theme of 'Martial Arts Cultural Protection' suggested that there was also a cognitive contradiction between Chinese and international academic approaches. Whether this contradiction is based on differences in linguistic understanding or cultures, the result is that a consensus is difficult to reach on the meaning of concepts. To paraphrase Jacques Derrida, we must strive to resist the desire to collapse differences into opposites, and in order to resolve the unnecessary cognitive contradictions brought about by such differences, we must first form consensus on the core concepts [Spivak 1990]. Therefore, from the perspective of traditional culture protection, this paper examines the two approaches toward protecting ICH to identify the specific contradictory issues with a view to providing new ideas for the protection and development of traditional martial arts in the future.

METHODOLOGY

In-depth interviews were the primary method of data collection in this study. This method provides a means of developing a deep understanding of scholars in relevant fields on the topic of traditional martial arts cultural preservation, allowing the authors to identify the details behind the different perspectives guiding their work and interpreting them on that basis. In addition to the interviews, a second important data source was provided by existing research evidence, including published academic papers and books. The use of semi-structured interviews is conducive to focusing on the research project and allowing respondents to fully express their views. The interviewees included scholars engaged in martial arts research¹ and folklore research. The questions concerned the appropriate methods for protecting martial arts culture or ICH. The intention was to obtain an understanding of the differing views of the scholars in two fields when they view the same phenomenon and to construct a personal understanding of this issue from the perspective of ICH protection. The ultimate aim was to propose research conclusions that are useful for the protection of traditional martial arts culture.

WHAT MARTIAL ARTS CULTURE SHOULD BE PROTECTED?

Martial arts are ultimately a skill and maintaining the authenticity of that skill is the core of protecting martial arts culture. Thus, the word 'authenticity' is a core term that traditional martial arts protection cannot avoid. However, the difference between English and Chinese contexts will lead to differences in understanding this word. Professor Paul Bowman has given an in-depth analysis of authenticity in his paper 'The Tradition of Invention: On Authenticity in Traditional Asian Martial Arts' [Bowman 2020].² Bowman recognises that any form of development necessitates creativity, that all entities and identities inevitably undergo continuous construction, and that authenticity is inherited on this basis; it is not a matter of whether a 'tradition' is 'false' or 'true' within a culture or context. Consequently, it is difficult to accurately grasp the meaning of authenticity (正宗性) in the context of Chinese culture and, specifically, within traditional Chinese martial arts culture. For Westerners, the image of traditional Chinese martial arts is derived from various forms of popular culture, such as movies, TV shows, commercials, music videos, and the Internet [Bowman 2015]. Westerners' understanding of authenticity tends to be materialised by calligraphy (书法) decorations, with racks of traditional weapons and practice rooms in which the portraits of ancestors are presented (Bowman 2020). Pierrick Porchet notes that 'apprenticeship of the art through the ritual of praying for a master to accept oneself as his/her disciple' (拜师学艺) is often seen by practitioners and institutions as a central feature of what is authentic and traditional in Chinese martial arts [Porchet 2022]. This recognition of authenticity, as generated through material

1 The martial arts are a discipline in China, belonging to the science of physical culture and sports under the designation 'the science of martial arts and ethnic traditional sports'. These scholars have been practicing martial arts for a long time, and they are also engaged in research into martial arts theory.

2 The Chinese version of this article was published in the *Journal of Chengdu Institute of Physical Education* (China) in 2021, with the Chinese title «亚洲传统武术“正宗性”的发明»; authenticity translates as 正宗性.

decoration and ritual means, resembles a blood relationship (血亲关系) since the experts (师父) and apprentices (徒弟) have a relationship based on inheritance, representing the 'authentic Shaolin' or 'authentic Tai Chi'. In ancient Chinese ideological traditions, the strength and continuation of this kinship tradition (血亲传统) is the worthiest of social foundations [Fairbank 1989], hence its extension into the expression of the relationship between *shitu* (experts and apprentices 师徒) in traditional martial arts. Even if there is no blood relationship, it takes on a generalised kinship form (泛血亲关系), namely, 'a teacher for a day, a father for life' (一日为师终身为父) or 'Within the four seas, all men are brothers' (四海之内皆兄弟). In a sense, the familial features of martial arts groups mean that the martial arts as a whole carry an idea of peace and harmony, rather than one of violence [Che & Chen 2020]. The network formed by this generalised blood kinship relationship is called *menhu* (门户) [Dai & Chen 2009]; in a larger framework, it has also become the martial arts community [Lyu & Zhang 2013]. Both the *menhu* and martial arts community are relatively stable, static, and traditional. Entering a *menhu* or becoming a part of a community is not an easy task; it requires a long process of identification. As this process of identification develops, the practitioner becomes more favourably inclined toward the authentic attribution of the martial art they have learned. This kind of identification derives not only from the recognition of practitioner by the *menhu* or community but also the recognition of *menhu* by the practitioner.

The above is an explanation of authenticity from the perspective of traditional Chinese martial arts culture, based on the relationship between blood relatives and the external manifestation of materialisation (such as the decorations in practice rooms and apprenticeship ceremonies). However, from the perspective of cultural protection, the 'falsehood' and 'truth' of traditional Chinese martial arts culture are more important, since truth is another interpretation of authenticity; truth is closer to the Oxford English Dictionary's interpretation of authenticity. The reason why 'truth' is more important in the context of cultural protection is that without authenticity (真实性), those external manifestations of materialisation completely lose their significance. A real-life case provides an example of this. Ma Bao Guo, claiming to be a master of Hunyuan Xingyi Taiji (浑元形意太极),³ was knocked down three times in a row by an amateur kickboxing enthusiast in just half a minute. Even so, he subsequently claimed through the media that his kung fu was so powerful that he was afraid he might hurt his opponent, and his remarks went viral for a short time, as an example of behaviour that Chinese people ridicule. Ma Bao Guo's martial arts hall and apprenticeship ceremony have all the external manifestations of authenticity, but the false 'skill' of his martial art undermines the whole edifice. When there is no foundation, no matter how beautiful the building is, it

is useless. This criterion of authenticity can be called the 'authenticity of skills', comprising the core of ICH (including the martial arts).

Although no traditions can develop without being supported by economic interests, the culture industry can provide a path of survival for disappearing traditions [Zhang 2017]. However, the pursuit of economic interests can easily lead to impure and false traditions and to the emergence of cultural fictions. In recent years, the Chinese martial arts have seen many people dare to call themselves the head of a *menpai* (school) in order to recruit more students and gain financially, causing many new styles to be fabricated (门派林立). They call themselves experts, especially in relation to 'challenges' (挑战) and 'appointments' (*yuejia*; 约架).⁴ This pursuit of authenticity (正宗性) has developed into a desire for the authenticity (原真) of martial arts understood in terms of combat (打), following the logic that returning to the war and battlefield origin of martial arts is the best indicator. Added to this is the belief that practices handed down from ancestors should be passed down according to their original appearance and should not be changed; to change a traditional martial art is to destroy it [Yu 2006].

As mentioned at the beginning of the article, this safeguarding of authenticity is one of approaches to the protection of martial arts culture. However, as Bowman points out: 'In the discourse of traditional martial arts, the term authentic or authenticity has connotations that can easily be taken to imply a kind of unchanging monocultural purity' [Bowman 2020]. In China, adhering to the protection of authenticity can easily fall into adherence to historical relics, insisting that the traditional martial arts should be passed down according to their original appearance, retaining the 'original and authentic' (原汁原味) martial art. Obviously, it is difficult to achieve the goal of returning martial arts to their historical roots. The Chinese martial arts originated from military warfare [Henning 1981], and for thousands of years they were a central feature of military practice [Lorge 2011]. It is obviously impossible to take the martial arts back to their origins in military combat in contemporary society, in which they function for self-defence and sports. The martial arts of today are not a strict continuation of the ancient skills but a modern phenomenon that took shape in the late 19th and early 20th centuries, as Wile [1996] clearly points out. The pursuit of a return to ancient skills led to the 'Xu-Lei Event'⁵ (徐雷事件). Xu understood the authenticity of traditional Chinese martial arts to refer to combat and regarded some fake authentic masters as representing the entirety of the traditional martial arts. Events like this are highly damaging to the protection and development of traditional Chinese martial arts culture.

The Chinese martial arts are part of the ICH of humanity. They represent a living cultural heritage that will change over time, and this change means that 'old' aspects cannot exist for a long time. If we persist

3 Hunyuan Xingyi Taiji is the name of a martial arts style, which was fabricated by Ma Bao Guo.

4 This has been a social phenomenon in Chinese martial arts circles in recent years. It refers to a way for two people to compare their martial arts skills by dueling at an agreed time. This kind of appointment is often spread through the media, and even sponsored by commercial brands, so it is the subject of much public attention.

5 In 2017, Xu, a mixed martial arts practitioner, took part in a highly publicized fight against Lei Lei, a traditional martial arts practitioner who claimed to be the head of Lei Gong Tai Chi. Xu defeated Lei Lei in less than 20 seconds. After the event attracted widespread attention, the public became immensely sceptical about the authenticity of traditional martial arts.

in returning to the past, the result of this persistence is often the loss of cultural vitality, which can easily lead to the phenomenon of 'dead art' (人亡艺绝) or else the loss of the culture as the heirs of the martial arts die off, taking their traditional skills with them. This reflects the contemporary problem of a lack of heirs of ICH, a difficulty in acquiring apprentices, and a difficulty in passing on skills. This is in part because martial arts practitioners have a low social status. Since the Song Dynasty, China has had a tradition of 'supporting literature and downplaying the martial' (重文抑武). In modern society, relying on martial arts skills to make a living is still a relatively difficult task. On the contrary, practicing a martial art is very difficult, leading many young people to reject it as a career, meaning that most martial arts practitioners are amateurs. In addition, martial arts are difficult to integrate into people's lives. Traditional lifestyles have disappeared, especially in civilised societies where violence is discouraged or disapproved of. Moreover, the inheritors of martial arts are lacking in innovative spirit. Many inheritors of ICH projects are limited by their own knowledge and skills, and their thinking is conservative. According to Porchet's ethnography, one of the national inheritors of Taijiquan was only interested as an expert in inheriting 'things from the old masters of the past' (传承老前辈的东西). Here, authenticity is properly understood as something from the past, and this individual has hundreds of disciples seeking this connection to the past, to tradition and authenticity. However, with regard to maintaining the vitality of the culture, only a few people are interested in copying the techniques of the old artists, meaning that these hundreds of disciples are unlikely to become the driving force for continuing cultural vitality. Due to the decrease in the attractiveness of traditional martial arts to young people, the phenomenon of cultural disappearance caused by 'dead art' is more easily understood, and this phenomenon occurs every day in many boxing styles in China, such as *bamenquan* (八门拳), a local boxing style in Gansu of China, which is becoming increasingly rare.

The inheritance of ICH does not mean a return of the origins (原真; combat); rather, it emphasises the authenticity (真实) of skills, and the criterion for judging this kind of authenticity is the natural geography and social and cultural background on which the formation of the traditional martial arts was based, as well as the corresponding social and historical functions, the resulting spiritual and cultural characteristics, and adherence to traditional principles and laws (*lifa*; 理法) (Ruan 2015). This is the cultural essence of Chinese traditional martial arts and the core content of cultural protection.

INNOVATION AND DEVELOPMENT OF MARTIAL ARTS CULTURE

The UNESCO initiatives for the protection of ICH insist on a wide range of practices and living traditions. This insistence indicates a departure from previous initiatives of this type, including folklore festivals, often aimed at building national culture via performance on stage or some other form of revivalist elements that have been recognised as representative of an earlier, traditional culture [Hameršak & Pleše 2018]. In a sense, this culture is constructed in a new social environment. It is not traditional but it is closely related to the tradition. In the field of Folklore Studies, the key information that connects with the tradition are called 'core symbols'. Other symbols that maintain a

temporary identity and whose validity comes from changes in social conditions are regarded as 'random symbols' [Zhang 2018]. The core symbols and random symbols are not fixed and static but dynamic. The same applies to the diverse value functions of the martial arts as they are used in different fields. These functions may transform into each other and develop new cultural traditions in the process of transformation. For example, the competitive sporting event of *taolu* (套路) focuses on difficulty and beauty, while *sanda* (散打) focuses on combat, martial arts fitness focuses on health, and martial arts education focuses on physical education. Thus, the core values of martial arts in different fields are different, even though we could argue that regardless of the field, the practice of a martial art always takes place in the pursuit of 'self-improvement', 'self-transcendence', or a better way of life. This can also be understood as an expression of the traditional Chinese concept of 'self-cultivation' (修身), which includes the nurturing of both body and spirit (Chen 2019). Adherence to this core concept can also be clearly seen in Bruce Lee's creation of Jeet Kune Do. Lee took the essence of the traditional Chinese martial arts, focused on actual combat, learned from others' strengths, and then innovated techniques. The words on Bruce Lee's tombstone, 'Your inspiration continues to guide us toward our personal liberation' (以无法为有法,以无限为有限), have a strong Chinese philosophical strain, as well as being a true portrayal of his continuous pursuit of 'self-transcendence'. The innovative development mentioned in this article is not about the creation of new things but a method of development based on the core of martial arts culture from the perspective of ICH protection. The concept of protection actually includes the idea of innovation. The Convention for the Safeguarding of the Intangible Cultural Heritage has a clear definition of the protection of ICH: 'Safeguarding' refers to measures aimed at ensuring the viability of the ICH, including the identification, documentation, research, preservation, protection, promotion, enhancement, transmission (particularly through formal and non-formal education), and revitalisation of the various aspects of such heritage [UNESCO 2003]. Safeguarding within this context is thus a polysemic concept that includes not only the meanings of preservation and protection in a classical sense but also the ideas of enhancement, transmission, and revitalisation. It is often said that innovation in the traditional martial arts means 'innovating the old and bringing forth the new', but such a revolution is not a complete denial of the old materials. Rather, it is based on traditional practice; with the changes in the material and cultural environment, it is a kind of inheritance innovation, and this innovation contains the meaning of inheritance, promotion, and revitalisation.

The fundamental purpose of ICH protection is to continue and strengthen the inner life of the culture, enhance its own capacity for sustainable development, and guarantee a 'living inheritance' [Qi 2009]. Since the 1980s, China has spent considerable financial and labour resources on the martial arts for this purpose. A thorough process of investigation, collection, sorting, and filing took three years to produce a census of martial arts cultural heritage and for the rescue and protection of many endangered or lost boxing styles. Traditional martial arts cannot simply be left to die, lie dormant in archives, or sit in museums and showrooms for everyone to look at. Whether traditional martial arts want to play a social function or a cultural function, the first premise is that they must live. To survive in modern society, however, they must

adapt to the needs of modern society. As it happens, innovation for survival is not uncommon in the development history of the traditional Chinese martial arts, especially in the modern period. The Chinese martial arts have achieved a transformation from traditional to modern, and martial arts education, competition, and other aspects resemble those of Western sports [Morris 2004]. This change is exactly the dynamic change characteristic of the core symbols mentioned earlier. The expert-apprentice (师徒) relationship has become a teacher-student (师生), and the family-style teaching of *rumen* (入门) has become organised teaching. These changes do not mean the demise of traditional martial arts, only that as Chinese history and culture have changed, the 'most important' meaning of the martial arts has changed accordingly [Chen & Lyu 2022]. Strictly speaking, the traditional martial arts are regarded as traditional because they contrast with the modern martial arts, such as those seen in competitive events, schools, keep-fit classes, etc. For example, the thinking, system, and operational mode of competitive martial arts have been gradually integrated into the Western sports model, meaning that traditional and competitive martial arts have different value orientations, leading to their differentiation. Of course, not all traditions are able to stay unchanged over the centuries. The protection of the traditional Chinese martial arts cannot be like the protection of historical cultural relics, which will never change. Doing so would inevitably lead to a disconnection from social development, a gradual departure from people's lives, and a gradual disappearance, contrary to the original intention of protection. Effective inheritance (innovative development) on the basis of respecting traditions (real skills) is worthy of affirmation and recognition, whether it is for the needs of the times, adapting measures to local conditions, or for the purpose of sustainable development.

CHOICE OF METHOD FOR PROTECTING TRADITIONAL MARTIAL ARTS CULTURE

The traditional Chinese martial arts constitute a traditional skill, and thus skill is the core carrier of its ICH inheritance and the core of martial arts culture protection. The core skills and values represent their authenticity (真实) and thus their culture, which is the foundation of the protection and development of the traditional martial arts. The authenticity (真实) mentioned here is also referred to as *shouzheng* (守正), emphasised by the Chinese government, based on innovative development (*shouzhengchuagxin* 守正创新) while drawing on the core true culture of tradition, respecting the basic connotations of ICH, and promoting the contemporary value of the ICH [General Office of the CPC Central Committee 2021].

With regard to protecting traditional martial arts culture, we must first acknowledge that the ecological environment of traditional Chinese culture has undergone tremendous changes against the background of globalisation. The rapid development of modernisation, the dissolution of urban and regional boundaries, and the coordinated development of the regions have brought economic prosperity but have also catalysed 'cultural convergence', manifested in the simplification of culture and the gradual decline of local cultural characteristics. Due to the convenience of the advanced means of transportation, the mobility of human

beings has increased. At the same time, as people are the carriers of traditional martial arts skills, their movement has meant that they have taken their culture with them, resulting in the fusion of regional cultures. As a result, traditional martial arts relying on regional customs and local culture have gradually become consistent (南拳北腿; *nanquan beitu* are the simplest example of the regional characteristics of martial arts). The place where today's martial arts master is located will form the corresponding traditional martial arts framework. To survive in the new geographical environment, this new framework must adapt to the culture of its location. Newcomers adapt to the existing residents and vice-versa. This kind of 'cultural convergence' has been staged repeatedly, as manifested in the simplification of culture and the gradual decline of local cultural characteristics and gradual disappearance of distinctive regional martial arts categories. From the perspective of modern sports competition, this kind of simplification and standardisation is more conducive to fair competition and judgement. From the perspective of cultural protection, it is obviously not worth advocating. As a source of exchange, innovation, and creativity, cultural diversity is vital to humanity and is inextricably linked to the safeguarding of ICH [Federico 2011]. In this situation, the protection of the diverse characteristics of traditional martial arts must adhere to the core symbols of the regional culture and, under government institutional incentives, strive to protect the diversity of traditional martial arts culture as much as possible.

Second, it has become increasingly difficult to attract modern young people to participate in martial arts or sports, and innovations must be made to maintain the traditional culture. The German sports sociologist Helmut Digel has noted that the influence of the Olympic Games is not as strong as it once was. Some developed countries in Europe downplay them. The younger generation likes sports but not necessarily competitive sports [Miao 2018]. Consequently, many international sports organisations regard the need to increase sports interest and participation, especially among the young, as an important factor in future development. The creation of the Youth Olympic Games is an example of one innovation made by the International Olympic Committee to attract younger generations. There is no doubt that young people are the key to sustaining the vitality of culture. However, it is difficult for traditional martial arts with a strong traditional rural life and a strict system of accepting apprentices to attract the young. Like the Olympic Games, the traditional martial arts must also move with the times to attract more young people. At present, the Chinese government regards the 'inheritance protection system' as an important means of ICH protection, especially encouraging young inheritors to continue their skills. The government gives policy and funding guarantees so that they can have a better environment and conditions to spread their skills. The universities (sports colleges) encourage traditional martial arts inheritors to study and develop, and some colleges offer exams for practitioners of traditional martial arts.

The changes in the traditional cultural living environment pose a huge challenge to adherence to the principles and rules (*lifa*; 理法) of the traditional martial arts. The Chinese government promotes and safeguards outstanding traditional Chinese culture (*tuiguang yu baohu zhonghua youxiu chuantong wenhua*; 推广与保护中华优秀传统文化) and empha-

sises that the use of traditional wisdom to solve problems in the development of the new era is an important way for the innovative development of traditional culture. This is the 'creative transformation and innovative development of Chinese traditional culture' emphasised by President Xi Jinping. Traditional Chinese culture is spiritually symbolic of the Chinese nation and the basic and lasting force in the development of the country [General Office of the CPC Central Committee 2017]. The Chinese government has elevated the inheritance and protection of outstanding Chinese traditional culture to a major national development strategy, which has created a favourable policy environment for the protection of ICH and fundamentally improved the social living environment and professional status of ICH practitioners. Of course, as noted earlier, with the development of the times, great changes have taken place in politics, the economy, and culture, and traditional culture can only continue to develop if it keeps pace with the times. However, innovation of traditional Chinese martial arts must nonetheless adhere to the *lifa* of the traditional martial arts. Jizheng Ruan believes that modern martial arts represent a change in cultural heritage; thus the traditional routines (传统套路) are not the same thing as the traditional martial arts whereas new routines (新编套路) that adhere to traditional principles and methods can still be regarded as traditional martial arts [Ruan 2015]. Many inheritors have begun to publicly display martial arts skills that were previously kept secret within the master–disciple relationship, and there are some well-known martial arts masters who now are successfully sharing the secrets of boxing power and exercises through TikTok. These cases are indicative of the new ways of spreading real martial arts skills and constitute a new form of cultural transmission and development model integrated with the modern social and cultural environment [Chen 2021].

CONCLUSION

In 2020, Taijiquan, as a representative of the Chinese martial arts, was included in the UNESCO Representative List of Intangible Cultural Heritage of Humanity, which demonstrated the significance of Chinese martial arts culture to the world and brought opportunities for the global spread of Chinese martial arts. In the context of international martial arts research, the existence of ideological contradictions between Western and Chinese martial arts research is obvious in relation to the core issue – authenticity (正宗性) – of martial arts culture protection. In the current Chinese context, in which the martial arts are covered by the ICH protection state policy, the tension between the

two conflicting ideas of 'guarding authenticity' and 'innovating' is an important issue in the implementation of this policy. This article aims to understand how this dichotomy plays out in academic discourses in Chinese academic literature. It is clear that there are still debates on this issue in Chinese academic circles; in particular, it has always been difficult to form a consensus on whether to 'return to combat'. Chinese scholars have noted the changes in the natural and social environment in which traditional martial arts exist and believe that it is impossible to return Chinese martial arts to the genuinely 'traditional' (the past). The result of adhering to the 'past' of martial arts can only be the gradual disappearance of the culture. Many of the scholars who participated in the 7th International Martial Arts Studies Conference in July 2022 were very interested in the methods of protecting the traditional Chinese martial arts. All of them wanted to see some concrete and effective policies or successful cases so that people could see the work done to protect ICH. At present, the protection methods most recognised by Chinese scholars focus on the 'core skills' (核心技艺) and keeping pace with the times. This is the *shouzhengchuangxin* (守正创新) advocated by the Chinese government. Although most of the current academic research discusses how *shouzheng* should be implemented and focuses less on ways to innovate, there are many vivid cases exploring innovation and development, such as the government's support for the protection of inheritors, the encouragement of colleges and universities to recruit traditional martial arts practitioners, and traditional martial arts practitioners undertaking an obligation to pass on the traditional martial arts culture related to their own style through various channels. These are all examples of new development models responding to the characteristics of particular martial arts.

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ROLE DEMANDS AND PSYCHOLOGICAL FACTORS UNDERPINNING PERFORMANCE IN MIXED MARTIAL ARTS REFEREEING

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ABSTRACT

This paper offers a discussion of the role demands facing referees working in mixed martial arts (MMA), as well as the factors that determine their performance in managing them. To do so, it uses data derived from a qualitative, ethnographic investigation based on field observations carried out at 16 competitive MMA events, plus interviews with seven referees, six of whom had extensive experience of working at the highest international levels of the sport. This data reveals several specific problems that these professionals must navigate, along with the attributes, skills and resources they identify as necessary for doing so. The paper then discusses ways in which applied sport psychology interventions can contribute towards the work of referees, particularly with respect to handling the mental demands of working in this uniquely challenging sport.

The full-contact combat sport of mixed martial arts (MMA) has seen significant development in recent years. Now an internationally popular commercial sporting spectacle, it has numerous highly profitable promotional companies running competitive events around the world. In addition to its professional leagues, MMA also boasts a flourishing amateur scene, partly overseen by the International Mixed Martial Arts Federation (IMMAF) and its numerous national affiliates. Clubs and minor regional-level competitive events abound in many countries, creating opportunities for broad participation in MMA and providing a base for amateur and professional talent development. In the UK alone, for instance, at the time of writing, there are estimated to be over 480 martial arts gyms and clubs offering regular MMA training to their members [see Tapology n.d.], while competitive events in the sport take place across the country on most weekends of the year. However, despite its evident popularity, MMA remains poorly regulated in the UK with a lack of clear governance, and leadership structures largely built around voluntary cooperation with quasi-official bodies [see Channon, Matthews & Hillier 2020; Sigler 2013].

Alongside the sport's growth, academic studies of MMA have proliferated over the past two decades. Topics of interest have included the physical demands of the sport [Kirk et al. 2020]; its coaching methods [Vaaitinen 2017]; specific injury risks [Ross et al. 2021]; psychological demands of competition [Jensen et al. 2013; Vaccaro et al. 2011] and applied sport psychology concerns [Andrade, Silva & Dominski 2020]; fan and spectator motivations [Zembura & Zysko 2015]; athletes' attitudes towards risk-taking [Channon 2020]; their experience of pain and injury [Lenartowicz, Dobrzycki & Jasny 2022; Spencer 2012]; the sport's relationship with gender [Green 2015; Hamilton 2022]; the sense of community within gyms [Sugden 2022]; MMA media coverage and framing [Brett 2017; Naraine & Dixon 2014]; governance and legalisation [Ramirez 2023; Vertonghen et al. 2014]; and many more besides. However, to date there has only been one published paper that has explored the role played by referees within competitive MMA [Channon 2022].¹

This is surprising given the centrality – both literally and figuratively – of referees to the sport's action. Considering that MMA leadership and governance are often fragmented, officiating might reasonably be assumed to be a more onerous responsibility than in more formalised sports, and perhaps therefore a more important task to understand in this context than others. Indeed, as we will show in this paper, the proverbial 'men in the middle' occupy a crucially important place in facilitating fair and safe competition, and without skilled, well-prepared, competent officiating, the fortunes of the sport – as well as the wellbeing of its athletes – would be placed at significant risk. As such, scholars of combat sports in general, and MMA in particular, are advised to consider these officials in their efforts to understand this discipline, and

also see them as beneficiaries of academic knowledge and service in efforts to positively influence the development of this sport.

To address this gap in the literature, the present paper offers an overview of the key demands and challenges facing MMA referees, building towards a tentative set of recommendations for using applied sport psychology to help with their work. In line with previous research on the psychology of refereeing more broadly, we argue that sport psychologists can offer meaningful support to MMA referees in several core domains, and thus benefit the sport by supporting these vital players in its operational structure. To begin with, we offer a brief outline of existing sport psychology and sociology research on sports officiating, as pertinent to the present work.

THE PSYCHOLOGY OF SPORTS OFFICIALS: SELECTED THEMES AND ISSUES

As Hancock et al. note in their review of research on sports officiating, 'competitive sport would not exist' [2021: 607] without the involvement of its officials – umpires, judges, referees, and their assistants. Thus, over the past few decades, sport scientists from various disciplines have explicitly recognised that, given their importance to the institutional functioning of sport, such professionals ought to be seen as 'performers in their own right' [Slack et al. 2013: 298], with the demands of their roles, as well as their experiences and performances within them, studied accordingly. Such a recognition has led to a proliferation of empirical studies of officials, covering a wide range of topics including factors underpinning performance [e.g., Mascarenhas, O'Hare & Plessner 2006; Slack et al. 2013], training and development needs [e.g., Mack et al. 2018], career trajectories and motivations [e.g., Parsons & Bairner 2015], and the experience of, and institutional response to, abuse of officials [e.g., Mojtahedi et al. 2022; Webb 2022].

While lack of space precludes a thorough examination of this field of research, several topics that appear consistently throughout the literature warrant discussion here to contextualise the present study's findings. Firstly, the role of the official as holding significant responsibility to *maintain orderly gameplay* is often centralised in the literature. Here, officials are charged with enforcing the rules of play and punishing violators of those rules [Snyder & Purdy 1987], thus ensuring that matches proceed according to established conventions and in the spirit of fair competition. At the same time though, a careful balance must be struck between interfering in the interests of fairness, match integrity, or safety [Channon 2022], whilst not becoming an overbearing force that spoils or ruins the sport [Plessner & MacMahon 2013]. As such, officials must use their best judgement over when, and how far, to enforce the

¹ In this previous study [Channon 2022], the discussion centres on the role of referees in producing and maintaining socially desirable risk, principally aimed at constructing a theoretical discussion on the nature of risk, risk taking, and risk management in combat sports. While the current paper does discuss risk in some sections, its aim is broader, centring on the effort of outlining the role demands of MMA refereeing, vis-à-vis their implications for providing psychological support to these referees' work.

rules of the game, and when to allow infractions to pass by [Slack et al. 2013; Rains 1984].

This balancing of priorities calls for *complex decision making* that highlights the subjective nature of the work of officials, despite popular assumptions about such roles' need for objectivity [Mascarenhas, O'Hare & Plessner 2006; Rains 1984]. Referees, for instance, must often make nuanced and highly contextual judgements when discharging their duties [Hancock et al. 2021; Plessner and MacMahon 2013]. These may involve such factors as the degree or intensity of a potential foul, the likely intentionality behind it, its impact on gameplay and thus importance, its place within any patterns of prior actions, and the likely impact of taking one or another form of remedial or punitive action over it. That such decisions need to be made very quickly, in social contexts where emotions are running high and judgement of one's performance is always an immanent consideration [Slack et al. 2013; Smith 1982], highlights the *significant pressure* that many sports officials work under, and helps contextualise the *abuse* that many subsequently endure [Mojtahedi et al. 2022].

One way of helping manage these pressures and ensuring that their decisions are respected is to adopt an appropriate *style of communication* with others, such as athletes and their coaches. Although specific communication strategies may vary between officials and be best suited to different situations [Cunningham et al. 2014], characteristics such as clarity, assertiveness, confidence, coolness and empathy are often highlighted as important for effective communication, helping to ensure that officials' decisions are both understood and respected by others [Mascarenhas, O'Hare & Plessner 2006]. Impression management and presentations of self that emphasise similar characteristics also assist here by imparting a sense of the official as a trustworthy arbiter of sound judgement [Cunningham, Simmons & Mascarenhas 2018; Mellick et al. 2005]. Unsurprisingly, the literature points to a far wider body of *skills and attributes* that might benefit sports officials' performance beyond decision making or communication and impression management. Throughout the studies so far cited, these include (but are not limited to) emotional intelligence/competence, knowledge of their sport, mental toughness, physical fitness, positioning and movement, preparation before games, reflexive self-awareness, resilience and coping ability, and an intangible 'feel for the game' [Mascarenhas, Collins & Mortimer 2005; Pina et al. 2018; Plessner & MacMahon 2013].

To help build these various qualities, formalised structures for *training and career development* exist across sporting contexts. However, these may be more or less effective at imparting the required skills noted of the officials they serve and vary in content and quality between contexts [Cunningham et al. 2014]. Meanwhile, the importance of *teamwork and social support* for facilitating effective officiating emerges across numerous studies. Referees, assistant referees, judges, umpires and others will often work in teams during matches [Neville, Salmon & Read 2018], with such arrangements serving multiple purposes, from helping to ensure accuracy in decision-making through to strengthen-

ing the appearance of authority and so helping to stay in control [Boyer, Rix-Lièvre & Récopé 2015; Smith, 1982]. Beyond matches themselves, networks of support from other officials help to manage the emotional demands of the work [Slack et al. 2013], and can also afford opportunities for mentoring and career development [Parsons & Bairner 2015].

While this short and selective discussion of prior literature draws largely on the findings of a sample of qualitative studies, as Hancock et al. [2021] identify in their review article, the vast majority of research in this field remains quantitative, and is focused on testing the impact of specific, isolated variables on officials' performance. As such, there is comparatively little qualitative work on sports officiating, with social psychological and sociological studies in particular remaining relatively few and far between. Research on topics well suited to this paradigm, including officials' development, communication, and group dynamics, collectively accounted for only 15 of Hancock et al.'s review sample of 386 papers; less than 4% of the entire body of work on sports officiating that was thereby reviewed.

Moreover, while referees working in team sports (such as association football) have received much interest from scholars [see Webb 2022], other sporting disciplines are underrepresented in the field. In particular, very little research has directly explored the work of combat sports officials, with only 9 published studies dealing with a small range of martial arts; only 2 of these explore social psychological or sociological factors [Channon 2022; Smith 1982]. This lack of interest from scholars of sports officials is surprising given the unique challenges facing referees working in combat sports [see Bernick et al. 2021; Sethi 2016], most notably with respect to their clear and ever-present potential for injury [Ross et al. 2021], symbolic association with morally problematic 'violence' [Brett 2017], and the role of the referee as a direct mediator of such phenomena [Channon 2022; Channon and Matthews 2022].

Following Hancock et al.'s [2021] call to adopt more 'in-situ' methodologies, drawing on qualitative data with sports officials to develop knowledge in under-researched contexts, this present paper makes an original contribution to the field of officiating research by offering an overview of the role demands of MMA refereeing grounded in qualitative social science research. Here, we seek to explain in detail the core responsibilities that referees have in this sport, outlining various challenges they face and the skills they require to manage them, with a view to building a series of recommendations for how applied sport psychology can be used to support them in their work. Our intention for doing so is to ensure that combat sports referees are better represented in the academic literature, whilst also highlighting the potential for academic work to be mobilised towards positive interventions in a complex and highly demanding field of practice. Ultimately, we hope that this form of scholarship can be influential in improving professional standards within MMA, given the centrality of referees to its effective functioning. In the following section, we outline the steps undertaken to these ends.

METHODS

Adopting an ethnographic methodological stance, this study involved a period of immersion within the social field of competitive MMA in the UK. We assumed an interpretivist, qualitative epistemological position to understand the experiences and realities of MMA officials by means of close proximity to the action comprising their day-to-day work, along with detailed conversations with them to help make sense of it [see Smith & Sparkes 2016; Thorpe & Olive 2016]. We argue that this approach was the most fruitful to take given the paucity of research on combat sports referees to date, as well as the need for a robust, descriptive account of referees' work that is required to meet the aims of the study. In particular, the combination of observations with interviews meant that we were able to see first-hand how various role demands played out in real-time, while being able to discuss these with the characters who understood them best. The complementarity of these methods is well-understood by ethnographers [Atkinson 2016], and certainly benefited the data gathering in the present study.

Researcher positionality

As a practitioner of martial arts and follower of competitive MMA, the first author was able to integrate himself into this field via his contacts at local training centres, and thereby go on to establish rapport with respondents and gatekeepers around shared interests and understanding of the combat sports milieu. This positionality likely supported easier access to the field and helped ensure that its most prescient concerns were addressed in the study, although it also necessitated reflexive care over the analysis of data to avoid biases or taken-for-granted assumptions. In this respect, the second author – herself not an 'insider' in the sport – helped challenge and critique the first authors' interpretations during the analytical process, returned to below.

Procedures and sample

Observational data were collected by watching referees work at 16 competitive MMA events held across England between early 2018 and mid-2019. Observation periods at these events lasted 4–12 hours (avg. 7.3 hours), and in total 17 different referees, all of them men, were observed during the study. Most of these were observed more than once, since referees often worked in pairs or small teams at most of the events visited. Observations were recorded using hand-written field notes, which were transcribed within two days of the events. Meanwhile, the interview arm of the study utilised semi-structured interviewing with seven MMA referees, all of whom were men, aged 31–54 (avg. 42) at the time of interview. Six of these had extensive international experience, working for many if not most of the sport's major promotions, as well as at lower-level, regional events. Five of the referees were based in the UK, with one based in the USA and one in Australia, although all were working in the UK at the time of the study. Their levels of experience ranged between 6–15 years at the time of interview, with an average of 10.2 years. All of them had previously competed as MMA fighters, and had also performed other roles in the sport, such as coach-

ing or judging. Thus, while the sample size is small, these participants held a wealth of knowledge about MMA, each having officiated thousands of rounds over the course of their careers. The interviews lasted 34–74 minutes (avg. 50 minutes) and were conducted either on-site before the start of competitive events, or online using video calls. These were digitally recorded before being transcribed verbatim. All interviewees were included in the observation sample, and interviews took place contemporaneously with observations.

Ethics

Ethical approval for the study was granted by the authors' institutional review board. All participants provided written consent to take part in the study, after being informed of its voluntary nature and their right to withdraw at any time. As far as is feasible, identifying information has been removed from this manuscript; notably, this includes participants' ages, ethnicities, and nationalities. Despite calls for greater transparency in reporting demographic information in research on officials [e.g., Hancock et al. 2021], given the very small community of MMA referees working in the UK and the public profile of most of the sample, disclosing this information would likely compromise anonymity. All participants are referred to via pseudonyms, while the approximate length of time each participant had worked as an MMA referee at the time of interview is also noted at first mention.

Analysis

Data analysis for this paper was shared by both authors and involved the use of thematic analysis. With her training and experience in applied sport psychology, the second author's perspective was invaluable in refining an interpretive framework pertinent to the practical application of academic knowledge. This complemented and extended the insights developed through the first author's ethnographic research and MMA 'insider' perspective, ensuring that empirical findings and context-sensitive conceptual analyses could be reconciled with applied practice considerations. The exact procedure used to analyse the data involved our own interpretation of the steps outlined by Braun, Clarke and Weate [2016]. Specifically, we began by coding the raw data transcripts, guided by our reading of the literature noted above. We then clustered these codes together into a broad set of first order themes, which were then reduced into coherent thematic categories. We then re-presented these through writing out short, descriptive summaries of what the themes showed about the data. These summaries were then themselves re-coded to generate a set of second order themes, this time adopting a more conceptual, analytical perspective that cut across the data set, revealing patterns throughout the accounts. Finally, these were also written up into short 'analytical narratives' [Braun, Clarke and Weate 2016], which could be compared back to the raw data. As a form of member checking, one of the interviewees was contacted to review these summaries and supported them as accurate accounts of the work of MMA referees.

FINDINGS

The following sections outline the second-order themes noted above, organised around key challenges and core competencies referees highlighted to us through their interviews, and which were observed in their actions. Each section is illustrated with data excerpts most pertinent to the theme in question, collectively demonstrating the role demands of this work.

Decision making: Balancing risks, stopping fights, and facing consequences

Referees may hold many responsibilities while managing the action of MMA fights, but enacting stoppages when fights are deemed to be over is perhaps the most important of these. In MMA, stoppages are considered appropriate when 'a fighter is no longer actively, intelligently defending themselves' (Frank, 15 years); that is to say, when a fight is seen to have reached its own conclusion, with one opponent unable or unwilling to resist the other, and thereby no longer a legitimate target for attack according to the sport's moral logic [Brett 2017; Channon 2020].

This determination of a suitable stoppage effectively requires assessing and balancing two different types of risk: risk to the athlete's health arising from continued physical punishment, versus risk to the competitive integrity of the bout arising from a referee's undue interference. As discussed above, referees are cognisant of the need to move carefully between these two poles:

I'm trying not to intervene too much unless necessary. I'm not trying to spoil the fight but at the same time I don't wanna jeopardise fighters' safety. (Baz, 6 years)

As a referee you want to be invisible if you can. If you can get through a big fight, and nobody can remember who was the referee, then that's ideal. It's a compliment to the fighters that they fought clean and steady, didn't need interruptions and didn't foul, and it's also a good reflection on you that you let them fight. (Hugh, 15 years)

These two overarching risks – threats to health and fight integrity – overlap with several others. An 'early stoppage' risks the athlete's (and their coaches') career record and thus potentially the much-needed financial rewards from participating (particularly so at the professional level [see Bernick et al. 2021]). It also risks undermining the enjoyment of spectators and thus the commercial success of the event and fortunes of the wider sport – not to mention earning the referee an undesirable reputation for being 'too safe'. Meanwhile, a late stoppage threatens not only the health of the athlete as they absorb additional, 'unnecessary damage' (Kevin, 8 years), but also similarly earning a reputation for the referee as being 'dangerous'. Moreover, there may also be legal and/or financial implications for the referee, the organisers of the event they

are working at, and the public reputation of the sport at large, should catastrophic, preventable injuries or deaths occur:

From a selfish point of view ... I've been to coroner's court before [in the context of my day job] and it ain't much fun. And there will be an enquiry, and if you haven't done *everything* that you thought you could do, that's it. That's it for you, maybe for the promoter. And that'll ruin the whole sport for everybody, too. (Jon, 7 years)

These overlapping and at times conflicting risks were not lost on the referees, yet they unanimously affirmed an overriding concern with athlete safety whenever there was any doubt over what action to take, such that 'decisions are always based on the fighters' safety, first and foremost' (Ali, 10 years). Tellingly, referees often noted this priority was not always shared by fighters themselves:

That's what I'm there for, to save you from yourself. You may not realise it but that's what we're here to do. Your adrenaline's kicking in, your mindset is to fight ... fight to the death! But like I said I'm saving you from yourself, saving you to allow you to fight another day, to go home to your family in one piece. (Baz)

Herein, the referee assumes the right to 'make that wise decision on [a fighter's] behalf' (Hugh), preserving their health and wellbeing by ending a fight when they refuse to quit. While other sports officials navigate various tensions in their decision-making processes [Plessner & MacMahon 2013], MMA referees here face a deeper ethical dilemma than most, given their primary responsibility for athletes' safety in a sport replete with immanent physical danger. This tension becomes particularly acute in moments where stoppages are not yet justified within the sport's norms, but an athlete's wellbeing may nevertheless be threatened as they continue fighting despite losing badly [Channon 2022].

Moreover, it was evident that MMA referees are likely to come in for significant abuse over unpopular decisions, regardless of whether they felt morally justified in their own calls. While largely centring on enduring crowd taunting or social media abuse, this could also involve violent retribution from fighters, their entourage, or their fans. Although apparently very rare, two participants in our sample recalled such incidents; one who was physically attacked in the cage by a losing fighter, and another whose car was vandalised by fans outside the arena. Otherwise, as one highly experienced referee put it:

If someone asks me what I do for a living I tell them, 'I basically travel around the world to get shouted at'. All the time, people scream at me! (Hugh)

Communication: Maintaining control via strategic interaction

Although directly abusive treatment from fighters was a rarity, most interviewees reflected on moments where the emotionally fraught nature of MMA fights challenged what was otherwise a normalised cultural expectation to respect the referee. This had the potential to undermine their ability to control matches or events, or could otherwise make them targets of emotional outbursts:

You do get a lot of that response, hostile response [to stop-pages] ... Adrenaline is going through their body and their emotions are all over the shop for those first few seconds. They hate everyone, they just got busted up. (Noel, 10 years)

To that end, strategically adopting specific communication styles was discussed as a vital skill for effective refereeing, as it could allow them to stay one step ahead of the emotional tumult engendered by the sport. Typically, referees used interactions with fighters (and coaches) prior to the commencement of matches to establish a sense of authority, and/or a trusting rapport, before 'that red mist comes down' (Noel) in the cage. As in previous research [Cunningham et al. 2014], they employed different stances and styles of communication relative to the perceived needs of the moment. This could take the form of relaxed, rapport-building conversations with groups backstage; empathetic one-to-one discussions with nervous fighters; or assertive and confident delivery of a 'rules talk' with whole rosters of competitors and their entourages:

What I'll usually do is, depending on how much face-time we've had before the moment we're actually in the cage, I'll go over and give them a few words, like, 'you need to protect yourself at all times, keep fighting until I tell you to stop'. Just, a few little things like that. Then I'll just say, 'good luck', and again, it's just that politeness to go over and offer a hand or a fist-bump, just so that again, they know who they've got in there with them ... If I sort of convey that command from the get-go, then that can go a long way into getting them to do what I say. (Jon)

The fighters and their teams gather in rows facing the cage, where Baz stands alongside Ali to deliver the rules talk. I note Baz's well-practiced routine for establishing a sense of authority here. Normally soft-spoken, he now projects his voice, emphasising certain words for clarity. At several points, Ali is used as a partner to physically demonstrate legal and illegal techniques; Baz doesn't ask kindly for permission first, he just confidently and assertively grabs and moves Ali, a large and well-muscled man, into position. Occasionally Ali interjects to add detail to what he says, and at other times Baz invites him to cover anything he might've missed. The rules talk is clearly a mutual operation; their collaborative performance makes it clear they work together and share responsibility for officiating fights, covering each other's backs as a unit. Despite the seriousness of their general demeanour, both men inject humour to the process, and both casually swear, breaking formality enough to keep things relaxed. (Field notes, July 2018)

During matches themselves, all referees held a preference to say very little, and what they did say always centred on giving clear, unambiguous direction to fighters. During rounds they avoided long sentences or questions, while between rounds they offered only necessary input, such as to check their commands had been understood. Centrally important here was clarity and assertiveness, leaving athletes with no doubt as to either the referee's message or its importance:

When one fighter's fingers find purchase on the chain link in front of where I'm sat, Hugh calmly tells him, 'Let go of the fence'. He does, but seconds later he grabs it again. The command is repeated, with more emphasis; he lets go once more. As Hugh leans forward to get a better angle on strikes thrown in the clinch, the fighter once again slips his fingers into the fence, and the corner team sat directly under the action yell, 'Ref! Ref! He's holding!' To this, Hugh responds without breaking his gaze on the action: 'Be quiet! I can see him!', before shouting to the man, 'Let go!' and slapping the back of his hand. (Field notes, July 2018)

Perception: Building and employing 'intuition'

A referee's ability to adequately perceive and interpret information during the progression of bouts was considered essential by all interviewees and was discussed as being determined by a range of interrelated factors. Firstly, a need to stay exclusively focused on the fighters during each round of active competition was repeatedly emphasised:

You can't switch off at any point. You gotta be ready to, you know, get in on a split second's notice. So it's like, you're kinda constantly zoomed in, you know what I mean? It's hard to take in the periphery of what's going on anywhere else, you're kind of like really zoned-in on these two guys, where they are, what's their relative position, who's throwing what, is anybody in danger? It's like a weird sort of blinkers that you've got on. That's what it feels like to me anyway, when I'm doing it. (Kevin)

To help with this, referees also needed to constantly move into optimal positions to adequately see what was happening. Typically, this meant standing perpendicular to the space between fighters, out of striking range but close enough to intervene immediately if needed, while adjusting height depending on the phase of – for instance – a grappling exchange. Not only is this a physically demanding task, but it also requires sufficient knowledge of martial arts techniques used in MMA (of which there are a great many) to know where they ought to be standing and looking. Consequently, this led interviewees to place a high premium on knowledge of the techniques and tactics of their sport:

We want people who understand the techniques of the sport if they're refereeing. Some people have no interest or even no background in the sport, and they wanna officiate it, and that's not what we're looking for. The athletes don't deserve that! (Frank)

At events where referees are working in a small team and overseeing a long evening of matches, the physical demands of constantly moving into correct positions raises the prospect of fatigue impacting on their performance, as important information may thereby go unnoticed:

The hot summer evening has felt particularly long; Ali and Baz have worked a card of almost twenty fights between them, and were both dripping with sweat before the night was half done. I catch Baz's eye at cageside between rounds. 'Bloody hot,' he moans, showing me his damp towel. 'Gotta stay hydrated, mustn't lose concentration, miss anything'. I ask him if he's concerned about his performance; 'Oh, always,' he replies, 'but this is why we stay in shape. Easy to miss stuff, slip up if you're knackered'. (Field notes, July 2018)

Echoing the notion of having an intangible 'feel for the game' mentioned elsewhere [e.g., Slack et al. 2013], MMA referees also see their work as 'quite an intuitive thing' (Jon). In this sense, their ability to read the body language of fighters, anticipate their movements, interpret the condition of a losing opponent and correctly surmise their chances of success all in the split-seconds between strikes are key perceptual skills informing decisions on where to move next, what to look at, what to say (if anything), and whether or not to make a stoppage decision:

It comes down to reading a fight and not just watching it; what's the story that's unfolding here, what's the picture that's being painted in front of me? You need to trust yourself to build that sense of what's going on. (Hugh)

All referees affirmed that the ability to demonstrate such competence was essential for safe and effective work in the cage. This would largely centre on possessing sound technical knowledge of the sport, as well as the confidence to trust their own judgement, in order to accurately and consistently perceive and interpret relevant information. Thus, referees' apparently 'intuitive' perceptual abilities could be seen as an embodied expression of faith in their own accumulated knowledge and skill:

For me to be aware enough, to see enough, feel enough of the fight to make that decision and to be confident and stick by it, that's for me, competency ... In that moment in time, when I do make those stoppages, for me that's the right call and that's the end of the conversation. I'm confident in the call I made, that's what makes me competent [as a referee]. (Baz)

Soft skills: Emotion management, empathy, and reflection

As well as being confident decision-makers, effective communicators, and skilled perceivers and users of information, referees often highlighted the importance of managing their own emotions during fights. As noted earlier, the sport's intensity and high-stakes action can make this a difficult proposition, with referees generally expected to play the part of cool-headed arbitrator, facilitator, and even caregiver in a context where others are seen as highly liable to lose control:

It's the knockout ones, where they wake up and don't know where they are. Sometimes they're more confused than anything, and you can just see fear in some kids' eyes, they're just really fearful and you have to calm them. And if I'm freaking out too, I'm just gonna make the situation worse. I've gotta have a calming voice, I'll usually put a hand on their chest, and just let them know they've been caught, 'fight's over, you've got caught, it's over. The doctor's in now, it's over'. They're the things that we need to be prepared for. (Noel)

Given all the referees involved in this study had prior experience as competitive fighters, and most continued to train in martial arts, it is unsurprising that they would feel empathy with the men and women whose matches they oversee. While keeping one's emotions in check, and visibly sticking to the appearance of objective impartiality during a fight was important, overt displays of such empathy were often observed afterwards:

As a fighter drops against the cage wall, Ali waves off the match. The victorious fighter rushes off in celebration; Ali crouches next to the losing man and talks softly to him, patting him lightly on the cheek. The fighter hangs his head, arms folded around his knees, shoulders gently moving as he seems to sob. I later ask Ali what was said in the exchange. 'Well, it's partly to see if he's awake, but then also, we've done this, we know what it's like and we want them to know we understand, we care about them in those moments. It's not easy to lose'. (Field notes, July 2018)

With respect to the aforementioned need to make stoppage decisions, the institutionally formalised role of the referee as a mediator of fights is indicative of their assumption of the right to decide, on athletes' behalf, when to withdraw their consent for participation [Channon & Matthews 2022]. This act of 'saving them from themselves' was seen as no small moral responsibility, and as noted, has pressing consequences for referees' own emotional wellbeing if they were to make costly mistakes:

If you want the fucking raw, honest truth, ok, I would crumble, I would fucking crumble, and I don't know what I'd do if I walk in a cage, and somebody, three of us walk in, two of us walk back out. I don't know what I would do. (Hugh)

This fear over the 'nightmare scenario' (Frank) of a fighter suffering serious injury or dying on their watch was a powerful motivator for referees to pursue perfection in their work. In this sense, all of the sample stressed the primary need for critical introspection and reflexive self-evaluation as key to one's on-going development. This served to assure the quality of their work and went some way to mitigating the feelings of anxiety they felt over the possibility of failing to adequately protect athletes:

Being honest, being self-critical, that's the way I am ... nobody's a bigger critic of me than I am of myself, and nobody's perfect, I'm always trying to be perfect, but I know I'll never get there. It's a journey, and when I think I've reached the end of that journey, I'll retire. (Hugh)

Teamwork: Professional networks, support, and solidarity

The last consistently cited factor underpinning referees' performance was their ability to work in teams and rely on each other's support. With respect to learning and reflection, their colleagues' critiques were often seen as vital in assisting their own developing understanding of the sport, as was the opportunity to critically evaluate others' work. For the less experienced interviewees, the chance to work alongside a more senior colleague became something of an informal apprenticeship that complimented any unofficial training courses available to them:

I think that by and large, the best training that you get is being critical of your own performances. And having peers that are constructive, but brutally honest. (Jon)

I did the [unofficial referee training] seminars [run by Hugh], but really Ali basically took me under his wing ... for me it was important that I learn what is going on and I felt the best way to do that was hang around, observe, learn from others like him. (Baz)

Indeed, recognising that the organisational infrastructure of MMA remains in its infancy and regulation in many countries is either fragmentary or non-existent [Vertonghen et al. 2014], establishing wider networks of peers was seen as essential not only for the development of individual referees [e.g., Parsons & Bairner 2015; Slack et al. 2013], but also as a means to help with the development of the sport more broadly. Collectively, referees could thereby uphold and promote good standards in lieu of formal governance structures:

[In the unregulated UK MMA environment], it's every man for himself. And I say that loosely, in a sense that, you know, the officials stick together so to speak, and there's a handful of officials that make sure all the shows abide by the rules. We do what we can to make sure there's some standards in place, raise the bar for everyone else, you know. (Ali)

In the more immediate context of individual MMA events, having colleagues on hand to help advise on procedural decisions, reflect on match outcomes, enforce cageside discipline, or otherwise carry out other supporting tasks was considered very useful:

You should never work an MMA show alone, it's far too demanding, too draining. (Hugh)

A lot of the shows you go to there's at least two or three other referees, so you've at least got someone to have a discussion with, say the cage padding looks a bit dodgy, you can bring someone in, have a look and talk about it, like 'what do you think? How can we fix it, is it fixable?' So, I think it's very rare

that I'd go on and be on my own as a referee and have to make all the decisions myself. You'd usually be in a group where you can at least run things over between you and kind of use the hive mind a little bit to try to come up with a solution. (Kevin)

Finally, as well as working with other officials, referees also understood the need to proactively connect with other staff, such as event medics, to facilitate their own and others' work. Such alliances allowed them to coordinate their efforts more effectively, and even push back against what they saw as dangerous or unethical decisions from others. Such teamwork was often considered mutually beneficial and sought out by these other staff as much as by the referees themselves:

Midway through the night, the medics are asked by the promoter to check and clear a fighter who'd already lost his match via TKO, who he wants to put out again to replace a late withdrawal. This would keep a fight on the card that would otherwise be cancelled, but it's clearly a risk to the man's health. The medics are agitated and uncomfortable with the prospect, but the promoter isn't hearing their complaints. A few minutes later, there is a buzz of activity among the medics and referees. I see Baz and Ali talking angrily with each other, then Baz walks past us swearing, 'I'm not doing it mate, I'm not ref-fing this shambles'. Ali finds, and yells at, the promoter's staff; I watch him from a distance as he gestures unambiguously with his arms – the fight is off, or else it won't have a referee. Rose, a paramedic, soon returns to her seat beside me. 'The refs sorted it,' she says with a grin; the fight is indeed off. 'Teamwork!' (Field notes, May 2018)

DISCUSSION: IMPLICATIONS FOR APPLIED SPORT PSYCHOLOGY

It is important to recognise the unique circumstances of any sporting context when advocating for psychological interventions to support its athletes, coaches, and indeed, officials. With respect to the context of MMA referees' work, principal among such concerns is the ever-present danger of catastrophic injury occurring during matches, coupled with the general tendency among fighters, their coaches, spectators, and other stakeholders to approach these risks in ways which potentially trivialise, and sometimes outright ignore, athletes' welfare or wellbeing [Channon 2020; Lenartowicz, Dobrzycki & Jasny 2022]. That referees are largely left shouldering the responsibility for protecting athletes in a social context that is highly conducive to causing them damage lends a sense of urgency to their work that they are well aware of, and which should be addressed by any form of professional support provided to them. Indeed, wrong decisions by referees can potentially lead to a fighter's injury or even death, which is unlikely to be as pressing or immanent a concern for referees working in other sports, or for the athletes and coaches that sport psychologists might otherwise have experience of working with.

Sport psychology practitioners might start their work exploring this sense of responsibility by foregrounding MMA referees' decision-making processes. Here, case studies can be used to discuss a variety of situations for referees, based around applying and evaluating the use of criteria for stoppages or other important scenarios in both real and hypothetical situations. Case studies might be presented in a written form,

or perhaps more usefully in video format. This could involve watching videos from their own earlier matches, or clips of others' (controversial) refereeing decisions. This may benefit both novice referees who still lack experience in the field, as well as more experienced referees who might want to engage in critical self-reflection. Ultimately, such work can also lend itself to developing the sense of confidence outlined above as a key component of competency, helping to build self-belief through repeated practice, imagery, observation, and refinement of this core sense of practical understanding [see Hall et al. 2009].

Developing communication skills, with a focus on how to communicate information to coaches and athletes before, during and after fights, is another potentially fruitful area that applied sport psychology practitioners can help referees with. One such strategy might take the form of exercises that focus on creating short and clear messages to the fighters, that they will be able to comprehend during or immediately before bouts in particular – these being periods where fighters are likely to be intensely focused on fighting, and/or dealing with particularly strong emotional activation [Vaccaro, Schrock & McCabe 2011]. As noted by Simmons [2006], effective communication strategies can also help with developing confidence in referees.

In this sense, MMA referees can work on creating a 'cage persona'. Identifying ideal attributes and qualities of such a persona can involve reflecting on questions such as 'how will this persona make sure that fighters and coaches listen to me before, during or after a fight?'; 'how will this persona show that I am confident and knowledgeable?'; 'what will this persona do if someone starts arguing with my decisions?'. This exercise can have two aims: working as a form of self-directed performance profile, to help identify necessary skills and qualities for a referee, while at the same time helping to develop impression management strategies [see Manley & Thelwell 2016]. This created persona might also work as a safety cushion for when in doubt; 'what would the persona do?' Hence, creating a cage persona might help with clarifying and developing a strong self-concept around unambiguous notions of what kind of a referee one aspires to be, and assist with reflecting this confident version of the self to others.

Communication outside of the context of competitive events might help to build rapport between referees and coaches/fighters, creating more respect and understanding between them [Slack et al. 2013]. Seminars on rules and officiating practices, given by referees at MMA gyms and clubs, might be one mechanism for achieving this. These could perhaps be facilitated by sport psychology practitioners working with referees, who might offer mental performance workshops to the athletes there as an additional incentive to take part. Alternatively, digital resources might be created such as video analysis of fights by groups of referees for dissemination among practitioners online, as some studies show that watching a video of their most recent matches, accompanied by explanation of the referees' point of view and accounts of their decision-making process, helps with communication and rapport building with athletes and coaches in other sports [e.g., Mascarenhas et al. 2005]. However, this might be difficult to apply in MMA, given the sport's tendency to lack central governance in many contexts, meaning a possible lack of the general organisational coherence that might facilitate this

out-of-competition communication. This would mean relying instead on referees' existing contacts, among whom such rapport building may not be quite as necessary.

In general, referees may benefit from learning about mental toughness attributes [Slack et al. 2013]. While there are numerous variables that might be seen as comprising mental toughness [Plessner & MacMahon 2013], exactly which to focus on depends on the individuals concerned. For MMA referees, working with an applied sport psychologist can help create personalised inventories of such attributes; these can then be used to develop coping strategies which could be useful for dealing with the sport's pressures that they feel most acutely, such as handling abuse from fans, or maintaining focus during bouts. Given the discussion outlined above, combat sports referees might benefit specifically from learning about different emotional coping strategies, such as practicing calm in the face of hostility, not taking things personally, and emotional distancing from public aggression [Devís-Devís, Serrano-Durá & Molina 2021]. In addition, referees can use self-talk techniques to regularly remind themselves of their own expertise, which is usually much greater than that of fans in the audience, to help diminish the impact of any abuse from the crowd [Simmons 2006]. This will be especially important for younger or novice referees, who may lack practical experience and might therefore be prone to doubting themselves more when confronted with social disapproval.

Following this, sport psychology practitioners can help referees to process their own emotions, especially if referees doubt their decisions or feel that they may have misjudged a situation in a fight. Analysing errors, accepting that one cannot be perfect all the time, perceiving errors as something temporal and something to learn from [Wolfson & Neave 2007] can all be very fruitful areas for such work. In this case the use of imagery might again be beneficial, either for retrospective replaying of a problematic situation and making a different decision for evaluation, or for helping to anticipate future similar situations. Developing critical self-reflection and clarifying one's own philosophy will yet again help contribute to the confidence that is so important in this job, whilst helping to understand, accept and manage the impact of the work's emotional strain.

Lastly, communicating openly with other referees (or indeed, a sport psychologist) about the aforementioned issues can simply create a safe space to vent frustrations or reflect on experiences [Simons 2010]. As noted throughout this paper, having social support is very important, particularly given the nature of officiating in a sport where one's core concern – athletes' safety – may be overlooked by many others, not to mention the other cognitive and emotional demands of the work; the abuse one might endure; and so on. However, referees should also remain cognisant of the limitations of both each other's and sport psychologists' professional remit, as such confidants often cannot provide counselling in the case of more complex emotional disturbances. Referral to clinical practitioners could be necessary to help cope with traumatic responses to fighters' serious injuries or similar situations [Van Raalte & Andersen 2014].

CONCLUSION: LIMITATIONS AND FURTHER RESEARCH

The qualitative, multi-method ethnographic research informing this paper has allowed us to offer a detailed discussion of the roles of MMA referees and draw attention to several opportunities for using sport psychology to positively impact their work. At the cost of lengthy and abstract conceptual discussion, we have focused instead on offering a detailed description of a range of empirically evidenced phenomena, with the intention of forming up recommendations for applied practice. To that end, we are confident that this article paints a vivid picture through which colleagues might better understand the nature of MMA refereeing, as well as feel better prepared to engage with practitioners in this field, and/or those in related sports.

However, as with similar qualitative investigations, our methodological approach suffers from a lack of breadth. With only a very small sample of participants, all of whom were male, the findings cannot be assumed to be generalisable to the entire population of MMA referees. It is highly likely, for instance, that female referees may experience the same types of issues noted here, but also face further unique challenges [Hancock et al. 2021; Webb 2022] in this numerically male-dominated and reputedly 'masculine' sport. Moreover, the location of all the observations in England limits the scope of the events witnessed, particularly owing to the unregulated nature of MMA in this country at the time of the study. In contexts where governance structures exist to regulate the sport and referees' roles within it, it is possible that different practices might exist and/or other problems or issues mark the experience of officials in the sport [e.g., Webb 2017].

Nevertheless, we remain confident in the value of this descriptive account of the work of MMA officials. If nothing else, we believe it goes a long way to revealing some of the core challenges and tensions involved in this work, which are both similar to, but also in some respects significantly different from, those evidenced by research on officials in other sports. We hope that colleagues involved in both research and practice find our efforts useful in shining light on this under-researched but fascinating group of sports officials.

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THE BIRTH OF BRITISH SELF-DEFENCE: 1604-1904

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ABSTRACT

This article examines the discourse of self-defence as it emerged and developed in the British context after the introduction of self-defence as a legal term in English common law in 1604. Twentieth century self-defence discourse is comparatively more well-researched than previous periods, but this study suggests that the concerns, contours and characteristics of current self-defence discourse were established much earlier, growing in the seventeenth, flowering in the eighteenth and maturing during the nineteenth centuries. The study traces this development by examining self-defence books published in Britain between the seventeenth and early twentieth centuries. This covers a 300-year period from 1604 (the year that the legal precedent for self-defence was set in England) to 1904 (the year in which publications on *jujutsu* mark an orientalist reconfiguration of a hitherto Eurocentric self-defence discourse). Key features of self-styled self-defence texts are discussed in order to clarify the concerns, approaches, and ideological investments of self-defence discourse through this period in this national context. This process reveals that self-defence discourse accrued a range of additional dimensions throughout this time period that remain common today. Self-defence began as a *right*, but soon began to be discussed as *something to be prepared for*. Such preparation implies *training*, and self-defence discourse soon morphs into a focus on training, and self-development, rather than an explicit focus on a potential future event. While discussing this, the article shows how and why 'self-defence' is an enduring discourse, with regularly reiterated patterns and features, one that can be picked up by multiple ideologies and for multiple purposes, because it is organised by the intimate melding of the enduring yet essentially variable and plastic notions of 'self', 'home', and 'threat'.

INTRODUCTION: SELF-DEFENCE AS DISCURSIVE ENTITY

The subject of self-defence is vast. It is a term used across multiple realms and registers, and equally appropriately applied in contexts as different as biology, economics, zoology, psychology, international relations, law, rhetoric, and more. In the world of human affairs, self-defence is evoked in contexts as diverse as justifying military strikes and declaring war, through to business or political strategies and decisions, across social situations, all the way through to its many potential literal and metaphorical uses in almost any context of everyday life. It is what can be termed a *discursive entity*: widely used, universally understood, and instantly intelligible [Foucault 1978; Laclau and Mouffe 1985; Bowman 2007; 2021].

In many national contexts, self-defence exists as a precise legal plea or verdict that can exonerate a defendant or mitigate an action that would otherwise have been considered illegal. But its definitions and thresholds vary from (national, legal) context to context, and it exists in diverse relations to diverse criteria and considerations. As such, there cannot be said to be one fixed referent or one universal and univocally agreed definition of self-defence. Nonetheless, what unites its heterogeneous uses across many different language games or discursive contexts – disciplinary, national, and cultural – is the reference it relies on to some sense of action against another in the name of sovereignty and/or survival: reactive, responsive, defence of the self (however ‘the self’ is defined). Self-defence, as conventionally used across most contexts, overwhelmingly evokes an otherwise illegal or unacceptable intervention into another(s) realm of sovereignty, activity or survival, in the name of preserving one’s own, but only because of the threat posed by the other to the self. No action is inherently or automatically self-defence. For anything to be regarded as such, it must rely on a *representation*, an argument and an interpretation. One must make the case that one’s own sovereignty-transgressing action was a justified response to another’s sovereignty-transgressing action. As such, although self-defence is an ‘immediately intelligible’ and widely used discursive entity, it is actually subtle, slippery, and irreducibly complex.

Given its massive range of meanings and contexts of deployment, any study or discussion of self-defence must necessarily limit its scope. In what follows, the scope of discussion is limited by focusing on self-defence books which take as their explicit focus the individual (rather than, say, the group, the community, or an institution – even if a collective such as the nation is also invoked). As such, the focus is on books

advocating the self-defence of the embodied individual – the living, singular human subject.

In the British – actually, the English – context, this genre of writing began to emerge and develop after 1604, following a court case (‘Semayne’s Case’) in which ‘self-defence’ was given as an exculpatory verdict in a legal case [Coke, 1600, p. n/p; see also: Online Library of Liberty, n.d.]. This result set a precedent that became what Michel Foucault would regard as the foundation or founding of a new point of ‘discursivity’ [Foucault 1991]. That is to say, the legal concept planted a seed that would grow into an entire field informed and organised by it – new outlooks, worldviews, thought process and life practices. Self-defence developed into discursive constellation with many outcomes for the contemporary world: from reasons to take children to martial arts classes to the emergence of paramilitary communities of self-defined self-defence subjects, such as survivalists, whose entire lives involve constant training, vigilance, preparation for potential conflict, and the paranoid weaponising of self and daily life, in what Caroline Light calls the production of the contemporary figure of the ‘DIY self-defence subject’ [Light 2017]. This present study does not focus on twentieth century developments, but traces a genealogy that takes us to its threshold.

FOCUS, CAVEATS AND QUALIFICATIONS

This is not to suggest that the genre of self-defence texts discussed here came from nowhere, or that the texts and authors considered here were the first to write about preparation for combat.¹ To the contrary, many societies and cultures have long traditions of writing about various kinds of both hand-to-hand and military or group combat that stretch back far further than the seventeenth century – where this present study begins [Lorge 2012; Jaquet 2018].² But, my suggestion is that the practices we now know as self-defence, and particularly the types of writing that we now recognise as self-defence books and manuals, are all part of a field that was enabled by the birth of a stable legal concept in the seventeenth century.³ From there it grows into a prominent discursive entity. Put differently, it was neither simply duelling nor an interest in military strategy, and certainly not an investment in the notion of ‘sport’, that produced such cultural phenomena as the martial arts explosion of the late twentieth century (although these influences cannot be denied). It was rather a much more deeply rooted and long-running cultural preoccupation with interpersonal self-defence. This preoccupation was arguably born with urban modernity, and ac-

1 For further reflection on this point, please see footnote 2 (below) and the coda on the limitations of this study, which concludes this article.

2 For instance, long before the 1604 starting point of this study’s focus, there was an officially recognised company of fencing and ‘defence’ masters in England – the London based ‘Company of Masters of the Science of Defence’. This was first documented in 1540 and existed through to 1623 as a professional organisation. As noted by Dodsworth [2015, 96], George Silver’s *Paradoxes of Defence* was published in 1599 (i.e., before Coke’s Report), and there were fencing schools and ‘Masters of Defence’ teaching before this time [95]. Thanks to Eric Burkart and Francis Dodsworth for these points.

3 On the formation of new concepts and their impact on reality, see Barry [2001].

cordingly it may well endure, for as long as the features that produced it continue to prevail [Seshagiri 2006; Massumi 2010; Godfrey 2012; Little 2018; Bowman 2021].

The focus in this article is on English language 'self-defence' books,⁴ primarily published in England, although some mention is made of American texts where relevant. Despite its title, throughout this article, the term 'England'/'English' is used more than 'Britain'/'British', as the latter term is vague. It has shifting definitions, borders and meanings, and the national regions of Britain continue to have their own histories and laws. Furthermore, the history of book publication within Britain was long dominated by a few metropolitan centres, most notably London.

Of course, this is not to posit the idea that 'English' self-defence was a self-contained entity. There have always been numerous forms of regional and foreign influence, international information and cross-culturally shared ideas. Texts and practices on training with various weapons (most notably the sword), as well as boxing and wrestling, have long-nourished the nascent self-defence discourse in (what was most usually called) 'England' both before the seventeenth century and after [Aylward, 1949, 1956]. Influences came from diverse international and disciplinary quarters: the long traditions of European 'fight books', for instance, knowledge of military training, and amateur weapons-training, etc., have all informed English/British writings on self-defence.⁵ But, this study limits its focus to English language, British/English publications. It does so in order to trace the shifting contours and to glean an insight into the development of the genre of writing and the discourse of practice in one national context through time, regardless of how multicultural, cosmopolitan, or indeed parochial or isolated it may have been.

In doing so, however, my approach slices through the publication landscape at a potentially controversial angle, ignoring historically or currently agreed ways of categorising publications of the period, and also arguably projecting and looking for a contemporary genre of writing (self-defence books or manuals) backwards in time, into a period

when such a genre did not exist in quite the way we think of it now. I do so not in order to survey the tributary genres of writing that fed into the growth of today's genre of self-defence manuals, but in order to explore the features of the most blatantly obvious forerunners of modern self-defence manuals. My sense is that many of the insights gained here about the elaboration of self-defence discourse in Britain will be comparable to the situation in other national contexts of this period. But individual studies of discrete countries will be required to establish the true extent of similarities and differences.

My argument is that, in Britain, the key event that enabled the emergence of modern self-defence discourse as we know it takes place in 1604: a man is tried for an assault and exonerated on the basis of the judgement that he had a *right to defend himself in his own home*. These three conceptual coordinates – the self, the home, and the right to defend them – continue to prove important to any cultural analysis of self-defence [Coke 1600; Light 2017].

At the other end, my argument is that the most pertinent point at which to end this study is 1904. This is because 1904 is the year in which self-defence discourse and publication began to be overtaken and transformed by the publication of texts about and teachers of the Japanese art of *jujutsu*. Many transformations occurred at this point, including the arrival of many more women on the self-defence publication scene, and the growth of orientalism (and anti-orientalism) in and around self-defence and – by the 1970s – what were called 'martial arts' [on orientalism, see Said 1978]. To take all of this into consideration in the space of a single article would require a very different and more condensed approach. Furthermore, the histories of jujutsu, judo and other East Asian martial arts in the West have already been well documented and studied [Godfrey 2012; Krug 2001; Yabu 2018; Bowman 2021].

None of this is to suggest that what we would now recognise as 'self-defence' began in 1604 with this legal case and ended in 1904 with the arrival of jujutsu. It is simply to pinpoint two historical moments whose effects induced different kinds of tectonic shift in the landscape, each in

4 To use linguistic terms: the article follows a *semasiological* approach, i.e., proactively looking for the term 'self-defence'. It therefore omits publications that do not use this term but that we might, in a broader (*onomasiological*) perspective, still deem to be concerned with 'self-defence', qua physical training for interpersonal combat.

5 See for instance, Giacomo di Grassi: *Giacomo di Grassi his True arte of defence plainlie teaching by infallable demonstrations, apt figures and perfect rules the manner and forme how a man without other teacher or master may safelie handle all sortes of weapons aswell offensiue as defensiue: vvith a treatise of disceit or falsinge: and with a waie or meane by priuate industrie to obtaine strength, iudgement and actiuitie. First written in Italian by the foresaid author, and Englished by I.G. gentleman* [di Grassi 1594]; Vincentio Saviolo: *Vincentio Saviolo his practise. In two booke. The first intreating of the use of the rapier and dagger. The second, Of honor and honorable quarrels* [Saviolo 1595]; and George Silver: *Paradoxes of defence, : wherein is proved the true grounds of fight to be in the short auncient weapons, and that the short sword hath aduantage of the long sword or long rapier. And the weaknesse and imperfection of the rapier-fights displayed. Together with an admonition of the noble, ancient, victorious, valiant, and most braue nation of Englishmen, to beware of false teachers of defence, and how they forsake their owne naturall fights: with a briefe commendation of the noble science or exercising of armes* [Silver 1599].

their own way radically transforming the conceptual and practical coordinates of practices, and in fact generating, in the first case, a *paradigm*, and in the second, a paradigm *shift* [Kuhn 1962]. As such, our concerns are neither with the earlier tradition of ‘fight books’ nor with the much more recent phenomenon of ‘martial arts’. These have vastly different temporalities, histories and coordinates. The focus here is the growth of self-defence as a *discursive entity*. The argument is that the enduring contours and coordinates of this discursive entity were elaborated during the three-hundred-year period in question, and that this is registered in books that self-consciously style themselves as contributions to self-defence discourse.

INTERPRETIVE FRAMEWORK

In using such terms as ‘discourse’ and ‘discursive entity’, this study is clearly informed by scholarship in the conceptual and theoretical tradition of Michel Foucault [also Laclau and Mouffe 1985; and Hall, Morley, and Chen 1996]. This theory and its vocabulary is applied to help conceptualise and interpret the nature of changes that can be seen within and across the pages of the various books discussed. Along with the theoretical notion of discourse, discursive entity, discursive constellation, etc., the study also makes use of a tripartite framework once proposed by Raymond Williams as a rubric for interpreting movements and changes of value and orientation in cultural history. This approach involves establishing whether a given practice or value is *dominant*, *residual*, or *emergent* within a context [Williams 1977].

The primary observation made within this historical survey of English self-defence books is that in this context, self-defence is a discursive entity validated by the legal right to defend one’s ‘self’ within one’s ‘home’. The ostensibly literal denotative terms ‘self’ and ‘home’ actually prove rather plastic or connotative, meaning that the ‘self’ and the ‘home’ to be defended can be constructed on any scale, from the most private (house) to the most public (society, the land, the people, the nation, etc.). In fact, tracing the development of this discourse provides a fascinating case of ‘function creep’, from the literal to the metaphorical, the private to the public. The subject of ‘how to defend yourself’ quickly becomes intertwined with cultural concerns as diverse as bravery, morality, honour, health, fitness, diet, nationalism, patriotism and even appreciation for the finer things in life, from ale and sherry to ‘fellow-feeling for our common nature’.

THE BIRTH OF LEGAL SELF-DEFENCE

To recap: the key event in the birth of the legal concept of self-defence in English common law (and initially thereafter also in America) occurs in a case that culminated 1604. It was definitively confirmed as law in 1628. What occurred is that a man was tried for assaulting an agent

of the law who had entered his house without identifying himself. At the culmination of the court case, the judge exonerated the man and decreed (in Latin): ‘The house of every one is to him as his castle and fortress, as well for his defence against injury and violence as for his repose’ [qtd in Light 2017: 20]. As a consequence of this verdict, thereafter in English law the context of ‘hearth and home’ became a location in which even lethal self-defence *could – perhaps –* be legal. This became known as the ‘castle doctrine’. Famous sayings such as ‘an Englishman’s home is his castle’, or ‘a man’s house is his castle’, and so on, principally refer back to this ruling.

In English self-defence law, a subject still often has an obligation to try to retreat or escape from an assailant. However, sometimes, at least, the one place you might justifiably stand your ground is in your own home. This idea was initially exported and instituted in the legal systems of America and other British colonies, but by the early nineteenth century, American law began to be modified in ways that were much more amenable to the rights of *certain kinds* of citizen to stand their ground and fight back – or even to pursue someone – regardless of where they may be.⁶

After passing into English common law, the term ‘self-defence’ began to appear in diverse contexts. The first usage given by the *Oxford English Dictionary* is 1609. Thomas Hobbes refers to it in *Leviathan* in 1651 [II. xxi. 113]. And throughout the seventeenth century, the term increasingly appears in book titles. Initially, the term was used in ways that were chiefly allegorical. The books themselves were not about self-defence in the physical embodied sense. They were rather about such matters as the defence of a political or religious doctrine or institution. For instance, Abednego Seller’s 1680 work, *The History of Self-Defence, in Requit to the History of Passive Obedience* [Seller 1680], is a defence of the Church of England. Similarly, *An Argument for Self-Defence; Written about the Year 1687, Never before Published, and Now Offer’d to the Consideration of the Gentlemen of the Middle-Temple* [Anon. 1687] is a 16-page text that does actually discuss the justifications for self-defence, including the rationale for and right of an individual to kill an attacker in order to preserve their own life. However, it does so principally as an extended analogy: its ultimate interest lies in reflecting allegorically on the rights of the citizenry to depose a ruler who seeks to attack the social body politic.

In other words, although such early arguments incorporating ‘self-defence’ do employ the notions of physical, embodied, face-to-face self-defence, they do so chiefly as an image to help depict and discuss struggles that are social, political, institutional or ideological, rather than embodied and interpersonal. Nonetheless, what such books clearly demonstrate is the sense that lethal self-defence can be a justifiable action in extreme circumstances. *An Argument for Self-Defence* clearly compares the situation of a ruler who seeks to attack the body politic

6 Light argues, in her study of the history of US self-defence law, that the ‘certain kinds of citizen’ who have most been able to stand their ground or even pursue and kill supposed threats with impunity have always been propertied white men [Light 2017]. Other kinds of citizen, by contrast – i.e., non-white men and women – continue to be convicted for acting in the same way, in the USA.

of a society to the image of an attacker that an individual is forced of necessity to kill in order to stay alive. It insists on the necessary legality of such self-defence, appealing to notions of sovereignty, survival and a just law.⁷ The text makes this argument less than four decades after Thomas Hobbes first invoked the individual's 'inalienable right' to self-defence [Light 2017: 19]. As Light notes: 'Enlightenment thinkers, such as Thomas Hobbes and John Locke' were interested in self-defence principally in relation to challenging 'the monarchy's monopoly on lethal punishment' [Light 2017: 19]. In this light, the topic of individual self-defence emerges in relation to reflections on individual sovereignty, citizenship, the monarch or state, and the law. These have proven to be enduring coordinates for self-defence discourse in British and other national/legal contexts.

HONOURABLE CULTIVATION

By 1714, two publications illustrate a clear expansion and deepening of the discourse on and around self-defence. The first is Sir William Bart Hope's book, *A vindication of the true art of Self-Defence, with a proposal to the honourable members of parliament, for erecting a court of honour in Great Britain. Recommended to all gentlemen, but particularly to the soldiery. To which is added a short, but very useful memorial for sword men* [Hope 2005]. This text appeals not only to the right to self-defence, but also importantly to ideals of honourable conduct, behaviour and – significantly – the value of *training* for the development of self-defence capacities. In other words, in this text, self-defence is explicitly linked to self-cultivation.

In the same year, Sir Thomas Parkyns' book appears: *The Inn-Play, or Cornish-Hugg Wrestler Digested in a Method which Teacheth to Break All Holds, and Throw Most Falls Mathematically; Easy to be understood by all Gentlemen, & c. being an excellent Acquisition to the Science of Self-Defence, and of Great Utility to such who understand the Small-Sword in Fencing* [Parkyns et al. 1714]. This book draws strong connections between training, body, character and also diet. On the dedication page, the author enumerates a list of character traits and dietary habits necessary to become a successful wrestler, along with the entry requirements to be met before the author would accept someone as a student. These criteria include the delightful declaration: 'I'll scarce admit a sheep-biter, none but beef-eaters will go down with me, who have robust, healthy and sound bodies'.

Thus, it is apparent that by the time of the appearance of these texts, self-defence is no longer simply a potential legal right that a defendant could plead in court *after an event*. Rather, self-defence can become

the pretext justifying a process or a project of training, long *before* any potential event. Along with this switch from retrospective to future-facing in the status of self-defence, the sense of *honour* attached to it has grown. Honour was perhaps always implicitly attached to the legal concept, given the connotations of the word 'right'. But now it is also explicitly connected with bravery.⁸

Combining these coordinates: honour is by now not merely something deriving from a *spontaneous act* of bravery. Rather, it has become something that can (and 'should') be *trained and developed*. The key point here is that – even if self-defence is given as an alibi, pretext or 'end-goal' of training (or 'preparation for violent conflict', as Wetzler puts it [Wetzler 2015; 2018]) – such 'training' is no longer *simply* a future-orientated teleological or eschatological preparation for a possible future problem. Rather, training is now open-ended. It is training in the sense of *cultivation*. Self-defence training is now said to cultivate honour. Honour has thus itself grown to become part of the organising and orientating rationale. Standing shoulder-to-shoulder with technical know-how (*savoir-faire*), honour is now another quality that will be developed via (to echo Foucault [1977]) 'the means of correct training'. The cultivation of honour further justifies the practice of training, along with technical skill and improvements in physical health and strength. As such, although it is the term 'self-defence' that is elevated to prominence in such book titles, in a sense, *literal* self-defence is by now only one of the growing number of potential *cultural* values and virtues to be accrued via self-defence training. By now, extra ('supplementary') values are appearing, in the realms of moral and physical character. To use Sloterdijk's terms, this kind of activity (training 'for' self-defence) now becomes an anthropotechnic lifestyle choice [Sloterdijk 2013], one based on a variant of the injunction 'you must change your life!' and that generates what Sloterdijk calls the 'accumulation of subjectivity' [Sloterdijk 2020: 16–17].

HAGIOGRAPHIC NOSTALGIA

Given the emergence of honour as a theme of self-defence orientations, it is unsurprising that the eighteenth and early nineteenth centuries also see the fusing of hagiography with self-defence manuals. Fighting manuals are combined with biographies, such as Donald McBane's *The Expert Swordsman's Companion: or the True Art of Self-Defence with an Account of the Authors life and his transactions during the Wars with France. To which is annexed the art of gunnerie of 1728* [McBane, Duncan, and Duncan 1728], through to Henry Angelo's *Treatise on the utility and advantages of fencing: giving the opinions of the most eminent authors and medical practitioners on the important advantages derived from the knowledge*

7 Indeed, as criminologist Francis Dodsworth puts it: 'fighting was commonplace and historical research on duelling and boxing (see, e.g., the work of John Carter Wood or Bob Shoemaker on later periods) suggests that even where deaths occurred in fights, if it was considered a fair fight, prosecution and punishment were rare or minimal. Lower-level assault in general was often treated as a civil issue as a dispute between private persons, rather than something the Crown should be involved in (see Peter King, 'Punishing Assault' [1996]). Most assaults were not, after all, fatal. Equally, most people travelling long distances, or at night, seem to have routinely armed themselves against footpads / thieves etc.' [Dodsworth: personal communication].

8 In personal communication, Dodsworth notes: 'These self-defence manuals were part of a much wider literary culture of self-help which seems to me to have targeted a socially aspirant readership, or to have provided handy instruction for tutors, etc. It's difficult to escape the social significance of the concept of honour and its initial relation to gentility, both in terms of duelling and social differentiation from the vulgar, in a period in which gentility was relatively in flux and ideas about self-shaping and gentility as behaviour not breeding were important' [see also Dodsworth 2015, 95–99; 2019, 172ff].

of the art, as means of Self-Defence, and a promotor of health, illustrated by forty-seven engravings. To which is added a dissertation on the use of the broad sword (with six descriptive plates), in 1817 [Angelo 2019].

It is interesting that McBane's hagiographic account of a life of 'der-ring-do' has attracted recent republication in the twenty first century [McBane, Kerr, and Farrell 2015]. It is likely that this is either because the kinds of interest that certain demographics or readerships have in such tales endures to this day, or because this structure of interest has recently returned. Such texts certainly feed some contemporary kinds of nostalgia for times lost, as can also be seen in the interest that has grown in Historical European Martial Arts (HEMA) over recent decades. This interest is a comparatively recent phenomenon, one that cannot therefore be divorced from the possibility that it reflects a symptomatic nostalgic yearning for lost cultural roots [Chow 1995; Pitcher 2014; Bowman 2021].

However, even without diagnosing the question of the contemporary interest in such historical material, nostalgia can actually be detected in the very fabric of these texts. For instance, Angelo's *Treatise* begins with a sustained reflection on the values and virtues of fencing for the improvement of health and physique. This is not merely articulated 'in general'. Rather, the author explicitly connects what he regards as a kind of epidemic of problems related to health and posture with the growth of industrialisation and urbanisation. Fencing and combat training will help to remedy these diseases of modernity, insists the author. As such, the focus on the ancient art of fencing in an age of burgeoning industrialisation already clearly smacks of nostalgia. This is not to say that Angelo's sword-focused self-defence manual is not an 'authentic' text of an ancient and venerable tradition. Rather, the fact that the author pitches sword training as a ('residual') way to remedy modernity's ('emergent') problems transforms its status: the sword self-defence manual itself, orientated in this way, can be read as a *symptom* of cultural change. Its valorisation of a former residual culture is a functional kind of cultural nostalgia – a symptomatic response to modernity [Williams 1977].

SPORT AS SELF-DEFENCE

As the nineteenth century progresses, boxing becomes the focus of many self-defence books. For instance, 1819 sees the publication of Robert Cruikshank's *The Art and Practice of Self-Defence; or, Scientific Mode of Boxing, Displayed in an Easy Manner, Whereby Every Person May Comprehend This Most Useful Art, without the Aid of a Master: To Which Is Added, Descriptions of Pugilistic Attitudes, Also the Art of Attack, as Practised by the Most Celebrated Boxers of the Present Day. Got up under the Superintendance of a Celebrated Pugilist. With an Index* [Cruikshank 1819].

As evinced by this title, boxing is undoubtedly positioned here as a *sport*. (And 'sport' is widely recognised as having been of the British Empire's major cultural contributions to nineteenth century physical culture [Elias and Dunning 2008].) Yet this *sport* is also positioned as representing the pinnacle of *self-defence*. Doubtless this is because of a conceptual conflation that still exists – a spurious equation, that remains extremely tenacious, reappearing frequently whenever people attempt to appraise combat sports in terms of their utility for self-defence. The essential form of this amphibology runs as follows: *this looks like (how we imagine) a 'real fight' to look; therefore it must be useful (or at least advantageous) in a 'real' fight*. While any Venn diagram covering the similarities and differences between such a combat sport and *some* (socially structured) forms of 'real' combat *may* overlap in *some* contexts, there is of course a world of difference between many possible violent/attack scenarios and the closed context of the boxing ring [Miller 2008].

Related to this, and as if implicitly anticipating Norbert Elias's arguments about the 'civilising process' *avant la lettre*, many nineteenth century authors who advocate boxing as a form of self-defence do so primarily via a conceptual sleight of hand, or register-switch – one that we have already seen. This involves arguing that self-defence training leads to the development not only of healthy bodies, but also of moral character. At the same time, however, aside from such considerations of honour and vigour, there is very little in these texts that relates to anything that contemporary readers might recognise as *psychology*. The manuals present *techniques*, and through training in these techniques what will be learned is 'self-defence' *ability* and – somehow – also *honour*. Yet, there is no discussion of any of the psychological dimensions currently associated with conflict. So, where one might expect to find in a contemporary self-defence book or study of interpersonal violence some kind of considerations of factors such as (pre-)fight fright or freeze, and/or post-conflict traumatic aftermaths, etc., one only finds discussions of honour versus degeneracy.

FOREIGN BLADES AND MORAL DEGENERACY

This is not to say that something akin to 'fear' is never evoked in these texts. Such affects are often incorporated rhetorically by authors. For instance, Owen Swift's 1840 *Hand-book to Boxing Being a Complete Instructor in the Art of Self-Defence* [Swift 1840] is initialised and orientated in terms of a declared sense that there is a worrying increase in knife crime. In his preface, Swift explicitly connects the use of bladed weapons with dishonourable Southern European tendencies, suggesting that the provision of more boxing training for British youth would strengthen the nation, both figuratively and literally, in terms of developing the literal physical strength, technical ability and (crucially) the honourable characteristics of the people.⁹

⁹ Swift would go on in 1848 to publish the radically auto-didactic text, *The Modern English Boxer, or, Scientific Art and Practice of Attack and Self-Defence: Explained in an Easy Manner That Any Person May Comprehend This Useful Art without the Aid of a Master with Descriptions of Correct Pugilistic Attitudes as Practised by the Most Celebrated Boxers of the Present Day*. Obviously, the claim that a book could substitute for a living breathing teacher, instructor or master is one of the two main ways to justify the publication of a manual – the other being that the text is a *supplement* to the 'primary' pedagogical scene of face-to-face teaching.

Even more clearly in this vein, Egan Pierce develops the theme in *Every Gentleman's Manual. A Lecture on the Art of Self-Defence* [Pierce 1845], first published in 1845 and republished in 1851. Pierce's earlier book on pugilism, *Boxiana; Or, Sketches of Ancient and Modern Pugilism* [c.1824] had been a somewhat sprawling and rambling affair [Egan 2013], but by the time of *Every Gentleman's Manual*, he had evidently found his focus and warmed to the theme of the wider significance of boxing. Thus, from the outset, the text is preoccupied with the advocacy of fair play and of articulating this with British character and from there on to the promotion of nationalism. As with Swift's earlier text, Pierce's preface begins with a discussion of what we would now call the *moral panic* around 'stabbing' in the 1840s [Godfrey 2012; 2010; Thompson 1998]. The very first paragraph of the book proper declares:

The Art of Self-Defence viewed as connected with Health, and renovation of the Human Frame to its natural quality – the excellence of it as an Exercise – also its advantages on the Spirits; but above all to infuse a noble Spirit in the Mind of Man, to act nobly on all occasions – to curb the passions – and to put a stop to the assassin-like conduct of introducing the knife! [2]

Beyond his claim that a boxing habitus would minimise the chance of a trained pugilist introducing a blade into a conflagration, along with idealistic and ideological pronouncements about character, Pierce also focuses on some of the more verifiable outcomes of regular training. He argues that the 'advantages attendant upon it as a manly science' include 'the promotion of good health' [9]. In a passage that bears many features that are still present in contemporary self-defence texts, we read:

With the use of the dumb bells for a few minutes every day, and an hour's exercise with the gloves, the formation of the chest expands, the wind is altogether improved, and loose fat is avoided increasing upon the frame. The mind becomes cheerful because the spirits are improved. Additional vigour of body is obtained from such exertion; an individual also gains activity upon his legs, he loses sight of fear, his courage improves daily, and he like wise becomes a more animated and energetic creature in society. But the grandest point of all is, that he is always prepared for an enemy, – I repeat it, he is always prepared for an enemy, – let the latter appear before him when he will. [9]

To the literary, historical or cultural studies scholar whose work consists in discovering and exposing the ideologies that permeate texts and contexts, searching Pierce's text for its ideology is like shooting fish in a barrel. This is because Pierce wears his heart on his sleeve to such an extent that the work of 'ideology critique' is almost redundant. He spells it out for us: his object is to use pugilistic training 'to keep alive the principles of courage and hardihood which have distinguished the British character, and to check the progress of that effeminacy which wealth is too apt to produce' [14]. Pugilism also offers an alternative to duelling with weapons, which Pierce finds barbaric and unjust in many ways. As he argues, one 'ought to deprecate the consequences of duelling in society, the reflection is dreadful to read of the prevalence of STABBING, in a country distinguished for its love of fair-play' [23].

Weapons, he believes are often guilty of 'uniting cruelty with cowardice, and too often assumes the shape of murder' [23]. On the other hand: 'athletic exercises have done much towards giving a sort of perseverance and never-tiring courage to the army of England – and with a coolness of demeanour that defies the pen to do justice to' [30].

Enthused by his topic, Pierce hesitates, almost wavers, but then takes the plunge into suggesting what he most wants to suggest:

Perhaps it is not too much to assert, that owing to the pugilist's anxiety to acquire celebrity in the prize ring, we may have been indebted in some degree for the glorious victories of Trafalgar, Waterloo, &c. &c., and I feel assured that athletic sports have had a direct tendency to inspire additional confidence and courage in the breasts of our soldiers and sailors. [27]

Even so, the key virtue or value singled out for special note is not related to the stimulation of competitive, sporting or military zeal. Rather, Pierce proposes that pugilistic training can inculcate and promote 'gentlemanly' qualities, that help enrich and deepen the bonds between 'men':

Men of rank associating together learn to prize the native and acquired powers of human nature; they thus learn to value other distinctions, besides those of fortune and rank; and by duly estimating them in persons of inferior stations of life, they imbibe the principles of humanity and fellow-feeling for our common nature. [14]

SELF-DEFENCE AS HOLISTIC TECHNOLOGY OF THE SELF

By the mid-nineteenth century, as evidenced by such published accounts as these, the discourse of self-defence was becoming 'holistic'. That is to say, 'self-defence' becomes a fully-fledged *discursive entity* [Bowman 2021] – ever expanding, 'ever-unfolding' – akin to Knorr-Cetina's description of the ever-deepening and ever-unfolding behaviour of 'objects of knowledge' in the eyes and hands of those who study them [Knorr-Cetina 1981; 2003; Spatz 2015]. A discursive entity grows in more than one dimension, realm or register. We can see this in the change that takes place in the shift from self-defence articulated as *simple pragmatic aim or alibi for training* to self-defence as *becoming nothing more than the process of that training*.

The initial and initialising alibi, rationale or justification (defence of the self) accrues new travelling companions. Training becomes no longer simply a pre-emptive protective measure focused on a possible future event in which self-defence might be needed. This would be what Peter Sloterdijk would call an 'auto-immune' response to a perceived potential existential threat. In this sense, training for self-defence would be akin to the taking out of an insurance policy [Sloterdijk 2013; see also Wetzler 2018]. Rather, training becomes a process of *self-development* – rewarding for its own sake, enjoyable for its own sake. In psychoanalytic terms, the discourse of self-defence at this point moves decisively

from *desire* to *drive* [Žižek 2005: 10]. That is, it is no longer approached with direct reference to a clear and present, immediate achievable goal (*desire*); instead, its practice becomes more focused on the pleasure and pride to be taken in perfecting the practice itself (*drive*).¹⁰ 'Preparation' for self-defence becomes an ongoing process – a habitus, a discipline, a way of life, with its own world of values. It becomes rewarding and absorbing in and of itself.

In the textual description of physical training practices, we see training regimes expanded in scope to include supplementary extras, such as weight training and aerobic activities, to the keeping of regular daily routines, to adhering to specific dietary considerations. Self-defence training becomes explicitly connected with the promotion of improved musculature, posture, vigour, vitality and health, and is thereby implicitly connected with the nascent physical culture that emerged in the late nineteenth century in the USA, as well as European and other nations [Chaline 2015; Miracle 2016]. But it is equally explicitly connected with the development of the ideal gentleman: honourable, brave, nationalistic, and full of 'fellow-feeling for our common nature'.

Variants and versions of this were maturing in many modern(ising) national(ising) contexts, albeit in different ways and at different 'speeds' [Alter 1992; Morris 2004; Chaline 2015; Miracle 2016]. To glance briefly at America, for instance, in 1867 Edmund Price published *The Science of Self Defence: A Treatise on Sparring and Wrestling including complete instructions in training and physical development, also several remarks upon, and a course prescribed for the reduction of corpulency* [Price 1867]. This fascinating book claims the status of being 'the first' in many respects, few to none of which are true. This in itself is noteworthy, because it suggests either an inability to access earlier publications on self-defence (whether from the UK, the US or elsewhere), or a lack of interest in reading or referring to them. If the former (lack of access), this suggests that self-defence discourse was emerging and developing in different isolated individual contexts, *but in similar ways*, presumably for shared reasons, most likely related to the growth of urban modernity in diverse countries. If the latter (lack of interest in reading around the subject), this would certainly not be the last time that someone writing on the subject of self-defence – or, more recently, 'martial arts' – would do so without carrying out even the most perfunctory literature review, while yet claiming to be the very first to write on the subject.

In any case, this often inadvertently hilarious text proceeds in apparent ignorance not only of earlier works on the same subject, but also in absolute ignorance of all discourse on diet, body mechanics, physiology and training principles *per se*. Again, this has remained a characteristic of much self-defence and martial arts writing: there are still authors who not only claim to be the first to write on the subject, but who also feel compelled to comment on topics that fall far outside of their competence and knowledge.

¹⁰ As Slavoj Žižek explains: 'let us imagine an individual trying to perform some simple manual task – say, grabbing an object that repeatedly eludes him: the moment he changes his attitude, starts to find pleasure in just repeating the failed task (squeezing the object, which again and again eludes him), he shifts from desire to drive' [Žižek 2005, 10].

Thus, in *The Science of Self Defence: A Treatise on Sparring and Wrestling*, we encounter such idiosyncratic features as the book being organised in terms of *limbs* – with one chapter focusing on one limb, the next chapter focusing on another limb, and so on. Thus, there is a chapter on the leg, a chapter on the arm, a chapter on the head, and a chapter on the torso – each considered in isolation. There is no overarching sense of the body as one coherent functional unit. Rather, we are told that it is the arms that punch and the feet that move (not the whole body). The head, we are told, should be positioned 'carefully' (with no further clarification); and, we are told, the body (torso) should definitely not be 'irksome'!

In this way, the book provides a cornucopia of entertaining and irreducibly quaint formulations. For instance, of the right cross punch, we are told: 'At a cross-counter or in fibbing, the right hand is the more destructive of the two; this arises from the greater precision and strength which that hand, arm and shoulder generally possess' [43]. Elsewhere, Price claims: 'No book on training that has yet appeared attempts to give a physiological account of respiration' [104] – before proceeding to give nothing of the sort, while demonstrating almost absolute ignorance of any kind of science of respiration (for which, see Williams [2021]). And, perhaps most delightful of all, within the many wide-ranging discussions of diet and exercise, a favourite theme frequently engaged is the perhaps unfairly neglected topic of precisely when and how much ale and sherry needs to be drunk, before, during, and after training.

A GATHERING STORM

Many of the self-defence publications of the final decades of the nineteenth century focused on the traditional European staples of boxing and wrestling, along with occasional sword and more frequent stick and staff manuals. Clayton's 1878 publication captures this nexus in its title: *The Three Arts of Self Defence: Fencing, Broadsword Exercise, Boxing* [Clayton 1878]. Similarly, 1880 gave titles such as Ned Donnelly and John Musgrave Waite's *The Science of Self Defence, or, The Art of Sparring or Boxing Taught Easily without a Master: With Illustrations Showing the Various Blows, Stops, and Guards* [Donnelly and Waite 1880] and anonymous titles such as *Boxing and Wrestling: or, The art of Self-Defence* published by De Witt in New York and Griffith, Farran & Co. in London.

Perhaps the key feature of this now mature discourse are the growing connections made between self-defence training and an ever wider orbit of physical and cultural 'technologies of the self' [Foucault 1988]. This is made apparent in works such as Henry Llewellyn Williams' 1883 *The art of boxing, swimming and gymnastics made easy, giving complete and specific directions for acquiring the art of Self-Defence, swimming, and a large variety of gymnastic exercises enabling any one to become an expert boxer and athlete without the aid of a teacher* [H. Ll. Williams 1883]. Also

immediately visible here is another dimension that is echoed across numerous titles in this canon: namely, the regularly reiterated but essentially pedagogically subversive claim that one can 'learn without a master' [Rancière 1991; Bowman 2016]. The discourse of self-defence was to continue in all of these directions, even after the arrival of the gathering storm of the paradigm shift that would take place at the birth of the twentieth century.

But, until the final years of the nineteenth century, familiar forms of texts continued to appear, through the 1880s and 1890s, including titles such as Owen Swift's *Boxing without a Master, or, The Art of Self Defence* from the USA in 1885 [Swift 1885], and 1889's *Broadsword and Singlestick, with Chapters on Quarter-Staff, Bayonet, Cudgel, Shillalah, Walking-Stick, and Other Weapons of Self-Defence* by Rowland George Allanson-Winn and C. Phillipps-Wolley [Headley 1890; Headley and Phillipps-Wolley 2006]. As is by now predictable, such books frequently open with a discussion of Englishmen/gentlemen as exemplary sportsmen, and of sports' ability to be turned to the as-if self-evidently valuable end of saving or advancing the nation. *Broadsword and Singlestick* even opens with what might now be recognised as a 'hopological' (i.e., pseudo-scientific) quasi-sociobiological argument which proposes that, it was stones that were first used as weapons by cavemen, and that immediately thereafter something like the quarterstaff was the next weapon of choice adopted by all humans, and that therefore the quarterstaff is to be regarded as the origin of all weapons. This is followed by an in-depth discussion of the history and style of different swords. This kind of essentialist pseudo-scientific origin story remains a stock feature in much amateur scholarship on what is sometimes called hopology or indigenous martial/combat history. However, the work also includes an advocacy of the importance of what we would now call situational awareness and body-language in self-defence – matters that would be allotted increasing importance in self-defence discourse in the late 20th and early 21st centuries. The final words of the book are:

In the environs of our big cities there is always a chance of attack by some fellow who asks the time, wants a match to light his cigar, or asks the way to some place. When accosted never stop; never draw out watch or box of lights, and never know the way anywhere. Always make a good guess at the time, and swear you have no matches about you. It is wonderful to notice kind-hearted ladies stopping to give to stalwart beggars who are only waiting for an opportunity to snatch purses, and it would be interesting to know how many annually lose their purses and watches through this mistaken method of distributing largess.

Let me conclude by saying that, if you want to be as safe as possible, in a doubtful neighbourhood, your best friends are a quick ear, a quick eye, a quick step, and a predilection for the middle of the road. The two former help you to detect, as the two latter may enable you to avoid a sudden onslaught. [Headley 1890, p.116]

Such publications were by now the 'business as usual' stock in trade of a well-established genre of self-defence publishing. This continued uninterrupted in its European focus until 1898. However, this penultimate

year of the nineteenth century saw the appearance of what we might now regard as a kind of 'transitional' text – or what Fredric Jameson might call a 'vanishing mediator' [Jameson 1973]. This was Georges d'Armoric's *Les Boxeurs français's treatise on the French method of the noble art of self defence: with a short chapter on 'canne'* [d'Armoric 1898]. This book is 'transitional' in that it introduces the Swiss cane and walking stick method of fighting ('la canne') to an English readership. La canne was one of the key European 'ingredients' to the then-emergent combat style, as was being promoted by Edward William Barton-Wright in London, known as Bartitsu. Thus, d'Armoric's text was a vanishing mediator in the sense that what it introduced was immediately surpassed and overwritten or erased by the very thing it enabled. In this case, it was Bartitsu, which eclipsed both savate and la canne as popular approaches to combat in Britain. Bartitsu first fully appears in book form the following year, 1899, which sees the publication of Barton-Wright's text, *The New Art Self-Defense – How a Man may Defend Himself against every Form of Attack*. The ultimate irony, however, is that Barton-Wright's own Bartitsu would itself quickly go on to 'mediate' and then 'vanish' – washed away from view by the explosion of interest in the Japanese jujutsu that Barton-Wright himself was largely responsible for introducing to the British public [Godfrey 2012; Bowman 2021].

These books – especially the latter – are significant because, although 'older' styles of self-defence text continued to be produced, from this point on, an increasing number of self-defence books began to focus on approaches to hand-to-hand combat and self-defence drawn not merely from other European countries (such as Switzerland and France) but also from 'the mystical East' – primarily Japan. Thus, although through early twentieth century self-defence books continued to appear that would make absolutely no reference to Japanese 'jitsu' or 'jutsu' dimensions – it was only very much later (in the 1970s) that such practices would come to be widely referred to as 'martial arts' [Bowman 2021] – the seeds were nonetheless sown for, first, the jujutsu and, thereafter, the judo paradigm revolution in self-defence discourse [Godfrey 2012; Yabu 2018; Brough 2020]. Self-defence discourse through the twentieth century would become increasingly 'orientalised' – or, rather, *orientalist* [Krug 2001; Bowman 2017; 2021].

However, all texts are products of their times. This means that even self-defence books that (whether accidentally or intentionally) made no reference to the new Japanese 'jutsu' and 'judo' influences arriving on the scene in the early twentieth century could not avoid registering wider cultural changes in one way or another. A case in point is Robert Fitzsimmons and Anthony Joseph Drexel Biddle's *Physical Culture and Self-Defense* of 1900 [Fitzsimmons and Biddle 1900]. This book explicitly connects self-defence training to the growing 'physical culture' movement, signalling the maturation of immanent trajectories first clearly visible in the early nineteenth century [Miracle 2016].

Similarly, 1903's *Self-Defence: being a guide to boxing, quarter-staff and bayonet practice, the walking-stick cudgel, fencing, etc. ... With fifty outline illustrations and diagrams* by Rowland George Headley, Allanson-Winn Baron, and Charles Edward Angler Walker [Winn and Walker 1903] arguably demonstrates the complex intermixing of what Raymond

Williams would call different *dominant*, *residual* and *emergent* cultural forces, textures and patterns [Williams 1977]. This is because the book clearly references the older (but still *dominant*) traditions of boxing beside the (*residual*) practices of sword and quarterstaff, along with practices that simultaneously carry both older (*residual*) and then-fashionable (*emergent*) statuses, such as stick fighting – which innovators such as Barton-Wright had recently made popular by hybridising them with jujutsu.

AFTER 1904

Viewed from our current vantage point, it is crystal clear that the then-emergent force to be reckoned with at the dawn of the twentieth century was first jujutsu and then judo. This emergence onto the Western European scene immediately began to enrich and transform the discourse of ‘self-defence’. 1904 saw Yae Kichi Yabe’s *Course of Instruction in Jiu-Jitsu, the Japanese system of physical training and Self-Defence*, and Skinner Kuwashima’s *Jiu-Jitsu: a comprehensive and copiously illustrated treatise on the wonderful Japanese method of attack and self-defence ... Poses by B. H. Kuwashima*. In 1905, Edward Drayton published *Ju Jitsu, the Japanese physical training and Self-Defence*. By this time, the floodgates were well and truly open.

To be clear, this is not to suggest that publications connecting boxing and wrestling with self-defence simply ceased. For instance, 1906 saw texts including *Spalding’s Boxing Guide: an accurate instructor of the science of self defence. Rules of boxing*, by Albert Goodwill Spalding [Spalding 1906]. Nor were all books that engaged with jujutsu and subsequently other (first Japanese, then Korean, then Chinese) arts wholehearted endorsements or celebrations of these new imports. Some authors attempted to reconcile the new Japanese approaches and techniques with older European styles of fighting. Thus, 1906 also saw the first of what would go on to see very many editions and republications of Percy Longhurst’s *Jiu-Jitsu and other methods of Self-Defence ... Profusely illustrated*, along with *Jiu Jitsu: the effective Japanese mode of self defence. Illustrated by snapshots, etc.* In such works, Longhurst carries out evaluations of jujutsu in comparison with other fighting styles, and although he does not renounce Western approaches, he is very clear that there is much for the wrestler or pugilist to learn from them.

But the tide had definitively turned by 1904, and self-defence discourse throughout the twentieth century became increasingly subsumed into, hegemonised by, and translated into the terms of what ultimately became known as (Asian) martial arts. I have written at length elsewhere about the invention of ‘martial arts’ as a discursive entity in the late twentieth century. In the process I necessarily discussed in some detail the practices and ideas active throughout the twentieth century, beginning from around 1900. The first two thirds of the twentieth century

was the immediate prehistory of the birth of ‘martial arts’ as a discursive entity in Western popular culture [Bowman 2021]. Accordingly, I will not re-tread the same ground here. However, it seems pertinent to emphasise a point that may have been subordinated by my different focus in that earlier work. This is the following: that the late twentieth century appearance of East Asian (predominantly Japanese, Chinese and Korean) martial arts was not a ‘boom’ that emerged out of the blue. It was rather a very visible translation and spectacular reconfiguration of a long-established discourse reflecting deeply entrenched concerns: self-defence.

As I have sought to show elsewhere, ‘martial arts’ emerged *cinematically*, and Asian martial arts styles had such an immediate and captivating appeal and practical uptake because they were so visually spectacular and imaginatively seductive [Krug 2001; Bowman 2010]. But the space they occupied – the terrain they hegemonised – the discourse they reconfigured – was not previously uninhabited. It was largely (but not entirely)¹¹ that which in the European and North American context had been defined previously by and as self-defence discourse, since at least the birth of the seventeenth century.

‘Martial arts’ as we recognise and understand them today have, from the outset in the West, always been defined by reference to a much older and weightier term, and they are best understood as only one of the most recent iterations of a far longer discourse: namely, self-defence. As I note throughout *The Invention of Martial Arts*, one of the most regularly featured terms in the titles of martial arts books of the late twentieth and early twenty first century is ‘self-defence’. As such, it is clear that – in Britain, at least – the discourse of self-defence is far older, more entrenched, more foundational, and undoubtedly more enduring than that of the much more recently popular term, ‘martial arts’.

Doubtless, self-defence existed before my starting point of 1604, and it goes without saying that self-defence flourished – and will continue to flourish – way beyond 1904 (and 2004, 2024, and many more). Nonetheless, the dates that have demarcated this discussion define a clear three-hundred-year period during which self-defence discourse as we know it today was sown (in English law), emerged as disciplinary practices and skill-sets, matured into anthropotechnic ‘technologies of the self, available equally to what Sloterdijk would call the individual(ist) ‘accumulation of self’ (or what Pierre Bourdieu would call cultural capital) and/or ideological nationalism, *for the same reasons and by the same token*. This is doubtless because ‘defence of the self’ has from the outset always been heavily defined through reference to ‘house and home’, a relation which means that not only ‘self’ but also ‘defence’ and certainly our ‘castles’ and ‘safest refuges’ are both our permanent properties and yet irreducibly shifting referents, calling out for any number of different forms of ‘defence’.

11 The martial arts boom of the late 20th century was clearly not merely about self-defence. As many have argued in recent years, a kaleidoscope of desires, fantasies, and cultural functions can be seen in the popular practice of ‘Asian’ martial arts that exploded in the 1970s and 1980s.

CODA: LIMITATIONS

This work has not tried to paint a rich and textured picture of what English or British culture and society looked like at any point between 1604 and 1904. It has not attempted to give a 'thick description' (Clifford Geertz) or carry out a 'conjunctural analysis' (Stuart Hall) of moments or movements in time. Its method was, to use Bruce Lee's phrase, 'simple and direct': to study books that use the term 'self-defence' as an organising theme. In proceeding in this (semasiological) manner, the approach necessarily excludes a far older and wider history of works dealing with military, weapons, duelling, prize fighting and pugilism. It does so specifically in order to establish what 'self-defence' was taken to mean by authors dealing with interpersonal, physical, embodied aggression and defence. Thus, this work has proceeded by 'reading out' from an almost violently circumscribed selection of texts, rather than 'reading into' a more nuanced range of potentially relevant works, drawn from a broader pool. Hence, the status of the methodology selected is both double and ambivalent: on the one hand, it is entirely defensible (you have to draw a line *somewhere*); on the other hand, it is entirely indefensible (*this* boundary excludes and remains blind to so much). As such, this work is both a contribution to our knowledge of self-defence history, and also an invitation to further development. This work necessarily excluded a great deal. The question now is one of establishing the ways that including more of this overlooked material might change – enrich or transform – our understanding of the development of self-defence as a discursive entity in this context and others.

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'WE DO BAD THINGS TO BAD PEOPLE': KRAV MAGA'S GERMAN CAREER IN THE LIGHT OF SOCIAL SYSTEMS THEORY

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ABSTRACT

Despite its worldwide popularity, Israel-originated Krav Maga is still remarkably unexplored. With regards to Krav Maga's global spread, this article focuses on the 'social career' of Krav Maga in Germany and enquires into the conditions for its success. Beginning in the 2000s, Krav Maga has rapidly resonated throughout Germany, nowadays showing a high degree of social connectivity and differentiation. Analysed through the lenses of social systems theory, Krav Maga's increasing popularity in Germany can to a significant degree be ascribed to communication – implemented in particular by highlighting relevant differences from other practices and systems of self-defence, and by its new correspondences with contemporary social and individual needs and expectations. As our analysis shows, Krav Maga, as an effective solution to the pressing problem of interpersonal violence, provides an answer to a problem that is at least partly contributed to by the system itself. Following initial analyses of the spread of Wing Chun in Germany, this case study makes a further contribution to an understanding of the socio-cultural evolution of self-defence systems in Germany.

INTRODUCTION

Despite its worldwide popularity, the Israel-originated self-defence system Krav Maga is still remarkably unexplored. However, in recent years, Krav Maga has gained scientific attention from different disciplinary perspectives. For instance, practice-oriented studies have focused on general aspects of motor control on a neurophysiological level [Mor 2021] or examined medical and pedagogical issues of injury and injury prevention in civilian [Staller et al. 2017] and military [Farkash et al. 2017] Krav Maga training.

Cultural and political studies have investigated the actual role of Krav Maga in a globalized world, focusing on its particular reference to violence. In his recent study, Molle [Molle 2022] identified Krav Maga as a social 'vaccine' against violence within violent modern societies, and thus touches on the paradox of the self-application of violence to violence, which can only be resolved in perspective. For Krav Maga, it takes the use of a certain lens to provide a sense of solidarity on a group or nation's level based on violence. Also referring to violence, the ethnographic study of Cohen [Cohen 2010] sheds light on the transgressive power of Israeli Krav Maga training. In the so called 'tour and train' programme in Israel, especially designed for foreign tourists, the abstract political discourse on the global war on terror manifests itself on an individual, concretely physical level through exercises in self-defence. In the realm of somatic reasoning, tourists participating in the program become practically and ideologically part of the global 'war on terror'.

Finally, recent research on the history of Krav Maga has provided further valuable insights on the origin, invention, and global spread of the system. Originated in Israel and by no means the product of a sole inventor [Mor 2018; Schaflechner 2021], Krav Maga 'as a globally recognizable signifier for self-defence' [Schaflechner 2021: 110] has spread around the world, and is now being 'practiced in over 120 countries' [Mor 2018].

This article further elaborates on Krav Maga's global resonance using a single case study. The focus settles on the key question of how the quite remarkable spread of Krav Maga in Germany can be explained. Beginning in the 2000s, Krav Maga has spread rapidly throughout Germany, nowadays showing a high degree of social connectivity and differentiation. Analysed through the lens of social systems theory, Krav Maga's German career appears to be at least partly an effect of generalized streams of communication – in particular realized by highlighting relevant differences to existing practices and systems of self-defence, and by corresponding to contemporary social and individual needs and expectations.

Social systems theory is used here as a method to describe Krav Maga as a social system *based on and reproduced through communication*. According to systems theory, Krav Maga has no ontological basis beyond communication. Instead, it is based on iterative processes of communication of the same type, thereby establishing and perpetuating the system's state of existence.

Within its conceptual architecture, social systems theory [Luhmann 2008] offers the potential for a systematically guided analysis of Krav Maga's national career. From this perspective, Krav Maga's German success can be scrutinized as an effect of communication, making use of significant differences that articulate Krav Maga's specificity and distinguish it from other martial arts, thereby presenting the system as a rather unique solution to the contemporary forms of the problem of interpersonal violence. Following our initial systems theory analyses of the national spread of Wing Chun [Koerner et al. 2019], this case study makes a further contribution to a broader understanding of the sociocultural evolution of self-defence systems in Germany.

GERMAN DATA

In Germany, Krav Maga has gained a remarkable amount of public attention within the last 20 years [Or and Yanilov 2008; Madsen 2014; Draheim 2016; Wahle 2016; Draheim 2018]. According to interview data from one of the early pioneers of Krav Maga in Germany,¹ the very beginning of Krav Maga's public career in Germany started in the early 2000s:

Because the police and military units have always exchanged and communicated with each other [...], there were certainly already the first pioneers in the professional area, in the security sector, who trained somewhere or did something. But it remained limited to professional groups. And what there was, of course, and there is still today, are Israelis who have left their military units and see a future profession in it, to pass on their knowledge [...] That [situation] already existed in 2000, 2002. [...] And in 2002 there were already two people before me and [my colleagues], who had actually been in Israel two years before [...] In that sense they are for me the very first ones, actually. (Pioneer 1 2018)

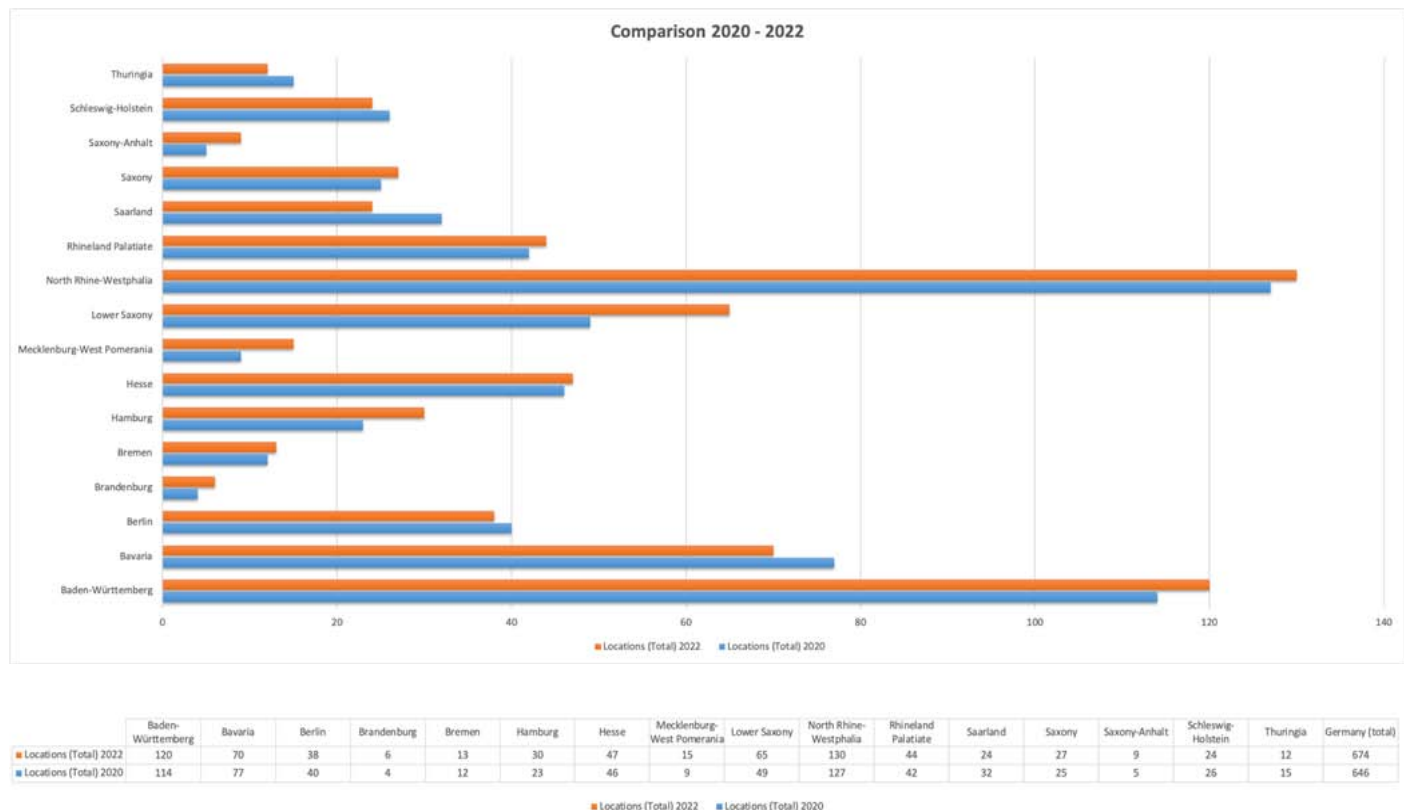
Since these beginnings, accompanied by the efforts of the early pioneers to maintain contact with Israel, Krav Maga spread rapidly around the country. A Google search for Krav Maga programs in Germany carried out in May 2022 revealed 674 national and international organizations as well as independent schools and derivatives (see Figure 1). Whilst

¹ On the question of the early development of Krav Maga in Germany, we had sent interview requests to early pioneers known to us personally and through literature. Among those persons, who were the first to introduce Krav Maga to a German audience, one pioneer (in the following: Pioneer 1) agreed to an interview. Informed consent was obtained before the interview. The semi-structured expert-interview [Bogner et al. 2014] lasted 53 minutes. It was conducted in German, audio-recorded and subsequently transcribed verbatim [Kuckartz 2014]. For the purpose of publication, quoted passages were translated to English.

the slight difference between 2020 and 2022 suggests that the overall growth seems to have levelled out recently, nonetheless the public resonance of Krav Maga in Germany since the 2000s remains remarkable. Amongst the sixteen German federal states, Baden-Württemberg

(south) and North Rhine-Westphalia (west) have the most Krav Maga organizations, while it is less present, generally speaking, in the east and north of Germany (see Figure 1).

Figure 1: Representation and distribution of Krav Maga organizations in Germany, comparison 2020–2022



Looking at the current top ten Krav Maga associations in Germany according to the number of locations, the data reveals that only three international Krav Maga organizations are represented (see Table 1). All others, including Germany’s leading number one and number two

organizations, are German businesses and trademarks. This ‘German drive’ suggests an interesting socio-evolutionary national development. In organizational terms, Krav Maga in Germany has become predominantly ‘German’ in only two decades.

Table 1: Top 10 German Krav Maga organizations (2022)

	Organisation	Number of Locations
1	Deutscher Krav Maga Verband (German Krav Maga Organization)	78
2	Krav Maga Defcon	68
3	Krav Maga Global (KMG)	66
4	Krav Maga Union	53
5	You can fight!	52
6	International Krav Maga Federation (IKMF)	34
7	German Krav Maga Federation	21
8	European Krav Maga Organization	20
9	Krav Maga RSC	18
10	Fighting System KM	15

According to results of our analysis which are presented below, Krav Maga success can be ascribed to having provided the promise of an answer to violence. The *Deutsche Krav Maga Verband*, one of the German representations of Krav Maga, encapsulates this promise in a nutshell – ironically, using the catchy English phrase: ‘We do bad things to bad people’.

SYSTEMS THEORY PERSPECTIVE

Adhering to Lewin’s *bon-mot* that ‘there is nothing as practical as a good theory’ [Lewin 1943] we analyse Krav Maga’s resonance in Germany through the lens of social systems theory, which, in its contemporary form, was mainly conceived by the German Sociologist Niklas Luhmann [Luhmann 2008]. The core idea is to take systems theory as a method for rigorous observation [Nassehi and Saake 2002] and apply it to the study of Krav Maga’s German career. This analytical approach has been successfully adapted to other martial arts in the past [for Wing Chun see Koerner et al. 2019]. Luhmann’s theory itself, which we use as a basis for our deliberations, starts from distinctions such as system/environment, and thereby produces its object of observation through the use of distinctions. Importantly, by disclosing its dependence on distinctions, in the context of systems theory, the procedure of observation becomes comprehensible as a methodological procedure.

By taking up a perspective based on systems theory, the perspective and systemic character of scientific observation is emphasized, making clear that everything that derives from here, derives through the specific use of specific theoretical lenses, using distinctions to ‘make the world speak’ [Koerner and Staller 2022]. Grasping another methodological approach, a different observational perspective and different distinction – e.g., analysing Krav Maga as a field of cultural production [Bourdieu 1983] – would lead to a different constitution of the subject matter and to different results [Nassehi and Saake 2002]. Generally speaking, what we see depends very much on which terms and categories we use within the process of ‘seeing’. In a constructivist manner, systems theory notes

that everything said and written is said and written by an observer [Maturana 1985].

The observation itself is based on distinctions. Within a systems theory approach, Krav Maga can be observed as a social *system* within the *environment* of other social systems, like the police, sports, economy, media, law [Luhmann 1986]. In this approach, the distinction between system and environment [‘system//environment’] is used. In the perspective of social systems theory, Krav Maga unfolds as a network of communicative acts, realized on two levels. On the level of practice, Krav Maga is *the communication* of moving bodies [Krabben et al. 2019], interacting with each other (training, sparring, fighting, etc.) in a mode analogous to ‘question and answer’. A 360° defence in Krav Maga training, for instance, can be seen as the answer to an outside slap to the head performed by another trainee, simulating a real-world attack. On a further level, Krav Maga is rooted in all *communications about* Krav Maga, e.g. as represented in textbooks, social media blogs or coach instructions. For Krav Maga as communication and communication about Krav Maga the distinction between fighting and talking (‘fighting//talking’) is put forward.

At this point it is worthwhile making some notes on how communication is seen within social systems theory. According to the seminal works of Luhmann [Luhmann 2008], communication can be defined as a threefold selection process, assuming the participation of an Alter (one system) and an Ego (another system or person). Basically, communication has always an information (component 1) and a distinct form (component 2) selected by an Alter, and someone (Ego), who decides to connect (component 3) – either with a punch, a block, a written or spoken word, or a gesture, etc. Communication is only put in place if someone (Ego) connects to what is said or done (by Alter). Each connection is in itself already a selection of information and form, which in turn build the reference point for further connections. Therefore, within social systems theory, communication consists of recursive selections [Luhmann 2008]. Along with this recursiveness, Krav Maga as a

social system based on communication emerges, and it can only emerge this way. In other words, through the observational instruments of systems theory, Krav Maga has no ontological basis – there is no root, no identity and no essence beyond communication. Observed as a social system, Krav Maga is the iterative process of selected communication, connecting to previous operations of the same type. Accordingly, the social career of Krav Maga is based on the continued selection of communication.

Furthermore, in line with social systems theory, a functional perspective on communication can be drawn [Luhmann 2008]. From this point of view, Krav Maga is to be analyzed as the solution for a given problem. This may be the most intuitive assumption system theory has to offer concerning Krav Maga: If violence occurs, Krav Maga is the solution. This aspect of problem solving is based on what we would call ‘the internal variety of differences’ that Krav Maga establishes in and through communication. For Krav Maga being functionally depicted as a problem-solver, the distinction between problem and solution (‘problem//solution’) is used.

Krav Maga’s status as a social system can be further elaborated through the three levels of self-reference that allow social systems to establish contact with themselves and reproduce themselves [Luhmann 2008]. First, the level of *operation*, signifying the key event of Krav Maga. Second, the level of observation and *reflection*, on which Krav Maga observes itself and provides answers on what Krav Maga ‘really’ is. This level of self-reference is analogue to what is called self-concept in psychology: the concept of oneself about oneself. The third level on which social systems organize to refer to themselves is the level of *reflexivity*, on which Krav Maga as a social system gathers options for higher-order self-control. Within social systems theory, the existence of a system is not taken for granted or somehow ontologically backed up in timeless essence. Instead, social systems are the product of time-consuming operations that have to continue in order to establish and perpetuate the system’s state

of existence. By identifying levels on which Krav Maga performs loops of self-reference, its social systems character can be shown. In this vein, Krav Maga’s three levels of self-reference on which the system produces itself as a social system will now be outlined in more detail.

KRAV MAGA’S THREE LEVELS OF SELF-REFERENCE

Systems-theoretically, on the first level the key process and basic event of Krav Maga has to be identified. We assume that in the light of common social representations of Krav Maga *self-defence* can plausibly be assumed to be the systems’ basic event. Krav Maga as social system is built around self-defence within the distinction ‘self-defence//non-self-defence’. In general, social systems use codes to distinguish between their own and external sense orientations and reject the latter against the background of internal preferences. In this way, codes create and stabilize the boundary between system and environment, reduce what is possible in the system to what is definite, and cover system operations with a non-arbitrary structure. By designating *self-defence* as its own preferred value and at the same time designating *non-self-defence* as a negative value, Krav Maga, as a social system based on communication, ensures that operations relate to operations of the same type – as if on an infinite chain. At both levels of communication, at the level of fighting bodies as well as at the level of talking about Krav Maga, the operations of the system refer to self-defence, reproduced from operations that refer to self-defence.

In addition, on this level of basic self-reference Krav Maga holds a flanking code, specifying and clearing up the very basic event. As one example among almost countless equivalents is Picture 1: a screenshot taken from one of the most popular Krav Maga videos² on YouTube worldwide (with 51 million views, as of June 2022). It points to the globally valid special feature of Krav Maga: its effectiveness. Krav Maga is not only self-defence as opposed to non-self-defence. It is *effective* self-defence as opposed on non-effective systems.



Picture 1: Krav Maga’s kick to the genitals, screenshot from ‘How to win every fight in three seconds’ (YouTube)

2 https://www.youtube.com/watch?v=qWJl0oO_4jQ

Krav Maga claims to be effective self-defence, thereby distinguishing itself from other presumably less-effective branches of related practices. By assigning to itself effectiveness as opposed to non-effectiveness within the binary code ‘effective/non-effective’, Krav Maga confers a special position within the landscape of contemporary self-defence systems to itself. It presents *effectiveness* as the very essence of Krav Maga – at least, that’s what the communication about it suggests. Or to put it in the words of Draheim, the author of two renowned Krav Maga books on the German market: ‘The unique feature of Krav Maga: effectivity by all means’ [Draheim 2018: 14]. In putting its code straight to this purpose, Krav Maga excludes itself from combat sports and martial arts. Krav Maga postures as the effective tool for survival in urban societies per se. As a German Krav Maga pioneer we interviewed puts it:

This strict focus on the needs of self-defence [...] did not exist [in Germany] at all in Ju-Jutsu and did not exist at that time in any martial art – where there was clearly this difference between sport or art, like Aikido or Tai Chi. I found it only in Krav Maga. (Pioneer 1, 2018)

With regards to the second level of systemic self-reference, social systems theory is geared towards Krav Maga’s *self-description* as a system. On this systemic level Krav Maga reflects about itself, using the distinction between system and environment and thereby (re) establishing it. The quotations and depictions taken from Krav Maga representatives so far belong to this level of self-reference. On the reflection channel of communication, Krav Maga is dealing with Krav Maga as a system different to the environment, in that sense, that ‘Krav Maga is not a traditional or competition-oriented martial art, but pure self-defence, and in this it is a fight for pure survival’ [Draheim 2016: 14]. Krav Maga is what it isn’t: not art, not sport, but pure self-defence.

Taken from its self-description, binary schemes such as pure//non-pure, mean//fair, effective//non-effective build the main arch of Krav Maga’s storytelling in the German context. Krav Maga is purely focused on self-defence whilst rejecting alternate purposes such as competition or health as prior orientations. Preferably, vital targets such as the groin are attacked (see Picture 1) and it strictly follows a ‘no rules’ policy [Draheim 2016]. According to this storyline, Krav Maga succeeds as the embodiment of effectiveness in the realm of modern self-defence. Krav Maga is badass [Katz and Katz 1989; Kopak and Sefiha 2014]. Importantly, it is not only Krav Maga’s German self-description that is structured by the binary schemes mentioned [Or and Yanilov 2008; Madsen 2014; Draheim 2016; Draheim 2018] but also the global level of reflection [Silva 2016; Karen 2017].

Thirdly and lastly, *reflexivity* creates the final level of Krav Maga’s systemic self-reference. Reflexivity in general consists of the application of a process on processes of the same type [Luhmann 2008; Koerner and Staller 2022]. As such, reflexive mechanisms provide features of higher-order systemic development, allowing for more self-control. Modern organizations, for instance, are continu-

ously facing the demands of a basically unknown future by using the concept of *learning of learning*. Learning of learning provides a general reflexive mechanism, allowing for a second-order learning and thus for organizational development independently of the respective contents. In science, observation of observation presents the key reflexive mechanism, allowing the system to control its main purpose of producing truth(s) – or at least evidence – as a basis for decision-making in several domains of modern society [Koerner and Staller 2022]. In politics, the application of power on power enables the controlled change of legitimate power.

Referring to the systemic key event of self-defence, reflexivity in Krav Maga could be determined as ‘defending self-defence’. The self-application of the key event is shown within Krav Maga’s internal procedures. First and foremost, all procedures related to the social closing and opening of the system can be understood as mechanisms of Krav Maga’s *second order self-defence*. For example, any individual’s access to training, workshops and camps is based on the organisation’s guidelines and regulations. The question of who may participate and under what conditions is by no means subject to arbitrariness. Access is strictly regulated, which protects and defends the system from unpleasant irritations and threats from outside, e.g., the ‘theft’ of important information.

Since Krav Maga – by the rule of a further reflexive mechanism – is only taught by certified trainers from within the system, access to trainer career and related education is provided with binding inclusion and exclusion criteria. These criteria ensure that only those who, from the system’s point of view, authentically represent the knowledge and skills of the system, enter the trainer level. Curricula are the place where Krav Maga’s key information is kept, generally not (or not entirely) accessible to external observers of the system. Curricula for practitioners and trainers ensure that only the content (problem situations, techniques, principles and methods of teaching) specified by the system is covered in training. Only through the mechanism of formal membership to a certain Krav Maga organization do participants gain access to this information as well as, in the capacity of trainers, the authority to show and explain them to a chosen audience. However, this does not apply everywhere and to every audience: As Draheim [Draheim 2016] states in his latest publication, referring to his first German book on Krav Maga from 2016: ‘At that time, I was not allowed to write about techniques because of the association membership, as my first book [dealing with methodical issues of training] was already regarded as a betrayal of secrets’ [14].

In this case, distributing knowledge without the system’s permission leads to the individual’s exclusion. By his own account, at the time of the publication of his second Krav Maga book, Draheim was already no longer a member of the organization but in turn CEO of a new autonomous authority ranking high within the top 10 German Krav Maga branches (see Table 1).

From the system’s point of view, opportunities for exclusion are a central component of its reflexive structures. For Krav Maga, reflexivity in the way of defending self-defence allows for higher-order routines of self-control within the system and thus makes an important contribution to its social continuation. In terms of reflexivity leading to the exclusion of members, the aforementioned ‘German drive’ provides an interesting case. The fact that nowadays most of the top 10 national Krav Maga organizations are genuine German branches and trademarks could theoretically be understood as a result of Krav Maga’s (not only including but also) excluding reflexivity.

The list of detached Krav Maga organizations indeed not only indicates an unintended failure of central control. Right from its very beginnings, Krav Maga in Germany was unable to show up as the one holistic organizational building in the same way as the Israeli Krav Maga Federation – which was founded 1978, and renamed in 1995 as the International Krav Maga Federation, or IKMF. For many years, in Krav Maga’s early stages, the IKMF served as Krav Maga’s primary authority.

However, on a higher level of systemic evolution, organizational differentiation itself creates a reflexive mechanism. Like in Matrushka puppets, the re-production of units of the same kind out of units of the same kind yields evolutionary nodes in the great chain of Krav Maga-related communication, marking the starting point for multiple differentiations in future. From this perspective, the dispersed set-up of Krav Maga organizations in Germany yields a central precondition for Krav Maga’s national spread. Differentiation is an undeniable sign for resonance and connectivity in communication within the social system of Krav Maga and therefore indicates successful socio-cultural development.

SOLUTION TO THE PROBLEM

From a functional perspective, Krav Maga can be observed as offering solutions for perceived problems of modern societies. On the level of its systemic self-reference Krav Maga reveals a huge variety of internal differences that allow for communicative connectivity within German society. By establishing itself as geared towards issues of *self-defence* (vs. non-self-defence), Krav Maga appears to offer a viable tool for dealing with social violence in times of heightened feelings of insecurity. Although German society is generally quite safe for most citizens, it is remarkable that some have noted an alleged increase in the sense of a threat of violence among the general public [Groß 2019].

In Germany, martial arts have long been popular practices. Currently there is a diverse landscape of styles and systems. Many of them, like karate, judo, boxing, wrestling, taekwondo, and kickboxing, focus on sport. Around 600,000 practitioners are registered in formally organized sports teams at the moment [DOSB 2020]. These martial arts often include subbranches offering self-defence solutions as an

additional option for their members (e.g., Taekwondo Self-Defence). Indeed, self-defence dimensions seem to be in high demand, even beyond national martial arts associations. For instance, Germany holds the largest enclave outside Hong Kong and mainland China for Wing Chun. Wing Chun has its origins in the Chinese province of Guangdong and focuses not only on art but also incorporates aspects of self-defence [Koerner et al. 2019]. Wing Chun was by far the most popular self-defence system in Germany during the 1980s and 1990s.

Into this martial arts landscape, Krav Maga entered German society in the 2000s. In contrast to the set-up of multi-purpose systems like judo or jujutsu (which offer a combination of art, sport and self-defence), Krav Maga had the clear agenda of *purely* focusing on *effective self-defence*, exemplified by a rigorous ‘no rules’ attitude. Krav Maga’s famous ‘kick in the nuts’, highlighted in literally every Krav Maga book on the German market [Draheim 2018; Madsen 2014; Sde or & Yanilov 2008; Wahle 2016], is emblematic of the whole system. Of course, when asking Krav Maga trainees about their motives for training, the core motive of learning how to defend oneself is often accompanied by discussion of health, fitness and socialising motives [Heil et al. 2016].

Nonetheless, Krav Maga seems to have benefited from the increased interest in self-defence in Germany, and has replaced Wing Chun in popularity. Its successful German career can be explained by the internal variety of differences it offers in providing both: it includes external adaptivity for ongoing social and individual demands for self-protection, and internal identity work that distinguishes the system from others. In sum, Krav Maga in fact provides solutions for some specifically contemporary German social needs and the internal demand for the continuation of internal operations. However, the system-theoretical understanding of Krav Maga’s German career is not finished at this point.

PROBLEMS WITH THIS SOLUTION

From a systems theory perspective, Krav Maga’s potential as a solution comes with problems. We elaborate this issue on two aspects: 1) the reduction of complexity and 2) the potential for radicalization.

1) Reduction of complexity

First, Krav Maga as a social system with the features described above is likely to reduce real-world complexity in three relevant dimensions:

- a) Within the social dimension, as exemplified in the German Krav Maga Group’s leading slogan ‘We do bad things to bad people’, Krav Maga presupposes a ‘we’ on the one side (the ‘good’ side) and ‘bad people’ on the other side. Whilst the slogan is simple and easy to grasp, scientific data reveal real-world conflicts are way more complex and ambiguous [Collins 2009; Levine et al. 2010; Sandlin et al. 2016; Nassauer

2018]. The lines between allegedly innocent persons who just defend themselves and perpetrators with bad intentions are anything but clear-cut. For Krav Maga training, which aims to develop learners’ conflict management competence in a realistic and responsible way, the social dynamics underlying most real-world conflicts (e.g., threat to one’s own convictions and self-determination; the feeling of being right; the need to assert one’s position, etc.) pose great challenges. A sound understanding of the dynamics that cause and prevent conflict and violence need to be practically addressed through good training design. However, in Krav Maga training practice, a simple role-play of ‘us’ as the good guys versus the bad guys out there blatantly violates the social complexity of conflict.

b) Within the content dimension, Krav Maga training suggests that it prefers ‘bad things’, generally referring to effective hard skills such as the ‘kick in the nuts’. However, just as conflicts in the real world cover a broad repertoire of interactions [Collins 2019], accompanied by internal conditions and expressive behavior (such as from fear to aggression, words to physicality, etc.), the corresponding Krav Maga training has to play on a continuum of de-escalating violent solutions, ranging from empathy, impulse control and active listening skills to physical self-defence. However, Krav Maga training with a sole focus on violent solutions falls short of the skills needed for competent real-world conflict management [Staller and Koerner 2020].

c) Within the time dimension, a micro and a macro level can be differentiated. On the micro level of Krav Maga training a linear handling of violence reduces real world complexity. Linearity is in place when exercises and instructions are oriented towards ‘if x happens, then do y’. However, scientific data reveal a nonlinearity of social dynamics [Collins 2009; Nassauer 2018]. Especially in terms of violent encounters, empirical data emphasizes the idea of overlapping actions that can rarely be attributed to cause and effect. On a macro-level, Krav Maga tends to overestimate the social occurrence of violence compared to the past. The truth for Germany is that physical violence is not generally increasing. In fact, in 2021 compared to 2008, violent offenses fell by about 6% nationwide [BKA 2009; BKA 2022]. Whilst threat and coercion have increased in comparison, simple and grievous bodily harm as well as murder and manslaughter have decreased. From a macro longitudinal and global perspective this is also the empirically backed argument of ‘The better angels of our nature’ [Pinker 2012]. In his seminal work, Steven Pinker argues, with reference to data, that our modern societies, although still violent, provide a much safer environments for human beings than in former times. Generally, there is less murder, rape and homicide than in past centuries. Interestingly, it is precisely on the level of reflection that Krav Maga creates the counter-narrative of an always dangerous world and thus narrates the problem for which it offers solutions. In communicative terms, then, Krav Maga responds to itself.

Table 2: *Krav Maga’s reduction of real-world complexity in the social, content and time dimension of violence*

	Krav Maga	Reality (From a science perspective)
Social dimension (alter // ego)	“We vs. bad people”	Complex interactions; blurred lines
Content dimension (this // that)	“Bad things”	Continuum
Time dimension (this // that) Micro Level Macro Level	Linearity of action // reaction Increasing violence	Overlapping; Nonlinearity “it depends”

Krav Maga’s reduction of real-world complexity regarding violence is not the only way in which the solution appears to be a problem.

2) Radicalization

Second, as a social system with bias towards violence, and with all due caution, Krav Maga’s relation to the potential of radicalization should be acknowledged. That radicalization and Krav Maga may at some point join forces has already been shown in our recent study on the ‘Pedagogy of Terrorism’ [Koerner and Staller 2018]. Using the example of the *Muhajid Guide* for Islamic terrorists we have shown that Krav Maga appears as a functional solution for violent purposes even for an ideological antagonist. As stated in the Guide:

If you want to know how to fight and defend yourself, the best fighting style to learn is Krav Maga. This Israeli fighting style is really good because it not only teaches how to defend and counter-attack quickly, but also teaches you how to disarm an enemy who might have a knife or gun. [ISIS 2015: 20]

The relation between Krav Maga and processes of radicalization can be pursued further in terms of the results of a recent study of Bouko et al. [Bouko et al. 2021]. In their discourse analysis of 3,000 Salafist and 500 right-wing extremist posts on Facebook the following patterns have been identified as elements of radicalization:

- skilful storytelling to intensify conflict
- creation of a collective identity surrounding it
- In-group/out-group mentality: ‘us against them’
- Promotion of violent solutions
- Status upgrade through risky behaviour, e.g. using violence [Bouko et al. 2021]

Taking these elements, the potential parallels between processes of radicalization and the observation of Krav Maga as a social system, as introduced in this article, become apparent. Especially through the lenses of Krav Maga’s three levels of systemic self-reference we argue that the system is structurally inclined towards the potential of radicalization.

On the basic level of self-reference, self-defence places conflict at the core of Krav Maga’s communication. Stories that introduce technical or tactical concepts revolve around conflict, since otherwise there would be nothing to defend. Conflict is the prerequisite of Krav Maga’s communication. As described above, the conflict itself is depicted in a complexity-reduced way, concerning the second level of self-reference: ‘the good’ (we) vs. ‘the bad’ (others), as well as clear-cut action–response schemes that allow for the clear attribution of ‘good’ and ‘bad’ behaviour.

The third level of self-reference, reflexivity, defends the Krav Maga art of self-defence from influences that favour a more complex representation of conflict and conflict management solutions. In that respect, the use of effective violence as *the* means of resolving conflict is rewarded with status. Likewise, bruises and injuries due to engagement in hard

training exercises (such as full-contact training) are also rewarded with status within the community: the competent use of violence and experiences with violence (and suffering pain and injuries) are stepping-stones towards the reputation of a ‘badass’ Krav Maga practitioner, even though such behavior could be viewed as risky from a training perspective as well as from a conflict management perspective.

The slogan ‘we do bad things to bad people’ condenses the system’s structurally-paved path to radicalization as described by [Bouko et al. 2021]: a complexity-reduced representation of conflict (good vs bad), that creates a collective identity in distinction from the others (the bad), and fosters violent solutions (bad things). As a slogan created by the system itself, it shows that the system preserves and defends its capacity for radicalization.

CONCLUSION

We have asked how Krav Maga appears under the lens of social systems theory. This lens approaches Krav Maga as a social system or a form of communication. It’s successful career in turn is based on the recursiveness of communicative acts. Krav Maga’s German (and presumably therefore its wider international) success is made possible by an internal variety of differences, allowing for continuous internal reproduction and external resonance, revolving around interpersonal conflict in an allegedly conflictual society. *Within these social environments, Krav Maga’s key code that determines its basic operation is effective self-defence, accompanied by the self-description of being pure and using any means necessary to avoid the danger of being victimized through violent encounters.* Geared towards the German situation, Krav Maga co-creates the problem it presents itself as solving. In contrast to the factual prevalence of violence that has to be considered in a differentiated manner, Krav Maga sketches the image of an omnipresent threat of violence on the level of self-reference, for which it then provides effective solutions. The system’s solutions thus respond to at least partially self-generated problems. Yet, in a perspective informed by systems theory, this narrative brings serious problems, which are worth acknowledging.

As we have shown, two aspects among many may be of key interest and need further investigation: Based on binary distinctions, Krav Maga’s narrative is likely to reduce the complexity of real-world violence, oversimplifying the (by far not merely physical) character and (rarely one-sided) dynamics of social conflicts and exaggerating their empirical occurrence, at least for Germany. Moreover, some of Krav Maga’s structural features such as the predominant narrative of a ‘dangerous world’, filled with the notion of more and more ‘bad people’ for which the system provides functional violent solutions, indicate at least similarities to known factors of radicalization.

However, these and other issues call for future research. The same applies to Krav Maga’s global career. How did Krav Maga develop in other countries and continents? Is Krav Maga’s career and communication

comparable or different to the German situation? What about France, the United States or South-Korea? Does Krav Maga seem to be prone to the same sorts of dangers in other markets? Are other 'self-defence' arts in Germany or elsewhere equally prone to radicalization? Are there any counter-movements within the Krav Maga system, advocating a different approach to modern self-defence? What other effects does Krav Maga have on a social and individual level. For future martial arts studies, social systems theory provides a useful analytical tool for the investigation of these and further issues.

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REVIEW ARTICLE

An Overview of Contemporary Scientific Research into the Physiological and Cognitive Benefits of Judo Practice

REVIEWER

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ABSTRACT

Jigoro Kano posited that self-improvement could be achieved through judo practice in three distinct ways: improved skill, higher intellect, and moral development; all of which may lead to more productive citizenry. While moral development may be important in martial arts practice, this article provides an overview of the current scientific research into skill acquisition and cognitive benefits of judo practice as hypothesised by Jigoro Kano. Through reviewing selected literature there is evidence to suggest that judo, and other similar martial arts, can improve skill development and cognition through practice. The aim of this review article is to illumine Kano's claims regarding judo as a beneficial practice that leads to an improved self which may enlighten current and prospective practitioners.

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Executive functions, self-improvement, personal development, embodiment, martial arts, judo

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INTRODUCTION

In the late nineteenth century, Japanese jujutsuan Jigoro Kano developed the martial art of judo which showcased a much less brutal practice than earlier samurai disciplines such as the *taijutsu* and *yawara* schools of Japan [Kano 1915/2005: 18]. Japanese society was developing under Western influence and the archaic practices of the samurai were beginning to fade into the shadows of the social periphery [Ebell 2016: 34]. Being an educator, Kano used his influence to invite students to participate in the dojo (training hall) practicing judo as a complementary educational tool that would assist in accomplishing other tasks outside the dojo [Kano 1915/2005: 34]. Pedagogically speaking, Kano's fusion of martial arts practice with education was rather revolutionary; that is to say, the way that he incorporated the body into education is now recognised by many scholars as *embodied knowledge*. For instance, Perry and Medina [2011: 62] describe this approach as a learning environment that affords students the opportunity to consider bodily senses through practice. Relating this concept to the dojo would mean that the practitioner enters the dojo to inquire into the subjective experience at a pace that is self-directed and in a way that encourages learning and builds upon previous experiences. Gunduz and Hursen [2015] argue that methods such as these encourage a dynamic learning environment, allowing the exploration into an experience that may generate new ideas in a discipline. Linking this learning environment back to Kano illustrates how Kano believed that judo would enable practitioners to capitalise on the lived experience, develop character, and become active citizens [Kowalczyk et al. 2022]. Unfortunately, despite the growing interest in judo, Kano never produced data that substantiated his assertions, for his main objective was to reintroduce martial arts into society with positive associations to education and personal development.

Since judo's rise to prominence in the Olympic games in 1964, research into the practice, along with other martial arts, has become of interest to scholars, particularly through sociology and psychology which are revealing that martial arts do positively influence human flourishing [Croom 2014]. As noted in Ryan and Deci's [2001: 141-142] research, the pursuit of martial arts studies is now an intense discovery into experiences that lead to optimal living and psychological health. Nevertheless, martial arts may also present practitioners with an alternative creative expression that leads to improved psychosomatics [Moore et al. 2018: 6]. These were the inclinations of Kano, and scientific research is now revealing how the sentient being experiences a pedagogical interspersed of 'gut feeling to the intellect' [Bowman 2018: 20], reified through the simultaneity of autopoietic enactivism and internal psychological representations [Haosheng, Jiajia & Dequan 2021: 1394]. When thinking about martial arts more broadly, this means that the art, as experienced and observed by practitioners, is a chief cornerstone in the production of phenomena, which is interconnected to being through creative exploration [Peterson 1999: 62].

While it is not the goal of this article to attempt to fill the gap between cognition and human experience, I am pushed to recognise that cognitive structures and the different pathways for embodied cognition are rooted in human creativity [Finke, Ward & Smith 1992: 2]. And to this, I believe it is necessary to provide a synopsis of these processes for how they relate to scientific evidence that judo practice positively contributes to a better self.

CONTEMPORARY SCIENTIFIC STUDIES INTO THE BENEFITS OF JUDO PRACTICE

Recent neurological studies suggest that judo is an effective physical activity for the development of executive functions, and researchers consider the practice a legitimate method for self-improvement [Amaral & Gabriel 2021]. A study conducted by Valdés-Badilla et al. [2021] of older participants in martial arts (mean age: 69.6 years) reviewed the disciplines of Olympic combat sports (i.e., boxing, fencing, judo, karate, taekwondo, and wrestling), as well as Brazilian jiu jitsu, measuring physical functionality and psychoemotional health. The findings from this study indicate that regular practice of martial arts improves balance, cognitive function, and mental health. To further understand this, Agrawal and Borkar [2021: 155] explain that martial arts demand high levels of cortical recruitment combined with complex repetitive actions that increases alertness and selective attention. In their study, Agrawal and Borkar observed a broader demographic that captured data from 969 martial arts participants aged between 18-40 years. Their systematic review examined the effects of martial arts on attention time span focussing on adults diagnosed with attention deficit hyperactive disorder (ADHD). Results from the study claim that most participants displayed improved coordinated activation and rates of attention, and control over behaviour. In addition to this, Agrawal and Borkar [2021: 152] demonstrated that '[The] positive expectation in terms of sports performance leads to a high level of self-efficacy and that overcome[s] psychological obstacles'. This is essential for two reasons: 1) self-efficacy plays an important role in a person's ability to use discernment, set and achieve goals, assemble ideas, and control emotion [Wilde & Hsu 2019]; and 2) it is important that we understand what helps us to exercise influence over what we do [Wilde & Hsu 2019]. This is best summarised by renowned psychologist Albert Bandura when he said: 'Perceived self-efficacy refers to beliefs in one's capabilities to organise and execute the courses of action required to produce given attainments' [1997: 3].

According to Lambourne and Tomporowski, improvements with executive functions are attributed to steady-state training (a period of continuous exercise), but studies in kinesiology reveal that cognitive task performance can be impaired during acute physical fatigue [2010: 17]. Lethargy may initially impede the cortical recruitment during high intensity exercise, but that appears to be short-term. Overall, Lambourne and Tomporowski [2010: 17] reveal that regardless of the type of physical exercise engaged, participants' executive functions

improved when tested post-exercise. Interestingly, a study on visually impaired judoka, conducted by Almansba et al. [2012], reveals that judo practice improved proprioceptive function (a sense of self-movement) for balance and was thus recommended as a valuable exercise for the development of balance and coordination for the visually impaired [Almansba et al. 2012: 157]. Interestingly, a similar study on the closely related art of Brazilian jiu jitsu (BJJ) examined the effects of BJJ on older participants, revealing that sixty-two male volunteers, non-institutionalised and aged between 60 and 80 years old, were assessed over twelve weeks engaging in BJJ training [de Queiroz et al. 2016]. The treatment intervention consisted of applying BJJ training twice a week. Each 90-minute session was divided into the following stages: (a) 5 minutes of initial stretching, 20 minutes of warm-up with active stretching, and strength exercises; (b) 3 minutes of recovery and rehydration (water only); (c) 50 minutes of BJJ training that included unbalancing (e.g., takedowns and throws), submissions, positions adequate for the skill level of the participants (beginners), and self-defense techniques; and (d) 10 minutes of stretching for cooldown and relaxation [2016: 4]. de Queiroz et al. reported that:

[I]n addition to strength, BJJ was also efficient in promoting an increase in flexibility levels, aerobic endurance, and motor agility/dynamic balance. During BJJ practice, many moves require the use of isometric contraction of lower and upper body muscles, which may lead to neural and somatic adaptations, such as increased motor-units recruitment and muscle hypertrophy. This could explain the increase in strength after intervention in the present study. [2016: 5]

Another study conducted by Belo et al. [2021] aimed at exploring the potential therapeutic effects of BJJ training by assessing blood pressure responses during and after technical sparring. The study consisted of seven BJJ practitioners (age: 24.0±3.5 years; height: 1.75±0.02 m; body mass: 76.0±4.2 kg; BMI: 24.5 0.9) who were required to perform three five-minute technical sparring rounds each day over a two-day period. The study confirmed that technical BJJ sparring induces significant post-exercise decreases in blood pressure which suggests that BJJ can be recommended as a non-pharmacological treatment strategy for the prevention and management of hypertension [Belo et al. 2021: 42]. A much broader study conducted by Johnstone and Marí-Beffa [2018], examining the neurological, physiological, and psychological effects of martial arts training, indicates that martial arts practice creates an excitability of the corticospinal motor system which improves alertness and overall executive functions.

The literature thereby demonstrates that physical activity significantly improves executive functions with both judo and BJJ proving particularly effective. This provides substantial evidence supporting Kano's assumptions that his reformed jujutsu practice would assist practitioners in improving their skill acquisition, intellect, and active, healthy participation in society.

THE IMPORTANCE OF DRILLS AND SPARRING WHEN PRACTICING JUDO

The aim of this section is to illumine Kano's hunches that judo advances self-improvement through an overview of scientific benefits associated with practice variability. I will present this by drawing a distinction between what is referred to as *kata* (sequenced patterns), and *randori* (random practice) [Dodd and Brown 2016] and how they are associated with what is deemed block practice and variable practice theory. I do this to describe how Kano's judo pedagogy, which included repeated practice combined with randomised application, remains relevant in contemporary practice.

Author, Taekwondo master and BJJ practitioner Josh Peacock [2019] has researched the successful application of this breakdown through what is called Variable Practice Theory (VPT). VPT suggests that once a technique is acquired, skill acquisition stands a greater chance of being understood through improvised sparring [Peacock 2019]. In a general sense, this is universally practiced in most judo and BJJ dojos. To demonstrate how this works, the first half of a lesson generally introduces techniques and concepts practiced under compliance with a partner. This is otherwise referred to as 'blocked practice' [Peacock 2019]. These techniques are samples or parts of a combative sequence, isolated from free exchange. The second half of the lesson may actively seek to use those techniques in free sparring which is improvised without compliance. This type of randomised and unscripted practiced is referred to as 'practice variability' which is common to *randori* [Peacock 2019]. A significant number of studies exploring embodied cognition demonstrate that perception and action are interdependent in relation to 'action possibilities', particularly if variability of practice encourages creative sequences in routines and subroutines of skill acquisition [Maldonato 2019: 695]. This means that higher-level decision making for skilled practitioners inducing repetitions of error correction hold a greater probability of skilfully resolving anticipated situations. This is referred to as improvisational execution, not to be confused with an impulsive unfamiliarity, rather, the effective goal-directed behavioural responses to predicted or unforeseen circumstances [Maldonato 2019: 695].

Practice variability provides a deeper conceptual understanding of *kata* and *randori* in terms of the linear and nonlinear processing of information. The blocked approach is more linear, focussing on information processing to encourage action-based sensory feedback, or in other words, sensory inputs that are measured against desired movement outcomes [Crotti et al. 2021]. *Kata* is an example of blocked practice because it requires drilling techniques and engaging the working memory (short term). For example, balance breaking, fitting into position, gripping, and timing of execution train the response inhibitions that suppress actions that are inappropriate in each context and that interfere with goal-driven behaviour [Xu et al. 2020: 2]. *Randori*, on the other hand, is the free exchange of variable practice, which engages

practitioners with a nonlinear approach favouring exploratory learning and the promotion of individualised movement solutions [Crotti et al. 2021]. To complement this transition from linear to nonlinear training, practitioners must also exercise emotional control (or emotional regulation). In other words, poise or restraint would be required for practitioners when under pressure and in compromising positions, allowing them to remain calm and execute techniques with precision [Côté, Gyurak & Levenson 2010]. This is important for following instructions, responding to questions, and comprehending concepts [Chai, Abd Hamid & Abdullah 2018] which Kano believed were all necessary developmental attributes of a mature active citizen.

CONCLUSION

Over the past century, judo theory and practice has maintained the position that practicing martial arts can be linked to improving mind and body and achieving more optimal living. As was mentioned, Kano had great aspirations for judo practice and intuited a theoretical proposition for self-improvement through such practice, although until recently, these claims were never fully proven. Through engaging the literature, such as Valdés-Badilla et al. [2021] on psychology and martial arts practice, as well as Johnstone and Mari-Beffa's [2018] examination into the neuroscientific effects through martial arts practice, there is evidence that confirms those casual links. I drew upon the literature to demonstrate that post-exercise studies for judo reveal improved executive functions, and that both practices are linked to an improved sense of self-improvement. To further investigate how the practice of judo may improve personal development, I drew upon literature that argues that martial arts can be used to positively influence emotions and self-efficacy [Agrawal and Borkar 2021]. The literature also illustrates how martial arts training combined with cognitive demands improves decision making and goal setting. This article contributes to the extant literature on martial arts by giving an overview of the current literature exploring embodied cognition which Kano implicitly stated could be achieved through judo practice.

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