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# RECOUNTING THE PAST

A Student Journal of Historical Studies at Illinois State University

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Number 4 (Spring 1998)

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## THE DYNAMICS OF POETRY IN JAPANESE SOCIETY

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Andrew Cole

The Heian Period was a time of great importance to Japanese culture. During this period, the Japanese developed their own writing system and their culture “was ready to develop along its own lines.”<sup>1</sup> Edwin Reischauer writes, “The golden age of the first flowering of Japanese prose was the late tenth and early eleventh centuries.”<sup>2</sup> It was during this “golden age” that Murasaki Shikibu wrote *Genji Monogatari* (*The Tale of Genji*) which became a lifestyle model for subsequent imperial courts. The Heian Period ended in 1185 with the rise of the military government (*Bakufu*) in Kamakura. It was during the Kamakura Period that Lady Nijo, a member of the imperial court, wrote her diary. By this time, the imperial court had lost its power but it was still the center of culture for Japan and the court was still imitating the descriptions given in *The Tale of Genji*.

During the following periods, the imperial court suffered decline with the rise of the *samurai* (warrior) class. When Tokugawa Ieyasu established his bakufu in Edo (the site of modern day Tokyo), he encouraged the samurai to become educated, not only in warfare but in literature as well. The Edo Period lasted for more than 250 years, and it was during the latter portion that Katsu Kokichi, a member of the samurai class, wrote his autobiography, *Musui doguken* (*Musui's Story*. He took the name Musui upon retirement). Over the

intervening 500 years, poetry and its usage had undergone great change. At the time Lady Nijo was writing, poetry was considered a sign of civilized life, but by the time Katsu was writing at the end of the Edo Period, it had become commonplace among the educated elite.

During its golden age and even during the age which followed, the imperial court was the center of culture and civilization for the Japanese. According to Earl Miner: “Long after the court had ceased to exercise political sway, its courtiers were envied, cajoled, and emulated for their priceless possession of the elements of civilization.”<sup>3</sup> The court was the only group, outside of religious orders that were filled with former courtiers, able to read and write and able to make and control literature, including poetry. According to Miner, the characteristic figure of Japanese literature is the diarist. He writes, “Japanese literature emphasizes human feeling. . . .” and “. . . faith in cultivated feelings.”<sup>4</sup>

Court poetry was constructed of thirty-one syllables in five lines (syllables per line being 5-7-5-7-7) called *tanka*. This form could also be used in poetry matches (*uta awase*) with the first section of seventeen syllables given (5-7-5), to be answered by the remaining fourteen syllables (7-7), which is known as linked verse. In terms of subject, court poetry “. . . does not concern itself with the humdrum, the coarse, the economic, or the sociological.” As poets, they were concerned with what they “considered to be fit subjects for poetry”<sup>5</sup> and sought “higher ideals . . . [of] courtly beauty (*miyabi*) or elegance (*fuuryuu*).”<sup>6</sup> The major themes

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<sup>1</sup> Edwin O. Reischauer, *Japan: The Story of a Nation* (3<sup>rd</sup> ed.; New York: Alfred A. Knopf, 1981), p. 30.

<sup>2</sup> *Ibid.*, p. 33.

<sup>3</sup> Earl Miner, *An Introduction to Japanese Court Poetry* (Stanford, CA: Stanford University Press, 1968), p. 4.

<sup>4</sup> *Ibid.*, p. 9.

<sup>5</sup> *Ibid.*, p. 3.

<sup>6</sup> *Ibid.*, p. 8.

were nature and courtly love. Nature, to the Japanese, represented what was “real, beautiful, and good”<sup>7</sup> and love was used to show, “the loneliness, the frustration, and the desolation of heart man knows in this world. The sorrow of love is the sorrow of life, the sorrow and the beauty of man’s relation to his fellows.”<sup>8</sup>

Even in the late thirteenth century, the imperial court was trying to preserve the ideal court life as described in *The Tale of Genji*, which by this time was nearly three hundred-years-old. A member of the court at this time was Lady Nijo. Lady Nijo, whom we know through her diary, *Towazugatari (The Confessions of Lady Nijo)*, was the pen-name of a concubine of the retired emperor, GoFukakusa. We also know she was of some importance by her being given the name *Nijo*, which translates to “Second Avenue” and was a common way of indicating position.

Nijo, through her writings, describes court life and its important aspects, including poetry. Poetry was a sign of culture and as such, held an important place in courtiers’ lives. Miner writes, “Poetry also circulated in manuscript, and in everyday life there was an astonishing degree of poetic allusion and recitation, at least if we can trust the evidence of diaries and tales. . . . Legends hold that men would risk their lives to win in poetry contests, or women their virtue to have a poem included in an imperial collection.”<sup>9</sup> For women, it was part of their limited education. According to Ivan Morris: “Calligraphy, music, and poetry—these were the main components of a woman’s education; and together they provided a good basis for the type of cultural life she was expected to

lead.”<sup>10</sup> It was part of the courting ritual, used by both the boy and the girl. The boy would send a poem showing his interest. The girl would promptly reply, also with a poem. This would be examined “with the greatest scrutiny; for its calligraphy and poetic skill” which were “a sure indication of a girl’s character and charm.”<sup>11</sup> Poetry and its usage held an important place in court life.

Nijo’s writing, which imitates *The Tale of Genji*, demonstrates this usage of poetry. Nijo uses poetry extensively throughout her writing and makes reference or allusion to many poems and pieces of literature. She writes of having seen “apparitions” later determined to be the spirit of retired emperor GoSaga which had temporarily left his body.<sup>12</sup> This is similar to the jealous spirit of Lady Rokujo leaving her body and killing Genji’s lovers in *The Tale of Genji*.<sup>13</sup> This usage is almost certainly a conscious imitation of *Genji* on Nijo’s part. Her entire story tells of situations where the court attempted to imitate sections of *Genji* and the characters constantly quote or make reference to *The Tale of Genji*.

Nijo describes for us the usage of poetry in courting and in demonstrating the courtly lifestyle. For example, there is the occasion of GoFukakusa’s affair with the fanmaker’s daughter. Having seen a fan Nijo had commissioned, GoFukakusa is attracted to the fanmaker’s daughter because of her beautiful painting, without ever having seen her. The liaison turns out to be a disaster, for while the girl is beautiful, she is not cultured. Upon hearing of the girl’s plight from Nijo, GoFukakusa, ever the

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<sup>7</sup> Ibid., p. 146.

<sup>8</sup> Ibid., p. 152.

<sup>9</sup> Ibid., p. 4.

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<sup>10</sup> Ivan Morris, *The World of the Shining Prince* (New York: Alfred A. Knopf, 1964), p. 209.

<sup>11</sup> Ibid., p. 214.

<sup>12</sup> *The Confessions of Lady Nijo*, trans. Karen Brazell (Stanford, CA: Stanford University Press, 1973), p. 15.

<sup>13</sup> Ibid., p. 273.

courtier, sends the girl the customary “morning after” letter which includes a poem. The girl replies with what Nijo describes as a “rather ordinary poem” and GoFukakusa has no more interest in her, other than to later inquire if the girl has become a nun (which she had). Had the poem been something special, GoFukakusa’s interest would have been piqued and he would have continued the relationship.<sup>14</sup>

Nijo shows the use of linked verse. Nijo was invited to attend a birthday celebration in honor of Lady Kitayama’s ninetieth birthday. While Nijo has been away from the palace due to GoFukakusa’s displeasure, she is close to Lady Kitayama and is persuaded to attend. During the festivities a party of courtiers go boating and while upon the water, compose linked verse.<sup>15</sup> This was a form of court entertainment and showed their refinement, compelling Nijo to include it in her autobiography. It is also of note that GoFukakusa used it as an opportunity to mention one of Nijo’s former lovers (GoFukakusa’s younger brother) and the sorrow she feels because he has died.<sup>16</sup>

Nijo’s writing shows that court life was imitated elsewhere in Japan. After leaving the palace, Nijo entered a holy order and became a nun. She traveled on pilgrimages throughout Japan and upon at least one occasion was in Kamakura, the seat of power for all of Japan. Here the people had power but sought to imitate the court life and style of the imperial capital in Kyoto. Nijo relates an episode where the wife of a powerful Kamakura lord received a gift of a five-layer kimono which was cut out but not sewn together. The ladies of this house had sewn it together without knowing how it was supposed to look, and the colors

had been put together in the wrong order. Nijo instructed the ladies how “to correct this amusing mistake.”<sup>17</sup> Nijo was amused at their lack of culture as well as at the way the kimono turned out. The court had the monopoly on style and culture, but the imitation of the court’s style and culture in other power centers foreshadows changes yet to come.

Nijo’s writing fits the pattern of literature of this time almost perfectly which should be of no surprise as almost all writers sought to imitate *The Tale of Genji*. A spirit of sadness or melancholy, of goals never reached, and lost glory permeates the literature while nature continues to be a poetic device and is included in some form in almost all poems. What is interesting is what Nijo chose to leave out. She made no mention of the Mongol invasion in 1274 and 1281 though she certainly knew of them. Was this because she did not consider it a fit subject for poetry and literature as Miner has suggested? Or, was it the case, as Reischauer has suggested that,

All that seemed to matter for these lady diarists and novelists was the sensitivity of the esthetic feelings and style in which the participants in the life conducted themselves, dressed, and wrote down their poems. The world of economic and political strife and its commonplace people did not seem to exist at all—and perhaps it really did not for these sheltered members of the high aristocracy.<sup>18</sup>

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<sup>14</sup> Ibid., pp. 83-87.

<sup>15</sup> Ibid., pp. 176-177.

<sup>16</sup> Ibid., p. 177.

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<sup>17</sup> Ibid., p. 194.

<sup>18</sup> Edwin O. Reischauer and Marius B. Jansen, *The Japanese Today* (3<sup>rd</sup> ed.; Cambridge, MA: Belknap Press of Harvard University Press, 1995), pp. 48-49.

For whatever reason, Nijo relates nothing about the politics of the times though she certainly knew what was happening and traveled among the highest circles.

Nijo's explaining to the women of Kamakura how to properly color-coordinate a kimono is symbolic of the spreading of culture to other power centers. Kyoto remained the imperial capital and center of culture, but Kamakura was the shogun's capital where the real power lay. As the power left the imperial capital, with it went educated, cultured men and women. They in turn gave education to new generations. Areas other than Kyoto and people other than courtiers gained access to education and the skills required for creating literature.

During the Kamakura and Ashikaga Periods, the land and government became more decentralized with *daimyo* (local lords) gaining power. As the country slipped into feudal anarchy, the daimyo rose to fill the power vacuum. This was a period of dynamic social changes which allowed minor lords or people of humble birth the chance to become powerful lords. Coupled with this decentralization was the formation of castle towns which sprang up around the castles of powerful lords, further decentralizing national political power but giving rise to new power centers. With the spread of power went a spread of learning, giving literacy to people outside of the imperial court and the *bakufu* (military government). Literature began to take on military themes. Donald Keene writes, "These tales contain many descriptions of military glory, . . . but what we remember most vividly are the scenes of loneliness and sorrow."<sup>19</sup> Melancholy was still the tone of poetry and literature but the subject matter has changed.

The latter half of the sixteenth century gave rise to a new dynamic, the

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<sup>19</sup> Donald Keene, ed., *Anthology of Japanese Literature* (New York: Grove Press, 1955), p. 25.

restoration of order in Japan. The impotent Ashikaga bakufu fell in 1573, bringing on *senjoku* (The Age of Civil Wars). These civil wars allowed Tokugawa Ieyasu, building on the foundation established by his predecessors Oda Nobunaga and Toyotomi Hideyoshi, to become shogun and reestablish what Peter Duus calls, "National Unity"<sup>20</sup> by establishing the Edo bakufu at Edo (now Tokyo) which "became the de facto capital."<sup>21</sup>

Having gained power, Tokugawa established measures to allow his family to keep power after his death. Building on a precedent established by Toyotomi, Tokugawa froze the social structure and developed a "four class division of samurai, peasants, artisans, and merchants."<sup>22</sup> A person's social class was determined by birth with no possibility of changing. Of these four, "the privileged class was the samurai, the governing class." The samurai had been servants and later warriors but now Tokugawa sought to identify the samurai with "the Confucian scholar—officials of China. Thus, he insisted that the samurai must not only be skilled in the military arts but be well educated, particularly in the Confucian classics."<sup>23</sup> Now, the highest social class joined the group of those with an education. Also becoming educated was the merchant class because they had the money in a city-based society, and they needed a certain amount of education to run business.

As peace was reestablished in the Edo Period following the years of civil war, new poetry began to emerge. The thirty-one syllable tanka was replaced by the seventeen syllable *Haiku*, which is the seventeen-

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<sup>20</sup> Peter Duus, *Feudalism in Japan* (New York: Alfred A. Knopf, 1969), p. 73.

<sup>21</sup> Mikiso Hane, *Premodern Japan* (Boulder, CO: Westview, 1991), p. 133.

<sup>22</sup> *Ibid.*, p. 142.

<sup>23</sup> *Ibid.*, p. 143.

syllable first half of linked poetry. Nature was retained as a poetic device but subject matter changed again and “Haiku is linked intimately with Zen Buddhism.”<sup>24</sup> Keene writes, “Humorous, or at least eccentric, verse began to be produced in large quantities, and a variety of frivolous tales also appeared.”<sup>25</sup> Keene also explains that “Heian literature had dealt mainly with the aristocracy. With the Kamakura Period the warrior class came to figure prominently in literature, but in the new literature of the Tokugawa [Edo] Period it was the merchant who was the most important.”<sup>26</sup> Poets such as Buson “brought to the haiku a romantic quality . . . .” Issa “lent to the haiku the genuine accents of the common people.”<sup>27</sup> Literature and poetry was beginning to spread to the common people.

At the end of the Edo Period, the social classes were still stratified but people could rise and fall within their class. The samurai class had three classes, *daimyo*, *hatamoto* (bannermen), and *gokenin* (housemen).<sup>28</sup> Of the classes below *daimyo*, bannermen had more privileges than housemen. One of the samurai of the bannermen class in the early part of the nineteenth century was Katsu Kokichi. In his biography, Katsu tells of being adopted into an important family (a common practice of the time), his life as an unemployed samurai, and how he “lived on the fringes of proper samurai society and made his way among the lower-class townsmen of Edo (now Tokyo). He was “a samurai who was neither a scholar or administrator . . . .”<sup>29</sup> and certainly was not of the model Tokugawa Ieyasu envisioned.

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<sup>24</sup> Ibid., p. 181.

<sup>25</sup> Keene, ed., *Anthology of Japanese Literature*, p. 27.

<sup>26</sup> Ibid., p. 28.

<sup>27</sup> Ibid., p. 29.

<sup>28</sup> Duus, *Feudalism in Japan*, p. 86.

<sup>29</sup> Kokichi Katsu, *Musui's Story*, trans. Teruko Craig (Tucson: University of Arizona Press, 1988), p. ix.

In his autobiography, Katsu never quotes a poem or even makes reference to poetry. He tells of learning to read and write, though at the age of twenty-one. As part of his samurai education, he would have certainly had to memorize famous poetry and classic Japanese stories, if only those of martial subjects. He knew swords by their type and maker and on several occasions describes the swords he and others are carrying. Why does he make no reference to poetry or literature in general?

Katsu probably did not see fit to mention poetry in his writings. It was no longer central to his life as it was to courtiers of the imperial court, and he did not express himself through veiled poetic nuances. Haiku was used as a way of seduction and was common in the pleasure quarters as was Katsu by his own account. The theme of the poetry in Katsu's life was of commonplace subjects, written for the common people. Literature was used for entertainment as exemplified by “*gesaku* fiction in which roguish heroes extricate themselves from one sticky situation after another.”<sup>30</sup> These are the Japanese version of the dime novel. The people had become educated and had taken poetry and made it their own, using it on their own terms.

By the end of the Edo Period, poetry belonged to the people and was used for their entertainment rather than as a vehicle to convey culture among the aristocracy. Poetry and literature spread through Japanese society with education. As education spread beyond the courtiers at Kyoto, they lost control of poetry and of civilized culture. Poetry, while still using nature as a subject and as a poetic device, began to reflect the outlook of the people. It provided entertainment and diversion to people who had other concerns. Rather than being locked in a stasis of convention, poetry became dynamic—changing with the

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<sup>30</sup> Ibid.

times. Poetry and literature moved from being an exclusive symbol and contrivance central to the lives of the aristocracy in Nijo's time to a medium of expression and entertainment of a more egalitarian nature in Katsu's time.



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**“GALLOPING INTO THE FUTURE”:  
THE MYTH OF EMILIANO ZAPATA  
IN MEXICAN LIFE**

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**Jacob M. Gourley**

Life in Mexico during the period of the Revolutionary War (1910-1920) was by no means easy. Political power shifted from leader to leader, yet little was done to address the concerns of the rural dwellers known as *campesinos*. Agrarian reform was more of a political buzz-word than a reality as new leaders adopted the patronage and land management systems of their predecessors. As a result, there was a pronounced tendency for militants to mobilize regional political and military support to usurp corrupt government systems.

The lives of such men, including Zapata, Carranza, and Villa, have come to represent the greater Revolution in the Mexican national consciousness. Specifically, Emiliano Zapata has been described as "the stuff that legends are made of . . ."<sup>1</sup> Mythical constructions abound in society, and the revered image of Zapata serves as a primary example. Contrasting Zapata's constructed image with the actual events of his life, however, provides a fascinating glimpse of how national myths are created as well as the functions they serve. Zapata the man and Zapata the ideal are in fact very different from one another. This essay strives to deconstruct the Zapata myth and to provide a greater understanding of how its presence has contributed to a

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<sup>1</sup> Samuel Brunk, *Emiliano Zapata: Revolution and Betrayal in Mexico* (Albuquerque: University of New Mexico Press, 1995), p. 1.

Mexican national consciousness that transcends the actual events of his life.

**What is Myth?**

Virtually all cultures ascribe to a number of myths or master narratives that are particularly useful to historians because of the latent meanings they engulf. Not only do myths serve the practical function of answering the unanswerable; they also act as the corpus of a people's beliefs about life and about themselves. Roland Barthes has asserted in literary circles that myth in the form of written language consists of two parts. First, there is the physical *mélange* of words on paper—the language itself. But when these individual elements are woven together artfully, they begin to take on a greater meaning, dependent wholly on the images, narratives, and social settings from which they are borne. This concept of the whole being "greater" than the sum of its parts is what Barthes would refer to as the "metalanguage" or Lyotard as the "master narrative."

As we look to the myth of Emiliano Zapata, we must be careful not to detach ourselves from mythical constructs as somehow distant, foreign, or "archaic." In fact, such constructions pervade all cultures and classes. The recent death of the Princess of Wales inspired many to retrieve the "Lady of the Lake" image from folk legend, particularly when the Spencer family announced Diana's body would be interred in a lake on the family estate. News broadcasts mentioned that upon the birth of Lady Diana's first son, William, many British subjects wanted her to name him "Arthur." It is a fundamentally held belief of many, even if relegated to drunken conversations and fairy tales, that King Arthur will return once again and lead his people to glory.

Americo Paredes writes in an article in *Western Folklore* that myths pervade

contemporary society not only as a testimony to the "vitality of folk belief" but as nearly tangible constructs. One example of these is based on the "repetition of certain historical circumstances, creating social or psychological conditions that lead to the resurgence of the 'Arthurian legend'."<sup>2</sup> He describes the outline of Arthurian legend as follows: "a defeated and subjected people dreaming of the restoration of their fortunes with the return of the dead hero, who is not really dead"<sup>3</sup> Such a belief has been applied to many "heroes" in the last half century, not limited to John F. Kennedy, Elvis Presley, Adolf Hitler (regretfully), and of course, Emiliano Zapata. Though the external circumstances in each of these cases are vastly different, the underlying "master narrative" remains very much intact.

### **The Myth of Revolution**

The Mexican Revolution is a critical part of the Mexican identity. It is a source of pride for many Mexicans and a fundamental element in the national consciousness. It inspired "countless ballads and stories which have become the modern Mexican folklore."<sup>4</sup> Defined from an external perspective, the Revolution refers to the political upheavals that occurred beginning with Francisco Madero's revolt in November, 1910, followed by nearly three decades of tumultuous insurrections and assassinations, and ending under the presidency of Lázaro Cárdenas from 1934-40. As the term "revolution" implies a complete transformation, many historians assert that the Mexican Revolution was not a revolution at all, but a struggle for power

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<sup>2</sup>Americo Paredes, "Yamashita, Zapata, and the Arthurian Legend," *Western Folklore*, 36 (1977), p. 160.

<sup>3</sup>Ibid., p. 161.

<sup>4</sup>Ilene V. O'Malley, *The Myth of Revolution: Hero Cults and the Institutionalization of the Mexican State 1920-1940* (New York: Greenwood Press, 1996), p. 1.

that had little direct impact on the life of the lower classes and rural *campesinos*.

Within Mexico, however, the Revolution has acquired a definition that reaches far beyond political upheavals and quests for power. In Mexico, "revolution" has been institutionalized both as a form of government and a way of life. Even today, national leaders strive to associate their actions within the conceptual framework of the Revolution as reflected in the name of the Institutional Revolutionary Party (PRI), which under various names has remained in power since 1929. The Mexican framework of revolution consists of many parts; a critical one of these is the image of Emiliano Zapata.

### **Who was Emiliano Zapata?**

Born in San Miguel Anencuilco, a small village of about 400 in Morelos, Emiliano Zapata led a life that has become a symbol of the revolution. The accomplishments of his movement are noteworthy. Under the famous battle cry "Land and Liberty!" he organized a revolutionary force to support Madero against Porfirio Díaz and the system of land distribution that had taken valuable property from Indian *campesinos* and placed it under the control of the wealthy landholders called *hacendados*. Once Madero had seized power, however, he did little to change the Porfirian system. Zapata, unwilling to settle for ineffectual reform, turned against Madero in 1911, and likewise against Huerta and Carranza in later stages of the Revolution.

Zapata's 1911 *Plan de Ayala* was perhaps his greatest accomplishment, because it gave a quasi-constitutional basis to the armed actions that elite culture had initially written-off as rural banditry. The Plan:

spelled out a program of land distribution, the conditions of indemnity, made provisions for assistance for widows and orphans of revolutionaries, and recognized the paramount right of the people to conduct their own affairs and to rule their own communities. In contrast to other land reform programs which obliged the peasants to prove their right to obtain land, the *Plan de Ayala* obliged the *hacendados* to prove their right to keep land.<sup>5</sup>

The Plan is assumed to have been written by Zapata's able assistant Gildardo Magaña, a recruit from Mexico City,<sup>6</sup> as Zapata himself was barely literate.

While revolutionaries in the North tended to be highly organized, Zapata had to work not only against the oppressors of his people, but as a unifying force among the various local chiefs and factions in Morelos. Always lacking supplies and armaments, Zapata pitched numerous battles and sieges to bolster his military inventory. In many cases, however, Zapata had little control over the actions of small bands of militants who used the agrarian movement as an excuse to loot and pillage. Fostering "revolutionary unity" was a tremendous challenge for Zapata; on many occasions, he sent men such as Magaña and Abraham Martínez to negotiate with northern rebel groups and, on occasion, diplomats from the United States.<sup>7</sup> Despite these difficulties, Zapata successfully led three peasant armies

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<sup>5</sup>Ibid., p. 43.

<sup>6</sup>Samuel Brunk, "Zapata and the City Boys: In Search of a Piece of the Revolution," *Hispanic American Historical Review*, 73 (1993), p. 40.

<sup>7</sup>Ibid., p. 47.

into Mexico City to demand governmental support of his Plan. After leaving the capital for the third time, he returned to Morelos and continued a small guerrilla war. Throughout his struggle, Zapata held firmly to the principles of the Plan, demanding that Mexico be "rebuilt economically from the bottom up."<sup>8</sup> After nearly two decades of struggle, Zapata met his end in April of 1919 when he was assassinated by federal troops in Chinameca, Morelos.

While living, Zapata often dominated the news. Representations of Zapata, particularly in Mexico City and in the North, were very critical. One magazine article wrote: "There have appeared in various caves . . . rebels, despotic, irreducible, sediments of agitation that are chemically precipitated from the lowest social depths . . ."<sup>9</sup> A telegram dispatched from the Charge d'Affaires to the U. S. Secretary of State dated August 3, 1911, writes off Zapata as a "petty revolutionary chief."<sup>10</sup> Later, U.S. government diplomatic documents of the same year describe Zapatista actions as "atrocities" and Zapata as a "ferocious bandit" who is the recipient of "indignation felt by all Honorable Mexicans."<sup>11</sup>

### **The Aftermath: Emergence of the Myth**

Not much time passed before the stories about Zapata began the transformation from politically-biased representations to mythical constructions. Government leaders, aware of the possibility of this trend, set Zapata's bloated body out for display. This was not "out of callous

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<sup>8</sup>John A. Britton, *Revolution and Ideology: Images of the Mexican Revolution in the United States* (Lexington: University Press of Kentucky, 1995), p. 47.

<sup>9</sup>O'Malley, *Myth of Revolution*, p. 42.

<sup>10</sup>Gene Z. Hanrahan, ed. *Documents on the Mexican Revolution*, Vol. 3, Part 1 (Salisbury: Documentary Publications, 1978), p. 9.

<sup>11</sup>Ibid., pp. 86, 89.

exhibitionism . . . but in an attempt to convince the locals that the hero was indeed dead. This did not prevent the creation of the legend that Zapata was still alive; the body displayed was said to be someone else."<sup>12</sup> Probably within hours of Zapata's death, this first incarnation of the myth began to circulate.

Two short years after Zapata's death, his image as a bandit and uncivilized chieftain had already begun to shift. One Mexico City newspaper wrote:

As time passes and the serenity of the spirits yesterday excited by the effervescence of political passions permits a serene analysis . . . of the past ten years, the personality of Emiliano Zapata acquires a stature that makes him stand above the vulgar mediocrity in which until recently [his detractors] sought to envelop him.<sup>13</sup>

Another editorial eulogized Zapata as a "defender of Democracy" who had fought for the "future greatness of the nation." His followers, described in years prior as "highwaymen" and "ragtag country bumpkins," were now described as "admirably organized *campesino* soldiers."<sup>14</sup>

By the mid-1920s it became clear that no person of political prominence would adopt the agrarian reforms championed by Zapata. It was during this period that his image began to shift from political to romantic hero. Four facets suggest themselves as pivotal elements in the Zapata image. These are: first, Zapata as a symbol of the enduring patriarchal ideal; second,

Zapata as a representative agent of class struggle; third, Zapata as the epitome of Christian goodness; and finally, Zapata as a romantic representation of *lo Mexicano*.

Zapata married Josefa Espejo just before his 32nd birthday. Womack asserts that this marriage was far different from its modern-day equivalent. "In rural Mexico marriage was not simply for siring offspring, or for love. Zapata already had at least one child (by another woman) and no doubt assumed—it was a common male assumption—he would have many more women he cared about."<sup>15</sup> Zapata's sexual exploits have hardly detracted from his image; rather, they have been used to build up his patriarchal position and "virility." A 1919 article in *Excelsior* told readers that "many mothers remember that their innocent daughters had been dragged from their homes and sacrificed at the alters of the sensuality of Emiliano."<sup>16</sup>

This image was heightened even further by an often told story of the boy Emiliano, finding his father in despair over the loss of the family's land to greedy *hacendados*, making the comment, "Father, when I am a man I will make them give back our land."<sup>17</sup> Zapata's placement into the role of "provider," both for his family and his people, is consistent with the patriarchal ideal. Baltasar Dromundo wrote that Zapata symbolized "the most ancient indigenous nobility in the fulfillment of family duty and in the romantic and sentimental aspects of his life as a man."<sup>18</sup> In fact, for many of the *campesinos*, Zapata was known simply as "el hombre"—the man.<sup>19</sup>

Second, Zapata has come to symbolize class struggle in Mexico. His low

<sup>12</sup>Paredes, "Arthurian Legend," pp. 161-62.

<sup>13</sup>O'Malley, *Myth of Revolution*, p. 45.

<sup>14</sup>Ibid.

<sup>15</sup>John Womack, *Zapata and the Mexican Revolution* (New York: Alfred A. Knopf, 1969), p. 107.

<sup>16</sup>O'Malley, *Myth of Revolution*, p. 43.

<sup>17</sup>Ibid., p. 61.

<sup>18</sup>Ibid., p. 62.

<sup>19</sup>Brunk, *Emiliano Zapata*, p. xi.

social position, used against him by elites during the time of Revolution, has become one of his greatest assets. "He was uncultured because when he was a child, culture was a privilege of opulent men of fortune or shameless bootlickers."<sup>20</sup> His simplicity and "common" ancestry have allowed those in similar social positions to claim him as their motivational leader from the time of his death to the present. A 1913 description of Zapata's goals rings with a tone familiar to the tales of Robin Hood. "The rebel leader of Morelos and his followers were bandits only in the sense that they sought a basic redistribution of property from the rich to the poor."<sup>21</sup> This "common man" virtue is a crucial element of the greater Zapata image.

Third, Zapata's moral characteristics have been uplifted, perhaps as a means to grant more legitimacy to his "heirs." Though accounts conflict in their descriptions of Zapata's respective degrees of attraction to alcohol, gambling, and women, it is obvious that on more than one occasion he indulged each of these pursuits. By 1933, however, newspaper accounts described him not as a drunkard, gambler, or womanizer. Instead, he was a "pure man, without stain," exhibiting "great character, great simplicity [and an] irreproachable private life."<sup>22</sup>

Finally, and perhaps most importantly, Zapata has come to symbolize the "truly Mexican" or *lo Mexicano*. In this role, Zapata has been championed as a prime example of indigenous Mexican culture and as an advocate for all things Mexican. A 1922 commemoration of his death exalted him as a man "oppressed by capitalism" who symbolized "the redemption of the rural proletariat." He had "felt his flesh bleed beneath the lash of the foreign overseer." Described as "frank,

simple, and very accessible to the poor the same as the rich" (here his myth begins to transcend class standing), Zapata was an "affable fellow" who "loved the bullfights, but in the style of the *ranchos*, without all the paraphernalia of the Spanish style."<sup>23</sup> In this crucial facet of the broader myth, Zapata is portrayed as a lover of things distinctly Mexican, and an objector to things foreign.

Another aspect of *lo Mexicano*, which could arguably be included in the patriarchal construct of the Zapata myth, consists of the romantic notion of the rural warrior, riding triumphantly through the hills as the "ideal Mexican man," the descendant of ancient noble blood. *El Democrata* wrote in 1925:

That youth who inspired love by disdain, who on his charger . . . crossed ridges and valleys like lightning, was of the brown race, of burnished bronze, of the profound, intelligent, melancholic gaze that is called Mexican! Of that race . . . destined to be great, if it enlightens itself and works to achieve its liberties. He who kissed and burned with his lips, was he who sought out danger and reveled in it; the restless and fiery one with the intelligent and melancholic gaze was Emiliano Zapata.<sup>24</sup>

This conscious reference to Zapata as an indigenous Mexican (despite his documented *mestizo* status) marks a focus on the internal versus the external factors in Mexican life and culture.

A final element of Zapata's role as *lo Mexicano* links him with the cultural

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<sup>20</sup>O'Malley, *Myth of Revolution*, p. 47.

<sup>21</sup>Brunk, *Emiliano Zapata*, p. 38.

<sup>22</sup>O'Malley, *Myth of Revolution*, p. 61.

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<sup>23</sup>*Ibid.*, p. 46.

<sup>24</sup>*Ibid.*, p. 53.

revolution that followed in the period shortly after his demise.

The decade of civil disorder from 1910 to 1920 aroused the Indian population and brought into the nation's cultural and political leadership a new generation that not only accepted the Indian as an important part of Mexican society and polity but also elevated the Indian past to a position of equality with, if not superiority to, the Spanish. Travelers who arrived in the early 1920s found excitement in this combination of ethnic awareness and cultural ferment that somehow united the dogged idealism of Zapata with the artistic creativity of Rivera.<sup>25</sup>

Once again, the fallen leader remains somehow alive and prominent in the nation's culture, transcending politics and entering the realms of ethnic art and ethnic pride.

### **Manipulation of the Myth: Latching on to National Pride**

In 1930, anthropologist Robert Redfield published a work in which he examined the indigenous Mexicans of Tepoztlán. Commenting on Emiliano Zapata, he wrote that "Zapata as a symbol embodies the group consciousness of the Indians of Morelos which developed during the Revolution."<sup>26</sup> Not surprisingly, this "group consciousness" failed to escape the awareness of the politically elite. Within a decade of Zapata's assassination, the anniversary of his death had become a

national celebration. This in itself reveals a triumph of the government, as Zapata's following was initially limited to Morelos and surrounding regions in the South. To extend his popularity, "propagandists had to dispel the notion that he was a monstrous barbarian."<sup>27</sup> Such an effort required his actions be "softened" at the edges and manipulated so that they would have mass appeal.

Political leaders invoked Zapata's name to both appease and exploit the *campesinos* of Morelos. When Obregón sought to overthrow Carranza, for example, he sought the support of the Zapatistas. Because of their proximity to Mexico City, they were a force that could not be ignored. Because they were viewed as the "most radical advocates of agrarian reform, their support lent further credibility to Obregón's reformist image and helped dissociate him from Carranza."<sup>28</sup>

In 1925, the municipal government of Mexico City formed an "Official Committee of Patriotic Commemoration, comprised of citizens' groups and municipal and federal committees which worked together to create ideological 'uniformity' in public ceremonies."<sup>29</sup> The outcome of this committee was the creation of the "official" history of Zapata's role in the Revolution and, in part, of the Revolution itself. In other words, the myth had been officially sanctioned in an effort to de-politicize Zapata's actual objectives. By co-opting Zapata's name and image, the same government that had essentially ordered Zapata's death wanted to invoke his name to prevent any future uprisings based on his beliefs

The 1994 Zapatista uprising, starting in Chiapas and culminating in a tremendous gathering in Mexico City, presents a

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<sup>25</sup>Britton, *Revolution and Ideology*, p. 58.

<sup>26</sup>Ibid., p. 114.

<sup>27</sup>O'Malley, *Myth of Revolution*, p. 47.

<sup>28</sup>Ibid., p. 44.

<sup>29</sup>Ibid., p. 15.

completely opposite example of the manipulation of the myth. Arguably, the Zapatista protectors had a much more valid claim to invoke Zapata's heritage in 1994 than did the Mexican government in the mid-1920s, but their use of his name was certainly not devoid of attempts to tap the power of "national consciousness." Their construction of Zapata differs from the Zapata that Womack describes as having made a revolution because his people refused to change. The "modern" Zapata was "forged in the collective need for change that has tensed and shaken Mexican society."<sup>30</sup> Still, elements of Zapata's original goal of "democracy, justice, and peace with dignity" remain the foundations of the movement.<sup>31</sup>

### **Conclusion: Is Emiliano Really Dead?**

It has been said that reality is nothing more than a temporal construct. For many Mexicans, the image of Emiliano Zapata, regardless of what national trend or cultural aspect is being exalted at the time, plays as profound a role in Mexican life as if he were still a powerful political force. And in the sense that millions of Mexicans hold dear the aims he fought for, he is. As a representative of patriarchal life, Zapata's virile, *machismo* image remains a part of *lo Mexicano*, from the sombrero-touting portraits on the walls of restaurants to continued male dominance in Mexican culture.

His symbolic representation of class struggle remains as potent as ever, as seen in the 1994 uprisings that invoked his name. Past indiscretions and sexual exploits are no longer a part of the public image of Emiliano Zapata. Still, however, these

behaviors have not been eradicated from the life of the Mexican lower classes. Yes, Emiliano is still alive in many ways. Understanding his image as a transcendent and fluid construction, however, allows us to see the Zapata myth as "more than representing a specific program." Instead, Zapata represents a "particular part of the Mexican experience."<sup>32</sup>

In truth, Zapata was hardly the flawless leader of impeccable character that has been embraced by the propagandists of the institutional revolution, nor the "Christ-like man-god of popular tradition."<sup>33</sup> Nevertheless, his image remains

deeply impressed upon the Mexican psyche. Even for those who do not still see his white horse roaming the mountains of Morelos, the myth of Zapata lives on. For the government this myth seems merely useful—a rubber stamp for whatever agrarian policy it chooses.<sup>34</sup>

Instead of representing the particular, Zapata has come to represent the broader Mexican experience. At a deeper, personal level, many Mexicans still see Emiliano Zapata riding through the hills. As demonstrated in 1994, though his image is constantly shaped and molded by temporal issues, when his people need him, Emiliano is there.

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<sup>32</sup>Brunk, *Emiliano Zapata*, p. 239.

<sup>33</sup>Ibid.

<sup>34</sup>Ibid.

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<sup>30</sup>Antonio Garcia de León, "Gallop into the Future," in Elaine Katzenberger, ed., *First World, Ha Ha Ha! The Zapatista Challenge* (San Francisco: City Lights, 1995), p. 212.

<sup>31</sup>Ibid., p. 216.

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## "ON HISTORY": THOMAS CARLYLE'S DEFENSE OF HISTORY

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**BRENT KINSER**

In 1829, Thomas Carlyle attained prominence after writing and publishing "Signs of the Times." Raymond Williams calls the essay Carlyle's "first main contribution to the social thought of his time." Carlyle, of course, would become one of the greatest social thinkers of his time. It is Carlyle, after all, who, as Williams relates, "named Industrialism for us, and gave it its first definition."<sup>1</sup> Carlyle's naming and defining Industrialism is not, however, the defining moment of his work. According to Samuel Chew and Richard Altick, Carlyle's "concern was to rescue society from materialism, greed, irresponsibility, uncontrolled competition, and industrial chaos." Thus one can argue that a motivating force behind Carlyle the thinker was Carlyle the reformer.

An essential aspect of both Carlyle's philosophy and vision of reform is his view of History. Chew and Altick write that "The value of history, in his [Carlyle's] estimate, lay in the lessons of the past which are applicable to the present; and he believed that a right interpretation of the contemporary situation would throw a beam of light into the darkness of the future."<sup>2</sup> Here one sees a unity between Carlyle the visionary thinker and Carlyle the social reformer. For Carlyle, the past was essential

to understanding the present and future. Thus, if History plays such an important role in Carlyle's work, and if one desires a more complete understanding of this Victorian sage, then it would seem helpful to explore further Carlyle's view of History.

Perhaps Carlyle's greatest work *about* History is an essay "On History" written for *Fraser's Magazine* in 1830, an essay which is especially important because it is an early expression of Carlyle's concept and vision of History.<sup>3</sup> "On History" is also important as a possible methodology for Carlyle's later histories, of which *The French Revolution* is, perhaps, the best example.<sup>4</sup> Furthermore, there is reason to argue that "On History" is more than an early expression of Carlyle's view of and approach to History. David Sorensen relates that because of the Utilitarian desire for "tangible and quantifiable elements . . . there were many reformers who regarded history as a useless form of knowledge that impeded clear thinking about the problems of society." Sorensen adds, "In *The French Revolution* Carlyle challenged the Utilitarian attempt to relegate history to a species of useless knowledge."<sup>5</sup> In other words, Carlyle is defending History against the Utilitarian position that History is "useless knowledge." If one can argue that *The French Revolution* is a product of the view of History expressed in "On History," then it seems only logical to approach Carlyle's vision of History—"On History"—as a defense of History. It is perhaps both interesting and obvious to make the connection between the nineteenth-century reformers who viewed History as "a useless form of knowledge"

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<sup>3</sup> Thomas Carlyle, "On History," in *Critical and Miscellaneous Essays* (Boston: Phillips, 1859).

<sup>4</sup> Thomas Carlyle, *The French Revolution* (London: Fraser, 1837).

<sup>5</sup> David Sorensen, "Postmodernism and the Disappearance of 'Environment': A Carlylean Perspective," *Carlyle Studies Annual* 17 (December, 1997), p. 105.

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<sup>1</sup> Raymond Williams, *Culture and Society: 1750-1950* (New York: Anchor, 1960), pp. 77, 84.

<sup>2</sup> Samuel C. Chew and Richard D. Altick, "The Nineteenth Century and After (1789-1939)," in Albert C. Baugh, ed. *A Literary History of England* (New York: Appleton, 1967), p. 1315.



and late twentieth-century post-modernists to whom, according to Sorensen, "history itself is regarded as just another fiction."<sup>6</sup> Postmodernists' relegation of History to the status of fiction is at least similar to the nineteenth-century claim that History is, if not a useless form of knowledge, then a greatly reduced form of knowledge. By making the connection between nineteenth- and twentieth-century opponents of History, it then becomes logical to approach "On History" as a prophetic defense of History.

One can connect *The French Revolution* and "On History" by analyzing the distinction Carlyle makes between the historian as artist and the historian as artisan. In "On History," Carlyle writes:

But the Artist in History may be distinguished from the Artisan in History; for here, as in all other provinces, there are Artists and Artisans; men who labour mechanically in a department, without eye for the Whole, not feeling that there is a Whole; and men who inform and ennoble the humblest department with an Idea of the Whole, and habitually know that only in the Whole is the Partial to be truly discerned.

For Carlyle, it takes an "Artist" to transform what data History provides into a coherent representation of a "Whole" event. An "Artisan," in a Carlylean sense, "will pass for a more or less instructive Gazetteer, but will no longer be called an Historian."<sup>7</sup> Thus, Carlyle distinguishes between the "Artist" who *sees* and the "Artisan" who merely *reports*. As part of his argument that

"no writer has ever evoked the past more vividly than Carlyle," John D. Rosenberg quotes A. J. P. Taylor: "*The French Revolution* is the only work [of all Carlyle's works] in which the past is not merely narrated, but recreated."<sup>8</sup> The opinions asserted by Rosenberg and Taylor seem to indicate that not only was Carlyle attempting to use methodology propounded in "On History," but that Carlyle had some measure of success in doing so. For Rosenberg and Taylor, Carlyle has recreated the French Revolution as an "Artist," not an "Artisan." Chew and Altick argue that, "As a work of art *The French Revolution* . . . stands alone among his [Carlyle's] historical writings. . . . [I]t has been superseded but has not been surpassed."<sup>9</sup> This is high praise that convinces one of the possible connection between the vision of History in "On History" and the applied historical vision in *The French Revolution*—what Carlyle says *about* History appears *in* his own histories. By agreeing to the consistency of Carlyle's historical vision, one can continue with the argument that "On History" (like Sorensen's reading of *The French Revolution*) is a Carlylean defense of History.

One way that Carlyle defends History in "On History" is by stressing the importance of History to humanity. Carlyle begins "On History" by invoking the ancient Greeks: "Clio [History] was figured by the ancients as the eldest daughter of Memory, and chief of the Muses; which dignity, . . . we shall still find to have been fitly bestowed." He goes on to place History "at the root of all science."<sup>10</sup> There is never any doubt of the high place within the human

<sup>6</sup> Ibid., 108.

<sup>7</sup> Carlyle, "On History," p. 222.

<sup>8</sup> John D. Rosenberg, "Carlyle and Historical Narration," *Carlyle Studies Annual* 10 (Spring, 1989), p. 20.

<sup>9</sup> Chew and Altick, "Nineteenth Century," pp. 1319-1320.

<sup>10</sup> Carlyle, "On History," p. 219.

search for knowledge Carlyle gives to History in "On History." From ancient times to Carlyle's present time, History holds an essential, if not *the* essential position. Carlyle continues, "In a certain sense all men are historians. . . . Our very speech is curiously historical. Most men, you may observe, speak only to narrate. . . . Thus, as we do nothing but enact History, we say little but recite it." Carlyle connects History to the quest for human knowledge on every level. History is pervasive throughout human thought and experience. The final point Carlyle makes on the importance of History essentially links knowledge and History: "For, strictly considered, what is all Knowledge too but recorded Experience, and a product of History." Carlyle's view of History is, obviously, a long way removed from the Utilitarian view that History is "a useless form of knowledge." On the contrary, Carlyle's view is that History is the basis of *all* knowledge, not useless knowledge. By arguing the essential importance of History, one can easily argue that Carlyle is, in fact, defending History.

Another way that Carlyle defends History in "On History" is by identifying problems historians confront in the conveyance of History. Carlyle's working definition of History is "Philosophy teaching by Experience." But Carlyle later concedes that "two difficulties, never wholly surmountable, lie in the way" of approaching History as "Philosophy teaching by Experience." The first problem that Carlyle addresses is the problem of "Experience." According to Carlyle, "History is the essence of innumerable Biographies." In other words, *History* is all of the separate, personal human narratives put together to form a whole *History*. Carlyle then writes that "if one Biography, nay, our own Biography . . . remains in so many points unintelligible to us, how much more must these million, the very facts of

which, to say nothing of the purport of them, we know not, and cannot know!" The sum total of human experience is simply too much for the historian to comprehend in its totality, unless that historian is, of course, God. Human historians find it impossible to process infinite human existence—History—into an accurate, comprehensible narrative.

In addition to the impossibility of grasping all of human experience, Carlyle discusses the difficulty in determining that which is truly historical. On this matter, Carlyle asks the question, "Which was the greater innovator, which was the more important personage in man's history, he who first led armies over the Alps . . . or the nameless boor who first hammered out for himself an iron spade?" Carlyle then offers a parable: "When the oak tree is felled the whole forest echoes with it; but a hundred acorns are planted silently by some unnoticed breeze."<sup>11</sup> The ideas in these passages certainly seem at odds with Carlyle's later, hero theory of History. In "On History," one sees a Carlyle wondering at the infinite, unknown vastness that is human experience. Although the great event is significant to History, it is the innumerable, mostly unknown events that make up the great majority of *actual* History. At this early stage of his career, Carlyle claims that "Marathons and Morgartens, are remembered by accident, not by desert." His early view of History is not a series of great people presiding over great events, but a series of "Phoenician mariners, of Italian masons and Saxon metallurgists, of philosophers, alchemists, prophets, and all the long forgotten train of artists and artisans." History made up of *all* events is so unfathomable and infinite in terms of the human experience involved that it leads Carlyle to concede, "Well may we say that of our History the more important

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<sup>11</sup> *Ibid.*, p. 220.

part is lost without recovery." The true and total subject matter of History is, for Carlyle, the daily sum total of individual, human narratives—narratives the great majority of which are lost to historians forever.

While recognizing the importance of narrative to History at the beginning of "On History," Carlyle also recognizes problems that are inherent to narratives of History. Carlyle uses the story of Sir Walter Raleigh to illustrate that narrative is inherently unreliable: "The old story of Sir Walter Raleigh's looking from his prison window, on some street tumult, which afterwards three witnesses reported in three different ways, himself differing from them all, is still a true lesson for us." That people see events (and give accounts of those events) differently is a simple fact of human observation and nature. For the historian, the basic unreliability of historical accounts stems from the realization that narratives are only as reliable as their sources. Carlyle goes on to concede that "even honest records, where the reporters were unbiassed by personal regard; a case which where nothing more were wanted, must ever be among the rarest." Not only are witnessed narratives unreliable because of different perceptions of events, they tend to lack complete honesty.

Another problem with narrative and the perception of events is the linear nature of narrative. Carlyle asserts, "The most gifted man can observe, still more can record, only the *series* of his own impressions: his observation . . . while the things done were often *simultaneous*." When a person sees events, that person necessarily must edit the event down to a linear narrative. Carlyle sees that people do not perceive events as wholes; people perceive events as narratives, and narratives are inherently unreliable. This problem is particularly troublesome to the historian

whose task is to transform narratives into a History. The historian, in trying to make sense of a "Whole" from the parts, must take several concurrent events and give them an artificial, linear, narrative order.

Thus, Carlyle ends his discussion of "Experience" within his definition of History as "Philosophy teaching by Experience." For Carlyle, History is the sum total of human events, observed by humans, transformed into narratives, and remembered by a mysterious process of historical consensus. The events of History enter the collective human memory because people witness events, remember events, and over time reduce History, "by a majority of votes," into a set of remembered events. Carlyle calls the vast body of human narratives "an ever-living, ever-working Chaos of Being, wherein shape after shape bodies itself forth from innumerable elements." Thus, in order to record human History, the historian must make sense of an infinite "Chaos" of events and narratives. Then, the historian himself must process Carlyle's "Chaos of Being" into a linear narrative in order to transform the infinite into a neatly packaged, coherent "Whole"—a History. Thus, Carlyle concedes that "if History is Philosophy teaching by Experience, the writer fitted to compose history is hitherto an unknown man." If Carlyle is trying to defend History, he has apparently admitted defeat. That is to say that Carlyle has admitted defeat only if History is a narrative of recorded "Experience."

The Utilitarians asserting that History is useless knowledge would claim victory after Carlyle admits that the writer of adequate History does not yet exist. After all, a form of knowledge never expressed accurately, is surely useless. Postmodernists, at least at this point of "On History," might even claim Carlyle as one of their own. Postmodernists see History as an artificial

construct forced upon what Carlyle calls the "Chaos of Being." For Postmodernists, it is precisely Carlyle's arguments about the unreliable inefficiency of narrative and the impossibility to see a "Whole" within the chaos of the infinite that leads them to argue that History is "just another fiction." In other words, the Utilitarian opponents of History and the Postmodernists seem to *give up* on History as a useless, meaningless activity—Carlyle does not: "Better were it that mere earthly Historians should lower such pretensions, more suitable for Omniscience than for human science; and aiming only at some picture of the things acted, which picture itself will at best be a poor approximation."<sup>12</sup> Thus, Carlyle calls on the historian not to attempt grasping all human experience, but to take a portion of human experience and recreate an approximate vision of the whole, similar to what an artist does. Carlyle then goes on to explain his concept of historian as "Artist." The "Artist in History" serves as both Carlyle's solution to the problem of "two difficulties [Philosophy and Experience] never wholly surmountable" and the connection between "On History," *The French Revolution*, and Carlyle's other works of History.

Carlyle now turns to the issue of History as "Philosophy." His definition of Industrialism identifies the effects of industrialization on society as one of his major concerns. It is no surprise, therefore, that Carlyle uses the terminology of Industrialism in his discussion of History. Carlyle relates that "it is with a growing feeling of the infinite nature of history, that in these times, the old principle, Division of Labour, has been so widely applied to it." Carlyle makes a compelling argument that, in attempt to grasp the infinite, historians have broken the overall approach to History into categories. Apparently like many others, Carlyle sees the various types of

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<sup>12</sup> Ibid., p. 221.

History as a kind of intellectual "Division of Labour."

Carlyle begins discussing the various categories of History by arguing, "The political Historian, once almost the sole cultivator of History, has now found various associates, who strive to elucidate other phases of human Life." History, Carlyle recognizes, does not only reside "in Senate-houses, in Battle-fields, nay, even in King's Antechambers." "[F]ar away from such scenes," Carlyle continues, "the mighty tide of Thought, and Action . . . a whole world of Existence . . . was blossoming and fading, whether the 'famous victory' were won or lost." Here Carlyle changes the focus of traditional ways of thinking about History. The mere relating of political events, what one could call a traditional view of History, is in actuality a subset of the sum total of all human experience. Carlyle points out that the historian "who sees no world but that of courts and camps . . . will pass for a more or less instructive Gazetteer, but will no longer be called an Historian"<sup>13</sup> One sees Carlyle placing the political historians into other, more accusatory categories: writers who only see series of events as History are mere "Artisans," those "Artists" who see political events as only part of the "Whole" are historians. If one defines History as an observed set of knowledge excluding an infinite set of unobserved knowledge, then the only way the historian can grasp a sense of the whole is through the parts, just as an artist does in creating a work of art. Thus, Carlyle is correct in excluding as "Artisans" those who describe the parts of a History without trying to describe the "Whole" of a History.

The next category of History that Carlyle addresses is ecclesiastical History. For Carlyle, the History of the Church is the most important category of History. Where political History deals with "the outward

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<sup>13</sup> Ibid., p. 222.

condition of his [mankind's] life," ecclesiastical History deals with "the inward and spiritual."<sup>14</sup> The place given ecclesiastical History speaks to its importance for Carlyle: "in its highest degree it were a sort of continued Holy Writ; our sacred books being, indeed, only a History of the primeval Church." In other words, church History done correctly attains the position of Holy Scripture. In Carlyle's view, however, the correctly done church History is nonexistent: "How far our actual Church Historians fall below such unattainable standards, nay, below quite attainable approximations thereto, we need not point out." Carlyle thus accuses church historians failing in the impossible—History as "Philosophy teaching by Experience." But, and perhaps more important in a Carlylean sense, the Church has also failed to produce a historian who, as "Artist," could take *part* of church History and make it convey an approximate sense of the "Whole." Carlyle complains that, like the political historian, the church historian's "inquiries turn rather on the outward mechanism, the mere hulls and superficial accidents of the object, than on the object itself." Carlyle is of the opinion that, like the political historian, the church historian has been merely an "Artisan" relating serial events, not an "Artist" writing history.

Below political and ecclesiastical History, Carlyle finds "Histories that relate to special separate provinces of human action; to Sciences, Practical Arts, Institutions, and the like." Carlyle continues by declaring, "Highest in dignity and difficulty" in this lower echelon of Histories, "would be our histories of Philosophy, of man's opinions and theories respecting the nature of his Being." He holds Philosophy in a high enough place to argue that, were the History of Philosophy done correctly, that History would be in the domain of

ecclesiastical History. Once again, however, Carlyle complains that philosophical historians have accomplished neither the impossible description of the "Whole," nor an approximate sense of a part of Philosophy. Like the other categories of History, Philosophy has produced only "Artisan" reporters, not "Artist" historians.

Another category of History Carlyle considers in "On History" is the "History of Poetry." Here one finds, yet again, Carlyle firmly believing that "a proper History of Poetry" should give "some glimpse of that unspeakable Beauty, which in its highest clearness is Religion." This "unspeakable Beauty," this spiritual connection, puts the History of Poetry in the same sphere as ecclesiastical and philosophical historians. The close link between Poetry and the human spirit makes the historian responsible for including the spiritual aspect of Poetry in the historian's approximation of the "Whole." Thus, like writers of ecclesiastical, political, and philosophical History, historians of Poetry find themselves under the same Carlylean accusation: the properly done History is the work of an "Artist" glimpsing the "Whole," and the existent Histories of Poetry are the works of "Artisans."

Towards the end of "On History," Carlyle discusses categories of History that have met with, in his opinion, some small measure of success. He claims, "Our histories of Laws and Constitutions . . . are of a much simpler nature, yet deep enough, if thoroughly investigated; and useful, when authentic, even with little depth." Thus, he admits to the existence of historians that have properly done their task. Carlyle continues by offering other successful Histories:

Then we have  
Histories of Medicine, of  
Mathematics, of Astronomy,

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<sup>14</sup> Ibid., pp. 222-223.

Commerce, Chivalry, Monkery; and Goguets and Beckmanns have come forward with what might be the most bountiful contribution of all, a History of Inventions. Of all which sorts, and many more not here enumerated, not yet devised and put into practice, the merit and the proper scheme may require no exposition.<sup>15</sup>

In this passage, Carlyle is not only acknowledging the existence of properly written Histories, he is also acknowledging that properly written Histories will certainly exist in the future. Carlyle's belief that proper History has, does, and will exist is fundamental to a reading of "On History" as a defense of History.

One might question the viability of arguing that an essay with such an apparently negative view of History is a defense of History. One answer to this question is that Carlyle does not have a problem with History: Carlyle has a problem with historians. History is, according to Carlyle, "the true fountain of knowledge."<sup>16</sup> It is the historians who fail to adequately draw knowledge from this fountain. A major point of Carlyle's defense of History, therefore, is that History is not useless knowledge, for History is the source of all knowledge. The problem with History, as Carlyle sees it, is that historians are unable to *properly* translate History into narrative. Another answer to the question of whether or not "On History" is a defense of History lies in Carlyle's call to continue the pursuit of accurate, good History. Carlyle pleads "let us keep the Ideal of it [History] ever in our eye; for thereby alone have we even a

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<sup>15</sup> Ibid., p. 223.

<sup>16</sup> Ibid., pp. 221-222.

chance to reach it."<sup>17</sup> Past failures do not diminish the possibility of future success in historians' attempt to write adequate History. Carlyle sees that the only sure way historians can fail in their task is if they give up the attempt to write proper History.

It is very interesting that problems concerning History, as Carlyle understood them, still plague historians today. Ann Rigney reveals some contemporary problems involved with historical research:

If historical research is premised on the real existence of an object beyond the inquiring subject, it also springs from the sense that there is more to be known and written about that object, that our knowledge of it is incomplete. Indeed, it could be said that historical works ... are necessarily incomplete as accounts of the historical world in its totality.<sup>18</sup>

In Rigney's passage, one hears the echo of Carlyle's "Chaos of Being"—there is simply no way for historians to grasp History as a whole because History is, by nature, infinite. Sorensen relates the postmodern argument that History is merely "a linguistic pattern that has been imposed on randomness in order to give it shape and direction."<sup>19</sup> Carlyle has no problem conceding the point that History is an attempt to bring artificial order to the infinite "Chaos of Being." The problem, with which Carlyle struggled gallantly, is the inability of historians to write better History. Thus, the inherent

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<sup>17</sup> Ibid., p. 223.

<sup>18</sup> Ann Rigney, "The Untenanted Places of the Past: Thomas Carlyle and the Varieties of Historical Ignorance," *History and Theory: Studies in the Philosophy of History* 35 (October, 1996), p. 340.

<sup>19</sup> Sorensen, "Postmodernism," p. 108.

limitations of historians are to blame for the existence of poor Histories—not History herself.

One can, therefore, read "On History" as a kind of negative—positive defense of History. Carlyle recognizes that History is inherently problematical. Indeed, even Carlyle's vision of the historian as "Artist" is problematical; he certainly had more than his share of critics. His point is that History is not to blame: historians are. History, perhaps like all forms of knowledge, is narratives—narratives, by nature, are unreliable and inaccurate. Approaches to History, although broken down into categories of specialization, still fail in the basic function of History—to gain an understanding of the "Whole" through an approximate representation of part. However, in "On History," Carlyle does not once call on historians to strike their tents and give up the struggle to write "proper" History. For Carlyle, History is too essential to human existence to simply stop attempting History—as the Utilitarians apparently did, and as the post-modernists have apparently done. In this sense "On History" is a defense of History: unreliable narrative, infinite narrative, "Artisan" reporters, and even "Artist" historians make History an essentially problematical science, but these problems offer no reasons to stop making the attempt to convey and understand History. One can certainly argue that Historians are the victims of language. After all, language is humanity's attempt to convey and understand. For the historian, the only tool available to decipher History is the flawed language of narrative. But, the difficulty historians face in writing History while handicapped by language does not mean that History is to blame, for History simply *is*. So, perhaps it is best to close, as Carlyle closed "On History," with a call to rally around History and wish her well. History is *real*. Good, responsible, accurate,

written History exists and more will exist. Every moment that presents itself and then passes away sees the creation of infinitely more History. To argue that History is "useless," or that it is "just another fiction" seems at least irresponsible. As for History herself, in the words of her defender, Carlyle, "let us wish her great and greater success."<sup>20</sup>

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<sup>20</sup> Carlyle, "On History," p. 223.

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## WHOM DID THE PRESS BLAME FOR THE BAY OF PIGS FIASCO?

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**Andrew Mikrut**

### **Introduction**

As the twentieth century comes to a close, it is clear that the United States is the only remaining "Superpower" in the World. The United States has reached this position through its tough stance on communism during the Cold War and its promotion and protection of the democracies throughout the world. However, this stance has not always been executed successfully and the United States has certainly had its share of failed military operations, both known and covert. An example of this failure was seen in the 1961 United States-sponsored invasion of Cuba. The United States and Cuba have similar histories which directly intertwine with one another. Ever since the American occupation of Cuba after the Spanish-American war of 1898 and the addition of the Platt amendment to the Cuban Constitution in 1901, the United States has maintained the right to intervene in the political or other affairs of the island. Thus, when Fidel Castro was able to overthrow the Batista government of Cuba in 1959 through revolution, the United States government began to see Castro and his movement towards communism as a threat not only to itself, but to the entire Western Hemisphere. As a reaction to these events, the United States Central Intelligence Agency (CIA) and the Eisenhower administration began to work on a plan for the purpose of overthrowing the Castro government of Cuba and establishing one more favorable to democracy and the policies of the United States.

In January of 1961, John F. Kennedy was sworn in as the President of the United States. However, the policy toward Cuba would remain the same. By now, the CIA was fully involved in the recruiting and training of Cuban exiles in preparation for an invasion. "The Eisenhower administration," observed Arthur M. Schlesinger, Jr., "thus bequeathed the new president a force of Cuban exiles under American training in Guatemala...and a plan to employ the exiles in an invasion of their homeland and to install...the provisional government of a free Cuba."<sup>1</sup> As Castro began to receive more support, especially from Eastern European countries and the Soviet Union, the Kennedy administration, including CIA director Allen Dulles and CIA deputy director for planning Richard Bissell, felt the time to implement the invasion was quickly approaching. Waiting any longer would allow Castro more time to establish his regime, thus making the invasion almost impossible. In April of 1961, Kennedy made the decision to go ahead. Within a matter of days from the start of the invasion, it became clear that it was not going to succeed. Decisions made by top officials in the United States government would eventually seal the fate of the Cuban exiles and the outcome of the invasion. The invasion indeed failed, and it was clear that the United States was directly involved.

To gain a better understanding of these events and their consequences, it is important to examine how they were covered by the newspapers of the United States. More importantly, whom did the press blame for the Bay of Pigs fiasco? The press, particularly the *New York Times* and *Chicago Tribune*, blamed the failed invasion on President Kennedy, the CIA, and other high ranking government officials. To

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<sup>1</sup> Arthur M. Schlesinger, Jr., *A Thousand Days* (Boston: Houghton Mifflin Company, 1965), p. 238.



determine if these newspapers were correct in placing the blame where they did, it is important to compare their findings with those of other sources.

### **Historiography**

The advantage of hindsight is that it allows a person to look at something in the past and see how that event shaped, in its entirety, other events around it. Historians use this ability as a way of finding out why things happened as they did and what they meant. It is easier for historians to look back on something and find out the stories behind the story than it is for journalists, or others, to try and find them out as they are occurring. With this in mind, we now turn to the historians to see how they view the events which occurred prior to, during, and after the Bay of Pigs incident.

President Kennedy was the person who eventually approved the go-ahead on the Cuba invasion, but sources indicate that the plan was not originally his. In 1959, after it was clear that Fidel Castro was leading Cuba toward communism, the Central Intelligence Agency and the Eisenhower administration began to interpret Cuba as a threat. They started to take what they viewed as necessary actions. "By December 1959 the CIA began to recruit Cuban exiles, and in March 1960 Eisenhower decided to arm and train an exile force for the purpose of invading the island and precipitating the overthrow of the Castro government."<sup>2</sup> Kennedy would be told of this plan as he was going through the presidential election process. Before his inauguration as president, he had a talk with Eisenhower regarding the situation in Cuba and possible courses of action. "We cannot let the present government there [Cuba] go on," he said. Then Kennedy asked, "Should

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<sup>2</sup> Quoted in Wilbur R. Chaffee, Jr., and Gary Prevost, eds., *Cuba: A Different America* (N.p.: Rowman & Littlefield, 1992), p. 9.

we support guerrilla operations in Cuba?" Eisenhower's response was unequivocal: "To the utmost."<sup>3</sup> Knowing that responsibilities do not fully land on Kennedy is essential to trying to determine who was responsible for the invasion itself.

Looking at the Cuba invasion, historians can examine the statements of the people who planned and participated in it, in order to determine what went wrong. After many scenarios were studied, most of which were devised by the CIA, the plan which was finally agreed on involved using B-26s to destroy Castro's air force. Then a landing of Cuban exiles would take place, at night, at a bay on the southern side of the island known as Bahia De Cochinos, or Bay of Pigs. Continually supported by B-26 operations, the landing force would set up a small government and try to rally the support of the underground Cuban revolutionaries until the Castro government was overthrown. No United States military personnel were to be involved in order to keep as little U.S. involvement as possible.

According to secondary accounts, the invasion was a complete failure. The United States was clearly involved with the operation and everybody knew it. But why had it failed? Secondary accounts blamed the planners of the invasion and the men directly involved with the decisions that needed to be made while the invasion was in progress, most of all President Kennedy. "The Bay of Pigs was a wild gamble. It failed because Kennedy and Bissell failed. They failed for altogether human reasons. The lure of a tar baby, whether called Cuba or Vietnam."<sup>4</sup> Was it because of the egos of these men? Possibly, but this shows the advantages of hindsight. Perhaps what is

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<sup>3</sup> Richard Reeves, *President Kennedy: Profile of Power* (New York, Simon and Schuster, 1993), pp. 31-32.

<sup>4</sup> Peter Wyden, *Bay of Pigs: The Untold Story* (New York: Simon and Schuster, 1979), p. 326.

more important are the accounts which were written while the Cuba invasion was taking place by those connected with the event.

### Primary Sources

Primary sources are critical in trying to understand any event of the past. They allow people the opportunity to see a particular event in context of the period in which it took place. Two of the major American newspapers during the time of the Bay of Pigs incident were the *New York Times* and the *Chicago Tribune*.

The *New York Times* has long been seen as a very highly reputable newspaper. The Bay of Pigs represented a major change for the newspaper. "*Times* reporting on the Bay of Pigs was a landmark in the progress of the paper from its Ochs-age role of defender-supporter-upholder of government to its contemporary status as an independent entity...."<sup>5</sup> One of the major reporters for the *Times* was Tad Szulc, who had spent a good portion of his career in Latin America. "He was the kind of reporter who is 'news-prone', as soon as Szulc arrived in a city or country something happened that made the headlines."<sup>6</sup> Tad Szulc would serve as a major source of information for the *New York Times*. He provided information to the *Times* that supposedly no one else was aware of, except for high-ranking government members. He had friends everywhere, including the Cuban underground, the CIA, areas of the State Department, and other "specialists."

The reliability of the *New York Times* would have to be considered exceptionally high due to the fact that its publishers were keen on telling the truth. "Even when conflicting courses have been taken (the reticence about giving full play to the Bay of Pigs Cuban Invasion plans of

1961), the publishers of the moment acted accordingly to what they believed to be the loftiest ethics in the tradition of Ochs."<sup>7</sup> However, to avoid the possible bias of one newspaper, it is important to look at at least one other.

Another major newspaper in 1961 was the *Chicago Tribune*. Known to be a conservative paper, when it came to the Bay of Pigs, the *Tribune* tended to be careful regarding who was to blame for the failure of the invasion. The reliability of the *Tribune* would have to be rated fairly good. Since it was a major newspaper, accuracy would have to be seen as a major responsibility. Reports the newspaper ran from Washington, D.C., regarding the Cuban invasion were written by *Chicago Tribune* Press Service Writers, indicating that they were interested in getting first hand accounts of various situations, including whom they would blame for the Bay of Pigs fiasco.

Besides newspapers, other primary sources include accounts by the people who were directly involved with the Cuban invasion. Books written with the help of the leaders of Brigade 2506 (the brigade that landed on Cuba), Arthur M. Schlesinger, Jr. (White House advisor to President Kennedy), and others help shed further light on what was going on inside the White House prior, during, and after the decision was made by President Kennedy to go ahead with the invasion. Of course, it is always important to remember that such accounts can be and most certainly will be biased in some way. They may be biased to protect the image of the authors and the people around them. Nevertheless, they offer insights into the picture of what was going on and what happened to make the Bay of Pigs one of the worst government-orchestrated events in the twentieth century.

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<sup>5</sup> Harrison Salisbury, *Without Fear or Favor* (New York: Times Books, 1980), p. 137.

<sup>6</sup> *Ibid.*, p. 148.

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<sup>7</sup> Richard Shepard, *The Paper's Papers* (New York: Times Books, 1996), p. 62.

## Results of Research

The Bay of Pigs was an operation that was American conceived, yet was essentially played out by Cubans. It was to remain secret, and United States involvement was supposed to appear minimal, if any at all. This did not happen. As early as January, 1961, the *New York Times* had learned about the training of Cuban exiles. It went ahead and printed what was known. A front-page headline read: "U.S. Helps Train an Anti-Castro Force At Secret Guatemalan Air-Ground Base."<sup>8</sup> The accompanying article then went on to say that the United States was directly involved: "The United States is assisting this effort not only in personnel but in material and the construction of ground and air facilities."<sup>9</sup> For an operation that was to remain covert, something had clearly gone wrong, yet there was no reaction from the White House regarding the article. A possible reason for this was simply that the White House was busy in the changing of administrations. The *New York Times* never fully followed up this story after it was published. Looking back, some of the editors and publishers regretted dropping the story. However, the drama did not stop there.

On April 7, 1961, the *New York Times* ran another article on page one written by Tad Szulc. The article essentially restated the previous article and went into greater detail about the events taking place on United States soil with regard to the recruiting and training of the Cuban exiles for the purpose of creating an anti-Castro regime which would eventually raid the island of Cuba. Henceforth, every day the

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<sup>8</sup> Paul Kennedy, "U.S. Helps Train an Anti-Castro Force At Secret Guatemalan Air-Ground Base," *New York Times*, January 10, 1961, section 1, p. 1.

<sup>9</sup> Ibid.

*New York Times* published a front-page article regarding the imminent invasion.

When the invasion was finally underway and the Cuban exiles were beginning to land in Cuba, the *New York Times* began to publish stories and editorials regarding the protection of Latin America from communism and social revolution by the United States. "Both the Eisenhower and Kennedy Administrations have recognized that the popular pressures for social justice in Latin America must be satisfied in order to forestall other Castro-type revolutions."<sup>10</sup> The paper's editorial section kept promoting day-by-day the need for the United States, because of the Cold War, to protect the western hemisphere from the evils of the communism. It continued to justify U.S. involvement in Cuba by saying, "The United States is engaged in an all-out struggle to save the Western Hemisphere for Democracy and Freedom."<sup>11</sup>

After it became clear that the Cuban exile force was facing total defeat, the *New York Times* began to switch pace a little bit, particularly in the editorial section. Although the paper continued to emphasize the need for the United States to protect the western hemisphere, it began to publish more pieces on the Cuban exiles and their struggle. "These modern fighters for liberty are not dying, or suffering wounds, or risking wounds or death for any money that can possibly be paid them.... But a few hundred men willing to die for what they take to be the truth may change history."<sup>12</sup>

Up to this point, the *New York Times* had yet to look for someone to blame for the failed invasion. This may partially be due to the fact that as of yet no one was quite sure

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<sup>10</sup> "The Landings in Cuba," *New York Times*, April 18, 1961, section 1, p. 36.

<sup>11</sup> "Cuba and the Cold War," *New York Times*, April 20, 1961, section 1, p. 32.

<sup>12</sup> "Truth on a Contested Beach," *New York Times*, April 21, 1961, section 1, p. 32.

if the invasion had been totally crushed. The paper had thus far continued to support any actions the United States had taken in respect to Cuba. When it became known that the invasion had failed and no further action was going to be carried out, the hunt for whom to blame was underway. The *New York Times* took part in the hunt.

By April 22, 1961, it was clear that the Cuban invasion was nothing short of a complete failure. So now the questions left to ask were: why had it failed, and who was responsible for that failure? To continue to look at the *New York Times*, we begin to see accusations leading toward the Central Intelligence Agency. A *Times* editorial argued: "On the American side, as is now clear, basic and inexcusable miscalculations were made by the C.I.A. ...it underestimated the magnitude of the problem and presumably gave poor advice to the White House and State Department."<sup>13</sup> No blame was ever placed on the Cuban exiles who took part in the invasion, and rightfully so. The Cuban exiles did not fail the United States; rather, the United States failed the Cuban exiles. This view was shared by the *New York Times*: "So far as the Cuban exiles were concerned, their bravery and passionate convictions could not be backed by adequate strength."<sup>14</sup> Although the *Times* emphasized that President Kennedy had taken full responsibility for the failure, it continued to probe further.

As the events surrounding the Bay of Pigs began to settle down, the *New York Times* continued to search for what exactly the failed Cuban invasion meant and what the United States was supposed to do now. Although the paper admitted that "there must be no repetition of the incredibly inefficient intelligence analysis of the Cuban situation which preceded last weeks

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<sup>13</sup> "The Lessons of Cuba," *New York Times*, April 22, 1961, section 1, p. 24.

<sup>14</sup> *Ibid.*

fiasco,"<sup>15</sup> it continued to support the position that the United States should fight for individual rights and democracy. So although the *Times* viewed the Bay of Pigs as a failure, it also stated that it was a failure from which the United States could learn.

Unlike the *New York Times*, the *Chicago Tribune* showed no indication that it knew about the planned invasion prior to its occurrence. After the invasion had taken place, the *Tribune* began to search for the reasons why the Bay of Pigs failed. The *Chicago Tribune* continued to write articles regarding the "fiasco" in Cuba weeks after the invasion took place. It used stories from the *New York Herald Tribune* to accompany front page headlines.<sup>16</sup> The editorial section of the newspaper seemed reluctant to point fingers at people who may have been responsible for the failed invasion. When the editors of the *Tribune* did write on the invasion, they, like the editorial writers of the *New York Times*, emphasized the need for America to stand up to communism: "No American enjoys the discomfiture of his country and no will fail to stand fast against the abhorrent designs of the Communist."<sup>17</sup>

On April 25, 1961, a day after President Kennedy took full responsibility for the Cuban fiasco, the *Chicago Tribune* made sure that it reported the fact that Kennedy took the blame. The headline on the front page read, "Cuba Policy Mine: Kennedy."<sup>18</sup> However, the *Tribune* never criticized the president directly for the failure. "When foreign crises flared, the *Tribune* firmly backed the President."<sup>19</sup> An

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<sup>15</sup> "A Policy on Cuba," *New York Times*, April 27, 1961, section 1, p. 20.

<sup>16</sup> "Report Cuba Plan Doomed By Advice of 3," *Chicago Tribune*, May 1, 1961, section 1, p. 1.

<sup>17</sup> "No Punch, But Neat Footwork," *Chicago Tribune*, April 25, 1961, section 1, p. 22.

<sup>18</sup> Robert Young, "Cuba Policy Mine: Kennedy," *Chicago Tribune*, April 25, 1961, section 1, p. 1.

<sup>19</sup> Lloyd Wendt, *Chicago Tribune* (New York: Rand McNally & Company, 1979), p. 736.

editorial which illustrated this support maintained: "We have never indulged in any partisan criticism of Mr. Kennedy over the Cuban fiasco."<sup>20</sup>

Walter Trohan, the chief of the *Chicago Tribune's* Washington bureau was more liberal than the rest of the newspaper's staff and was not shy about letting people know whom he thought was responsible for the failure of the Cuban invasion. In his "Report from Washington" (May 1, 1961), he wrote, "The full responsibility for incalculable harm wrought in Cuba has been shouldered by the President but there is no doubt that he was misled by those who told him a token landing of rebels would touch off a popular uprising."<sup>21</sup> Trohan blamed Kennedy's advisors for actually pushing President Kennedy into allowing the invasion to occur. So although the *Tribune* consistently mentioned President Kennedy as the person who assumed the blame for the Bay of Pigs fiasco, it was clear that others at the paper shared Trohan's view that the responsibility never fully lay with him. They looked to his top advisors to take much of the blame.

In comparing the *Chicago Tribune* reporting to that of the *New York Times* with regard to this national incident, it is clear that the *New York Times* was much more involved with this story than the *Tribune* ever was. The *Times* was also able to offer its readers more in-depth coverage and the opportunity to be aware of the invasion weeks or months prior to the Bay of Pigs incident.

Were the *New York Times* and *Chicago Tribune* correct in placing the blame for the Bay of Pigs fiasco on the Central Intelligence Agency, President Kennedy, and other high ranking

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<sup>20</sup> "Eisenhower Befriends Kennedy," *Chicago Tribune*, May 3, 1961, section 1, p. 16.

<sup>21</sup> Walter Trohan, "Report from Washington," *Chicago Tribune*, May 1, 1961, section 1, p. 4.

government officials? To answer this question one must look at the various books and articles written with hindsight about the events surrounding the Bay of Pigs. In his *Can Governments Learn?*, Lloyd Etheredge argues: "President Kennedy and the CIA planners made many overconfident assumptions about the Bay of Pigs plan."<sup>22</sup> Assumptions made by President Kennedy, Allen Dulles, Richard Bissell, and others were emphasized throughout books on the Cuban invasion. Assumptions regarding such things as U.S. involvement remaining secret and the expectation that Castro would lose his nerve during the invasion were all made by these men. Kennedy personally considered the Cubans already on the island as "volunteer patriots motivated to attempt, on their own, to liberate their homeland."<sup>23</sup> The failure of the invasion to create even a spark of revolution showed just how badly the administration overestimated this motivation. It also showed just how much control Castro actually had in Cuba. Other decisions that were poorly made during the invasion virtually sealed the failure of the mission. For example, President Kennedy canceled an air strike to avoid detection of United States involvement. One writer notes: "Without air superiority the expedition would be a sitting duck the next morning."<sup>24</sup> As the attack continued to get worse, no one in Washington quite knew what to do and could not understand why things had gone so badly. "The CIA's Richard Bissell, who had relentlessly urged covert action on the new administration, was dumbfounded."<sup>25</sup>

The information that these secondary sources offer show that the blame for the

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<sup>22</sup> Lloyd Etheredge, *Can Governments Learn?* (New York: Pergamon Press, 1985), p. 143.

<sup>23</sup> *Ibid.*, p. 37.

<sup>24</sup> Aleksandr Fursenko and Timothy Naftali, *One Hell of a Gamble* (New York: W.W. Norton and Company, 1997), p. 93.

<sup>25</sup> *Ibid.*, p. 95.

Bay of Pigs Fiasco clearly lay with the top officials in Washington. So the contemporary accusations of the *New York Times* and *Chicago Tribune* blaming the invasion on President Kennedy, the CIA, and other top government officials would seem to be accurate. These newspapers devoted much time and effort to finding the stories and facts behind them. One might well contrast their work with the deeply flawed efforts of the U.S. government in planning the Cuban invasion of 1961.

### **Conclusion**

The Bay of Pigs turned out to be just the beginning of bad blood between the United States and Cuba. American prestige was certainly damaged around the world for the actions it took in April of 1961, not so much because the United States was taking a stand against communism but rather the administration's flawed plan and its ultimate failure. The consequences of the Bay of Pigs invasion were certainly felt immediately after it took place; they are still being felt today. For one government to take such drastic action against another may be understandable, but the American course of action in Cuba in 1961 proved to be inexcusable. For well over thirty and now approaching forty years after the hard line on the Castro's Cuba was taken by the United States, it has shown to be of little success. Fidel Castro is still in power in Cuba and has outlived nine changes in the presidency of the United States.

Another consequence of the Bay of Pigs is the effect it had on John F. Kennedy's reputation. Having to assume the blame for the invasion, Kennedy was quoted as saying: "How could I have been so stupid to let them go ahead?"<sup>26</sup> President Kennedy obviously knew that his reputation would suffer some in the years following the invasion. Another possible consequence of

the Bay of Pigs that directly relates to Kennedy was his assassination in Dallas in 1963. Many people speculate that the Cuban government, particularly Castro, may have played a part in the shooting of President Kennedy.

In 1962, the United States would again directly intervene in a situation regarding Cuba. In October of 1962, the world came as close to nuclear war as it ever has come. After the failure of the Cuban invasion and the development of Cuba into a communist state, the Soviet Union, with the full approval of Castro, attempted to place nuclear missiles on the island. The United States, as would be expected, did not approve of the placing of nuclear weapons in a hostile country ninety miles from its border. It attempted to block further missiles from entering Cuba. After a stand off, with the promise of the United States to take no further military intervention in Cuba, the Soviet Union brought its missiles home, and thus the world barely escaped nuclear holocaust. The failed Cuban invasion of 1961 was a major reason for the Cuban Missile Crisis of 1962 because the Soviets concluded they were holding a strong hand.

The Bay of Pigs fiasco was an event that probably never should have happened. Its cost in lives and American prestige far outweighed any advantages the plan Kennedy implemented could have achieved. The operation itself was poorly planned, and decisions from the top were poorly made. It did not take anyone too long to figure this out. Newspapers at the time knew this, and the historians have shown that they were right.

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<sup>26</sup> Wyden, *Bay of Pigs*, p. 8.

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## MATH VERSUS MACHINE: THE STRUGGLE TO DISCOVER LONGITUDE

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**Steven Ray**

### **Introduction**

In the year 1730, the Astronomer Royal, Sir Edmond Halley, received a visitor at Greenwich. The visitor's name was John Harrison. He was a self-taught clock maker who, at the age of thirty-seven, had come to Greenwich to present Halley with the technical notes for the construction of a machine. The machine was for keeping time at sea with sufficient accuracy to achieve what Sir Isaac Newton had deemed impossible, and Halley himself had thought improbable: it would allow ships' navigators to determine their longitude by keeping the time at Greenwich, England, for comparison with the local time of the ship. He came to Halley because the Astronomer Royal was a Commissioner of the Board of Longitude.<sup>1</sup> This board was created by a 1714 Act of Parliament to examine such submissions and award cash prizes to applicants whose ideas met the requirements of the Act. This paper will examine why it was desirable to find the longitude, and how, after his innocent encounter with Halley, John Harrison and his invention, the chronometer, became the focus of an intense rivalry, which was to last 45 years. It was fought between begrudging astronomers, both on and off the Board of

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<sup>1</sup> Dava Sobel, *Longitude* (New York: Walker and Company, 1995), p. 75; David S. Landes, *Revolution In Time* (Cambridge, Massachusetts and London, England: The Belknap Press of Harvard University Press, 1983), p. 148; Colin A. Ronan, *Edmond Halley: Genius in Eclipse* (New York: Doubleday & Co., 1969), p. 205.

Longitude, and clock makers, particularly Harrison, in the contest for the coveted Longitude Prize.

What was the need for determining longitude? And why did the Board of Longitude delay for so long in extending Harrison the official recognition that was his due? England was expanding her overseas shipping in a quest for profits from colonial enterprises like mining gold or raising new crops like tobacco for sale at home. The search for new imports was the rule of the day as new voyages of discovery felt their way into the far corners of the Earth. These nautical adventurers took the first tentative steps into the dangers of deep-water travel by dead reckoning. Attention must be focused on shortcomings of such methods, as well as the advantages to be had in improvements such as those offered by Harrison and his rivals. I have found powerful voices of the age to represent their respective interests in this contest. These range from the stalwart Sir Isaac Newton for the astronomers, to no less a person than King George III for John Harrison.

In the end, the delays in approving the chronometer were the result of bureaucratic nitpicking and the professional jealousy of astronomers who took advantage of John Harrison's perfectionist desire to offer up to the Board of Longitude a sea clock that would give them their money's worth. Their efforts to deny Harrison his prize money would ultimately fail, but not before they denied him, well into old age, the savor of his accomplishment and the pleasures of his winnings. Indeed, when the Board was finally disbanded in 1828, it would do so after having petulantly refused to recognize anyone as having completed the great task.<sup>2</sup>

This paper will be organized in the following manner. The introduction will be followed by a section reviewing the

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<sup>2</sup> Sobel, *Longitude*, p. 163.

problems faced by mariners in deep water navigation and events leading to the establishment of the Longitude Prize, as well as the views of experts on possible solutions to the longitude problem. A section will follow focusing on the opinion of leading astronomers that longitude could only be calculated through improved astronomical instruments and charts for sailors, rather than the unlikely development of a clock capable of keeping accurate time in shipboard conditions. After this I will discuss the results of my research, which show that the Board of Longitude, biased in favor of astronomers' longitude solutions, resorted to both changing the rules and sabotaging of Harrison's chronometers. Attention will be given to the primary source of Isaac Newton's comments on longitude and the effect his opinions had on convincing later officials to treat Harrison's chronometer with undue skepticism. The Astronomer Royal, and the self-serving behavior of the Board of Longitude Commissioner, Nevil Masklyne will also be examined. A brief conclusion will follow, showing how the actions of the board's sponsors fit the observations of Rediker concerning profit motive,<sup>3</sup> and how things turned out in the years that followed the much delayed invention of the chronometer by John Harrison.

### **Deep Water Navigation**

There was much the first oceangoing sailors had to contend with when venturing out of sight of land. The greatest problem they faced was getting lost. They had no reliable maps of the stars north of the equator to steer by, and no maps at all of the stars south of the equator. They had no

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<sup>3</sup> Rediker, Marcus, *Between the Devil and the Deep Blue Sea* (Cambridge: Cambridge University Press, 1987), p. 19.

accurate instruments for measuring their latitude by the stars, and no good maps of the world to help find their way to their destinations and back to home ports. Even as their discoveries of new ocean currents and land masses reached Europe, the charted locations of these discoveries would prove as haphazard as the known features of the old world. Sailors had to rely on what was called dead reckoning to steer their vessels.<sup>4</sup>

Dead reckoning involved finding the position of a ship by first determining its speed. This was done by throwing overboard a log attached to a line of rope with knots tied along its length at intervals of 1 fathom (6 feet). As the log receded from the stern, it pulled the rope overboard and the navigator counted the number of knots crossing the railing over a time interval of 30 seconds. This time was measured with a 30-second sand glass. Having determined his speed, the navigator checked his direction on the compass, subject to error by magnetic variation, and compared this information with the amount of time the ship had spent sailing on that particular heading.<sup>5</sup> The length of headings were often displayed for the navigator on a traverse board with a 32-point compass face. Eight peg holes lined the spine of each point radiating from the center of the board. A peg was moved along the holes on the compass heading at the completion of each half-hour spent on any heading during a four-hour watch. The time was again determined by sand glass. Then, taking this into account along with his best assumptions on wind and water currents in the area, the navigator determined his longitude.<sup>6</sup>

The results of this method were predictable. More often than not, the ship became lost at sea, unable to find its

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<sup>4</sup> Douglas Philip-Birt, *A History of Seamanship* (New York: Doubleday & Company, Inc., 1971), p. 196.

<sup>5</sup> *Ibid.*, p. 193.

<sup>6</sup> *Ibid.*, p. 191.



intended landfall. In such circumstances, crews faced death from scurvy or starvation as ship's stores ran low of food and drink. The only thing a captain could do was waste time and effort searching the target area for sight of land.<sup>7</sup>

The most famous example of such mishaps involved a fleet of ships of the Royal Navy commanded by Commodore George Anson. On March 7, 1741, Anson was on his way to the Pacific by way of Cape Horn. But his inadequate maps and inability to accurately determine his longitude by dead reckoning led him to misjudge his position, wasting days of travel time trying to reach the point he was aiming for. Having finally rounded Cape Horn, and having become separated from several of his ships (including *Wager*, which was wrecked in South America, her few survivors taking eight years to return to England),<sup>8</sup> he set his course toward Juan Fernandez Island to replenish his ship's stores. Having reached Juan Fernandez' latitude of 35 degrees south, he had no way of knowing for sure if his longitude lay east or west of the island. He headed west for four days before losing his resolve and turning east. Two days later, he sighted the coast of Chile, an enemy Spanish colony. He turned west again, realizing he was probably only hours away from his destination when he had turned east. By the time he reached Juan Fernandez Island, eleven days later, over half of his men were dead.<sup>9</sup>

Nearly as often the opposite occurred, with unexpected coastlines springing suddenly into view through fog or darkness, resulting in shipwrecks and loss of life to drowning and injuries. This was the

fate of another fleet of the Royal Navy. It happened 37 years before the voyage of the ill-fated *Centurion*, and much closer to home. The fleet was under the command of Admiral Sir Cloudisley Shovell, returning from battle with French forces at Gibraltar. On the night of October 22, 1707, lost in fog for 12 days, Shovell was trying to enter the English Channel. But his team of navigators had badly miscalculated their position, using dead reckoning and charts placing the Scilly Isles ten miles north of their true position. They discovered their error when the rocky coast of the Scilly Isles emerged from the gloom ahead. Shovell's flagship, *Association*, crashed into the rocks and sank with the loss of all hands, save the admiral himself. Also unable to react in time, the *Eagle* and the *Romney* collided with the rocks and went down with all hands, save the *Romney's* quartermaster. The *Firebrand* dashed against the rocks, but managed to sail back away, only to find her hull so badly holed that she sank anyway. All but 23 of her crew of 500 drowned. Only the *St. George* and the *Phoenix* had time to avoid the rocks entirely.<sup>10</sup>

### **Clocks Versus Stargazing**

These lessons taught in human blood of the need for a way to find longitude at sea were not isolated, nor were they new. From the night of December 20, 1492, when the *Santa Maria* was wrecked on the coast of Hispaniola, European sailors had lost ships and crews to the dangers of uncertain navigation on the open sea. Such hazards might have been avoided if mariners from Columbus to Shovell and Anson had had an accurate clock aboard their ships. Each hour behind Greenwich time represents 15

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<sup>7</sup> Sobel, *Longitude*, p. 14.

<sup>8</sup> Keith Huntress, *A Checklist of Narratives Of Shipwrecks and Disasters At Sea To 1860, with Summaries, Notes, and Comments* (Ames: The Iowa State University Press, 1979), p. 19.

<sup>9</sup> Sobel, *Longitude*, p. 17.

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<sup>10</sup> Ibid., p. 11; W.E. May, *A History of Marine Navigation* (New York: W. W. Norton & Company, Inc., 1973), p. 27; Derek Howse, *Greenwich Time* (Oxford: Oxford University Press, 1980), p. 14.

degrees, since the Earth rotates by that amount in that time. Provided that he had an accurate clock showing the time at Greenwich, the navigator could have worked out his position by subtracting local time from Greenwich time.<sup>11</sup>

Many methods for determining longitude by improving clocks had been suggested. Galileo discovered a pendulum swing takes the same interval of time for wide or narrow arcs. The Dutch astronomer Christian Huygens applied this principle to invent the pendulum clock, which was much more accurate, but could not be used at sea because the motion of the ship would throw the pendulum off pace. If a clock were going to be used to determine longitude, it would have to be spring wound.<sup>12</sup>

Although springs exert progressively weaker force as they unwind, this could be compensated for by winding the spring in a barrel, to which the spring was attached. As the spring unwound it turned the barrel which pulled on a cord or chain fastened to the outside of the barrel, reeling it in like fishing line. The other end of the cord was wrapped around the main clock drive to be turned, called a fusee (Latin for spindle). The spring did its hardest work when it was still tightly wound and exerting a stronger pull, turning the narrowest end of the tapering fusee first. Its work became easier as it weakened, and the gut unwound toward the broad end of the cone, like the gearing system on a bicycle. Unfortunately, due to varying metal quality, age, temperature, and lubrication problems, clocks still lost as much as four minutes a day. Since each minute at the equator was equal to 15 miles, navigation errors increasing by 60 miles a day over voyages lasting weeks or months made early clockworks unacceptable for deep water navigation.<sup>13</sup>

A second method for finding longitude was through astronomical observation. Here again, it was Galileo who made the first useful contribution. When he discovered the moons of Jupiter, it occurred to him that they were eclipsed periodically by passing into Jupiter's shadow. Galileo realized that if these eclipses could be predicted and accurately timed, astronomers could use them to find longitude exactly as with the eclipses of our moon. Better still, there were four moons available to track instead of one, and their rapid orbits eclipsed frequently over a much shorter period of observation. This method was adopted extensively for surveying on land, but was useless at sea, since telescopic sightings of the tiny satellites were impossible from the rolling deck of a ship.<sup>14</sup>

### **An Act of Parliament**

In 1714, mathematician Humphrey Ditton and William Whiston, Mathematical Master at Christ's Hospital, devised what they believed to be a useful third method for finding longitude at sea—lightships. By this method, ships would be permanently anchored at 600-mile intervals along the world's principal sea routes on known points of latitude and longitude. Every day at midnight, Prime Meridian Time (the Peak of Tenerife served as their Prime Meridian), an explosive flare would be fired by each lightship to an altitude of 6,440 feet, where it would detonate. Ships at sea need only consult their charts to know which lightship is closest and then measure the difference in time between the flash of flare detonation and the sound of the explosion to determine their distance from the lightship. Since each lightship's position was a known point of latitude and longitude, once a navigator computed his position relative to the

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<sup>11</sup> Howse, *Greenwich Time*, p. 192.

<sup>12</sup> *Ibid.*, p. 13.

<sup>13</sup> Landes, *Revolution*, p. 86.

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<sup>14</sup> Howse, *Greenwich Time*, p. 12.

lightship, he had his position relative to the Prime Meridian as well.<sup>15</sup>

The unworkable nature of this plan should have been immediately obvious. Leaving aside Ditton and Whiston's miscalculation that the Atlantic is only 300 fathoms deep (it averages a depth of 2,000 fathoms), or their hope that the lightships would be spared from attack by pirates or warships, or the difficulty in locating the longitudinal positions for the lightships to anchor in the first place, and they were still faced with the enormous cost of such a venture.<sup>16</sup> Who was to construct these ships? How would they be manned? And who would pay their crews? Undeterred by their detractors, Ditton and Whiston published their proposal, *A New Method for Discovering the Longitude both at Sea and Land*, which prodded London's shipping interests into uniting behind a call for government action.<sup>17</sup>

On May 25, 1714, the House of Commons Journal published a petition "of several Captains of her Majesty's ships, Merchants of London, and Commanders of Merchantmen, in behalf of themselves, and all others concerned in the Navigation of Great Britain..." which called on Parliament to establish a panel of experts to examine Ditton and Whiston's case and provide a summary of other possible methods under investigation that might yield useful results. The Parliament gave its assent, selecting the greatest minds in British science of that day to sit on the distinguished panel. These included Isaac Newton and Edmond Halley.<sup>18</sup> The panel's findings were mainly the work of Newton. He reported, "...There have been several Projects, true in the Theory, but difficult to execute: One is by a watch to keep time exactly...." This option

he dismissed, saying, "...By reason of the Motion of a Ship, the Variation of Heat and Cold, Wet and Dry, and the difference of Gravity in different Latitudes, such a watch has never been made." He then described the two leading methods of astronomical discovery. The moons of Jupiter he eliminated "...By reason of the Length of Telescopes required to observe them, and the Motion of a Ship at Sea, those Eclipses cannot yet be there observed...." The Moon of Earth Newton thought held the most promise, "...her Theory is exact enough to determine the Longitude within Two or Three Degrees, but not within a Degree." The fourth, and final option was what he called "Mr. Ditton's Project." This he dismissed because it was too easy to lose the correct time for firing in bad weather; he added that he wasn't an expert on explosives and couldn't judge if such a device were practicable.<sup>19</sup>

Already, at this early date, Newton was distinguishing between methods for keeping the longitude with clocks or lightships, as opposed to finding the longitude with lunar sightings and eclipses of Jupiter. This seemingly fine point was to prove the crux of the astronomer's argument against Harrison in the struggle to come. Newton believed that no instrument for keeping accurate time could be built. Therefore, a ship's clock was bound to lose time and therefore the longitude. And once that time was lost, it could not be regained. A captain depending on a clock to keep his longitude for more than a few days would be in real difficulty if he had to reset it. A clock's only real use at sea would, therefore, be to keep the longitude for brief periods after it was found by other means. Newton argued it was best for sailors to find the longitude with a method that could be used anywhere at anytime. This could only be done through observation of the moon,

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<sup>15</sup> Ibid., p. 47.

<sup>16</sup> Sobel, *Longitude*, p. 48.

<sup>17</sup> Ibid., p. 50.

<sup>18</sup> Howse, *Greenwich Time*, p. 50.

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<sup>19</sup> Ibid., p. 51.

weather permitting. So he used his influence to steer the intent of the legislation, and the search for longitude, in the direction of astronomical calculations.

As a result of Newton's opinions, Parliament passed "A Bill for Providing a Public Reward for such Person or Persons as shall Discover the Longitude at Sea." Better known as the Longitude Act, it established a Board of Longitude, whose Commissioners would include the "first Lord of the Admiralty; the Speaker of the House of Commons; the First Commissioner of the Navy; the First Commissioner of Trade; the Admirals of the Red, White, and Blue Squadrons; the Master of Trinity House; the President of the Royal Society; the Astronomer Royal; the Savilian, Lucasian, and Plumbian professors of mathematics at Oxford and Cambridge Universities; and ten named Members of Parliament."<sup>20</sup>

These Commissioners were empowered to offer a reward of 10,000 pounds to anyone devising a method to determine longitude "...To one degree of a great circle, or Sixty Geographical Miles... Fifteen Thousand Pounds, if it Determines the same to Two Thirds of that Distance... Twenty Thousand Pounds, if it Determines the same to One half of the same Distance..." The sum of 20,000 pounds is equal to 500,000 pounds in 1980's currency. In addition to these sums, the board could award advances upwards of 2000 pounds for ideas that looked promising. Queen Anne assented to the Act on July 20, 1714.<sup>21</sup>

The technique that was the apple of Newton's eye was known officially as lunar distances, and unofficially as lunars. The principle of lunars was fairly straight forward. The moon moves faster across the sky than any other visible celestial body. It travels an average of 33 seconds of arc for every minute of time. This rapid movement

lets the moon serve as the hand of an astronomical clock pointing to the stars as the hands of an ordinary clock point to numbers. If navigators could take a reading "at a known local time of the angular distance of the moon from some fixed star and compare this with the predicted time of the same observation for some place of known longitude, the difference in time could be converted into a difference in space."<sup>22</sup>

To use the lunars method would involve several requirements. These include a way to measure lunar distances; a clock that could keep local time accurately during the six to 18 hours between a daytime solar reading and a nighttime lunar reading; and an accurate table of lunar distances and times for places of known longitude.<sup>23</sup>

It is clear from Newton's correspondence over the next several years that his mind was firmly made up. Only eight years after the Longitude Act went into effect, he wrote, "This improvement must be made at last, not by watchmakers or teachers of navigation, or people that know not how to find the longitude at land, but by the ablest astronomers."<sup>24</sup>

Newton's opinions carried considerable weight. Since he was both president of the Royal Society and had held the Lucasian Professorship at Cambridge for thirty years, Isaac Newton was entitled to hold two of the seats on the Board of Longitude.<sup>25</sup> His reputation as the greatest mind of the age only enhanced his power, causing other Commissioners to refer project submissions to him for judgment. This policy had the effect of allowing

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<sup>22</sup> Landes, *Revolution*, p. 151.

<sup>23</sup> *Ibid.*, p. 152.

<sup>24</sup> Newton to Burchett, October 21, 1721, in A. Rupert Hall and Laura Tilling, eds., *The Correspondence of Isaac Newton* (7 vols., Cambridge: Cambridge University Press, 1977), 7, p. 172.

<sup>25</sup> Sobel, *Longitude*, p. 52.

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<sup>20</sup> *Ibid.*, p. 52.

<sup>21</sup> Howse, *Greenwich Time*, p. 52.

Newton to set board policy in much the same way he had guided writing the Longitude Act. When pressed on the issue of discovering longitude by non-astronomical means, he clung to his convictions and stressed the legal technicalities of finding versus keeping the longitude. “Nothing but astronomy is sufficient for this purpose. But if you are unwilling to meddle with astronomy (the only right method and the method pointed at by the Act of Parliament) I am unwilling to meddle with any other method than the right one.”<sup>26</sup> This point of view, and the policies that grew out of it would long outlive Sir Isaac Newton. He died in 1727. It was 11 years before John Harrison came to Halley, and found the deck was already stacked against him.

### The Chronometer

John Harrison had already devised two components to increase the accuracy of clocks on land. The first of these was the gridiron pendulum. Before Harrison, pendulum clocks were subject to inaccuracy caused by temperature change. As it grew hotter, the pendulum expanded and swung more slowly, slowing down its rate of time keeping. As it grew colder the pendulum contracted and sped up, accelerating the clock. This happened with every metal used in making pendulums. The only thing that varied between metals was the rate at which each expanded and contracted when exposed to changes in temperature. But the gridiron pendulum was constructed as a series of rods of different metals whose differing rates of expansion and contraction would counteract one another and keeping the clock on the right time.<sup>27</sup>

Harrison’s second innovation was the grasshopper escapement. An

escapement is the component of a clock that blocks and releases the teeth in the drive wheel according to the speed of the regulator. Earlier escapements were mounted on rotating metal rods that were plagued by friction. The grasshopper escapement flicked out like the insect’s hind legs, friction free, thanks to Harrison’s use of a tropical hardwood called *lignum vitae* that exudes its own grease, making the mechanism self-lubricating.<sup>28</sup>

Testing his new clocks against the regular motion of stars in the night sky emerging from behind a neighbor’s chimney, John Harrison discovered his clocks kept time with a rate of error of one second per month. This was at a time when the finest clocks on land lost one minute per day.<sup>29</sup> It was this achievement which led him to take on the challenge of the Longitude Prize.<sup>30</sup>

The Astronomer Royal, Sir Edmond Halley, saw the great promise in Harrison’s notes and diagrams. But he knew the inherent bias of the Longitude Board was toward an astronomical solution to the problem. This would work against Harrison unless he had actually constructed a device. So Halley referred the young man to a London clock maker named George Graham who so approved of Harrison’s plans that he loaned Harrison 200 pounds, interest free, out of his own pocket to construct a prototype.<sup>31</sup>

John Harrison labored for five years to construct the device with the help of his brother, James. The result he named Harrison’s No. 1, or H-1 for short. It stood three feet high and weighed 75 pounds. The device had four dials. “One dial marks the hours, another counts the minutes, a third ticks off the seconds, and the last denotes

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<sup>26</sup> Hall and Tilling, eds., *Correspondence of Isaac Newton*, 6, p. 212.

<sup>27</sup> Sobel, *Longitude*, p. 71.

<sup>28</sup> *Ibid.*, p. 69.

<sup>29</sup> *Ibid.*, p. 72.

<sup>30</sup> *Ibid.*, p. 73.

<sup>31</sup> *Ibid.*, p. 75; Ronan, *Halley*, p. 205.

the days of the month.”<sup>32</sup> The inner mechanism bristled with shiny brass components at odd angles. And each component in and of itself was a Harrison innovation to defeat some aspect of the sea clock problem. The gear wheels were of hard oak, to avoid rust and corrosion. The force of the two main springs were equalized by a central fusee. The twin brass-knobbed straight-bar balances of the regulator projected up like antenna. This device was spring wound and mounted on anti-friction wheels. It measured out the clock’s rhythm by swinging in dual seesaw motion as if geared together. They were self-contained and counterbalanced to withstand any motion of a ship. The four balance springs were mounted on gridirons to compensate for temperature changes. It was contained in a cabinet measuring four feet square.<sup>33</sup> In 1735, John Harrison returned to London and presented his machine to George Graham.

Graham took the chronometer to the Royal Society, rather than the Board of Longitude. Despite an enthusiastic reception by the influential Royal Society, the board Commissioners and the Admiralty waited a year before scheduling the sea trials required for the device under the terms of the Longitude Act. And when they finally did test H-1, it was on a trip to Lisbon, instead of a destination in the West Indies, as required by the Longitude Act. But the clock performed flawlessly on the trip to Portugal and back. During the return voyage, Harrison even managed to correct the captain on his dead reckoning longitude calculations, which the H-1 showed to be off by 60 miles, much impressing the captain.<sup>34</sup>

This would be H-1’s only sea trial. If Harrison had stood on his achievement and demanded a proper sea trial to the West

Indies, his troubles might soon have been over. He could demonstrate a clock that met the conditions of keeping the longitude to less than half a degree of a great circle set by the Act of Longitude and lay claim to his 20,000 pounds in prize money. But on June 30, 1737, the Board of Longitude met for the very first time in its 23 year history to consider the merits of a worthwhile submission. Eight Commissioners were in attendance, Halley among them. And before this distinguished body, Harrison made critical comments of the H-1’s performance. He was not satisfied with simply getting the job done. He wanted it done right. So he did not ask for a second sea trial for H-1. He said he wanted an advance of 500 pounds and two years to build a smaller, improved version of his chronometer.<sup>35</sup> The board gave him what he asked for. And he gave his rivals for the Longitude Prize two things they needed, a warning that Harrison had the prize within his reach, and time to do something about it.

The science of astronomy was also achieving the necessary breakthroughs to enjoy successes in its goal of measuring lunar distances. And while John Harrison tinkered with his H-1’s successors, astronomers worked hard to complete their tables and charts to enable sailors to find longitude by lunars to an accuracy of half a degree. A leading figure in this achievement was Nevil Maskelyne, a rising star among astronomers. My three principle secondary sources (Sobel, Howse, and Landes) all agree he was to become Harrison’s chief rival for the Longitude Prize. Maskelyne built his reputation by sailing to the island of St. Helena to witness a transit of Venus and test the accuracy of astronomical tables developed by the astronomer, Tobias Mayer, for locating longitude by lunars. He succeeded in finding longitude to less than one degree

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<sup>32</sup> Sobel, *Longitude*, p. 79.

<sup>33</sup> *Ibid.*, p. 78; Landes, *Revolution*, p. 147.

<sup>34</sup> Sobel, *Longitude*, p. 79.

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<sup>35</sup> *Ibid.*, p. 83.

with a sextant and Mayer's tables. When he returned home he published his *British Mariners' Guide* to explain the lunars observation technique. The success of this trip, and one to Barbados in 1765, prompted King George III to appoint Nevil Maskelyne, who was only age 33, the new Astronomer Royal. The made Maskelyne a member of the Board of Longitude automatically. And he lost little time in proposing that his new *Nautical Almanac*, first published in 1766, be considered for the Longitude Prize. Oddly, no one seems to have seen a conflict of interest.

H-2 took four years to build. Unsatisfied with it, Harrison left it with the Royal Society for testing. It never underwent sea trials. The H-3 took 17 years to finish. He used its development to find better solutions to old problems of irregularity, friction and temperature change, presenting H-3 to the board in 1757 and announcing he intended to build something smaller. This time he did not dawdle. When H-4 was completed in 1759, it proved to be Harrison's crowning glory. Only 5.2 inches in diameter and weighing about three pounds, H-4 met all of the requirements of the Longitude Act set by Parliament in 1714.<sup>36</sup> Perfectionist persistence had paid off. But it had taken a quarter century since the sea trial of H-1. In that long period, attitudes had changed toward Harrison and his remarkable devices.

### **Raising the Bar**

There was something unseemly about H-4. It was the very ease by which it functioned that made its detractors resent the device. Astronomers, admirals, mathematicians, and others making up the Board of Longitude all began to see the clock as deficient precisely because of the lack of brain power required to use it. They spent their careers depending on their own

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<sup>36</sup> Landes, *Revolution*, p. 150.

figures and had excelled in life as a result of their skills. Now along came Harrison with his clockworks, making the kind of effort at which they were good obsolete. The entrenched interests of the scientific profession were threatened.<sup>37</sup>

When the H-4 completed its sea trial, a voyage to Jamaica from November 1761 to March 1762, John Harrison finally asked for the balance of his prize. The Board of Longitude's response was to change the rules on awarding prize money.<sup>38</sup> Harrison would get half of his prize money if he disclosed his secrets and handed over all of his machines as public property to Astronomer Royal Maskelyne. The second half of his prize money would only be awarded when someone other than John Harrison succeeded in making copies of H-4 that were accurate enough to find the longitude to within 30 miles.

When Maskelyne came to Harrison's house to collect the chronometers, his men dropped the H-1 before Maskelyne's eyes and damaged it severely. Harrison had no doubt it was deliberate, especially when the sensitive clocks were loaded onto an unsprung cart to be rattled over the streets to the Greenwich observatory.<sup>39</sup> It was there at the observatory that Maskelyne began his assigned tests of the clocks' accuracy. He kept the H-4 bolted to a window seat and sealed in a glass case. In full sunlight the case was a greenhouse, while the thermometer used to monitor the clock's temperature was kept outside of the glass case in the shade. Some said Maskelyne handled the H-4 roughly during its daily winding. The ten month trial period saw H-4 gain as much as twenty seconds a day. Then during six consecutive simulations of a six-week voyage to the West Indies, the clocks gained times exceeding 13 minutes,

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<sup>37</sup> Sobel, *Longitude*, p. 99.

<sup>38</sup> Landes, *Revolution*, p. 151.

<sup>39</sup> *Ibid.*, p. 151; Sobel, *Longitude*, p. 37.

which would misplace a ship by over 200 miles. The Astronomer Royal took this information gained by his sabotage and reported to the board that Harrison's chronometers were not adequate.<sup>40</sup>

The job of building a copy of the H-4 was given to London watchmaker, Larcum Kendall. His copy, the K-1 was sent to the Pacific with Captain Cook's second voyage. The voyage of three years passed from the tropics to the Antarctic. Cook reported that "Mr. Kendall's watch has exceeded the expectations of even its most zealous advocate and being now and then corrected by lunar observations has been our faithful guide through all the vicissitudes of climates."<sup>41</sup> Cook had a copy of the lunar distance tables in the new *Nautical Almanac*. He was able to use the complex equations to find his longitude, but the results show that the lunars method was impractical because of its complexity. It was beyond the skills of the common seaman to match the mathematical average of observations against the positions in the nautical tables.<sup>42</sup>

Finally, Harrison went to King George III with his grievances. Told the full story, the king is reported to have said "By God! Harrison, I will see you righted!"<sup>43</sup> Finally, by Act of Parliament passed in June of 1773, John Harrison was awarded 8,750 pounds. In a final act of spite, the Board of Longitude had deducted the amount of several cash advances from the final award. The victory was short-lived, for John Harrison was 80. He died on March 24, 1776. Eight months earlier Captain Cook had returned from a voyage proving once

and for all that longitude could be found with a chronometer.<sup>44</sup>

## Conclusions

Motivated by the quest for greater profit and national glory, British merchants sent out sailors across the world's oceans. Rediker says it took 2,000 to 10,000 pounds to finance one voyage, and that "essential to the success of the international merchants were the maritime workers, who created much of the value of the merchants' commodities by transporting them from one market to another."<sup>45</sup> The difficulties involved in this everyday feat pressed the maritime technology of Europe to the breaking point. Often, that technology fell short. Unable to wander freely over the world's oceans for fear of losing their way, the early sailors of the deep sea were restricted to a narrow number of well-known sea lanes that brought friend and foe alike into uncomfortably close quarters. The resulting loss of blood and treasure prompted calls by the international merchants for a government-sponsored solution to their chief problem, the inability to find the longitude at sea.

The hero of that quest, John Harrison was often his own worst enemy. This is not to say he had no real adversaries, as his encounters with Nevil Maskelyne and his petty treatment by figures of the scientific establishment demonstrate. But in spite of this, Harrison displayed indomitable perseverance in the face of adversity that would have broken most others.

In the anti-climax that followed his bittersweet victory over the Board of Longitude, other clock makers took up the job of perfecting Harrison's discovery. Kendall, Mudge, Arnold, and especially

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<sup>40</sup> Sobel, *Longitude*, p. 140.

<sup>41</sup> Howse, *Greenwich Time*, p. 71.

<sup>42</sup> G. M. Badger, *Captain Cook* (New York: Humanities Press; London: Hurst and Company, 1969), p. 69.

<sup>43</sup> Howse, *Greenwich Time*, 72; Sobel, *Longitude*, p. 147.

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<sup>44</sup> Howse, *Greenwich Time*, p. 72.

<sup>45</sup> Marcus Rediker, *Between the Devil and the Deep Blue Sea* (Cambridge: Cambridge University Press, 1987), p. 74.



Earnshaw, with his mass production techniques, would create the timepieces that laid the groundwork for the modern chronometer. Today, chronometers are standard equipment aboard all sea vessels. They are as ubiquitous and unnoticed as light bulbs. Ironic as it may seem, none of today's chronometers owe anything to John Harrison. His designs, from H-1 to H-5, solved the engineering problems associated with building an accurate sea clock, but were too complex to be mass produced. This spelled their doom at the hands of Harrison's successors, who found simpler solutions to the same problems in the years that followed. It is their machines from which all modern chronometers are descended. Harrison's true legacy is not in modern chronometers at all. By his success, his great contribution was in breaking the emotional barriers to the possibilities of mechanical innovation. John Harrison proved it could be done.

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**WOMEN'S REACTIONS TO *THE FEMININE MYSTIQUE*: REVOLUTION OR REJECTION?**

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**Sue Stewart**

In compiling this research and seeing the ups and downs of the women's movement, the same question keeps running through my mind. How far have women really come since 1963 and the publication of Betty Friedan's *The Feminine Mystique*? I am in my early 40s and feel like I was trapped in the mystique. I married at 20, quit college for my man, and could not wait to start a family. It did not turn out well, and by age of 25 I was back in school and getting on with my destined life plan. I cannot say I felt pressure to marry, but I know my environment was stating it implicitly if not explicitly.

Like many baby boomers, television affected my life and shaped my perceived role as a woman. I remember watching *Bewitched* as a nine year-old. Samantha Stephens was the ultimate suburban housewife—and a witch. She was gorgeous, her home was gorgeous, and her kids were gorgeous. I knew I had no magic powers, but I dreamed of living on Morning Glory Circle with a Darrin of my own—sans the oily hair and his temper tantrums. I believe that television did shape my expectations of life as a wife and mother. Guilt set in when I could not keep my marriage together like the wives on television.

Many of my friends today have similar feelings as those women interviewed by Friedan in 1963. They are Moms who carry massive guilt when they fail to live up to superwoman status. Most of the husbands are more enlightened than those

thirty years ago, but not many participate equally in housework or care of the children. When I ask why my friends do not demand assistance, they often remark, "He knows I'll do it. I'm the Mom. It's my responsibility."

Having reproductive organs seems a possible connection. Having babies, or having the potential to have babies, makes us the "mother." For most women, mother or not, that also infers responsibility for the home. That is what little girls and boys are brought up to believe, so it must be true. Peel away another layer and there are mothers who disdain childless women and vice versa. Before women can unite, they have to accept that Mommys and non-Mommys are just women who made choices. I guess we all have to keep on pursuing our life plans and give women and their choices the respect they deserve.

I had never read *The Feminine Mystique*, and most of my friends said they had heard of it but had never read it either. I regret not reading Friedan's book and missing the opportunity to participate in the women's movement—especially during the 1970s. This research is somewhat like a penance for missing the chance to support my sex. It certainly is not too late to get involved and change things. There is much work to be done.

In 1963 Betty Friedan wrote a book about female stereotypes and gender inequality that should have galvanized women into one fighting unit; it did not. Thomas Paine wrote in *Common Sense*: "We have it in our power to begin the world over again."<sup>1</sup> Friedan wrote *The Feminine Mystique* with the same idea in mind. While Paine's words countenanced a revolution with muskets and powder, Friedan beckoned women to a non-violent revolution—one

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<sup>1</sup> Quoted in Paul S. Boyer, *The Enduring Vision: A History of the American People* (Lexington, MA: D.C. Heath and Company, 1993), p. 164.

that demanded equality between the genders and a stop to sex-role stereotypes. Both publications were filled with “fighting words.” Here was the difference. Paine saw his revolution; it remains to be seen if Friedan saw hers.

Most women refused to back Friedan and her book. She was scorned by her own sex. When reading the words of these women, their defensiveness and rage were clearly evident. They were stirred up, but for the wrong cause. Instead of fighting for their equality, women were clinging to their brooms, babies, and the P.T.A. The magazines, television, and advertisements from the period make clear that Friedan was one small voice in the wilderness shouting to be heard above the images of women as perfect wives, housekeepers, and mothers. Undeniable changes occurred as a result of *The Feminine Mystique*, but many of the questions Friedan posed in 1963 still go unanswered today.

Betty Friedan was a college graduate who resided in a New York suburb taking care of her family. As a sideline, she wrote articles in magazines like *Ladies' Home Journal* and *McCall's*. The content was often about the joys and responsibilities of being a mother. To most, it seemed Friedan had the best of both worlds—a career that did not interfere with her wifely duties. Friedan, however, felt unhappy, exhausted, and unfulfilled. What was this problem with no name that made her feel so guilty?

Friedan conducted a survey in 1957 of women who had graduated 15 years earlier from her alma mater, Smith College. The survey's purpose was to determine if education assisted women in their post-graduate roles. If it did not, was it the fault of education or the roles? The questions were open-ended and quite intimate. The majority of respondents voiced the same feelings Friedan was experiencing. Disclosing the survey results proved futile;

there were no takers. Editors of women's magazines (predominantly male) felt Friedan was off-base. Their readers *were* happy. This story was downbeat; no one would want to read it.<sup>2</sup>

Friedan continued her research doing eighty interviews with women in differing life cycles. She gathered information from the fields of medicine, psychology, and sociology. She analyzed census information, along with Madison Avenue's take on the American woman as a consumer. The result of this journey became clear. Women were trapped in what Friedan called the feminine mystique—the gap between the reality and the images that society created, nurtured, and promoted for women. The problem now had a name.<sup>3</sup>

Friedan knew her findings must take the form of a book. No other avenue was open to her. *The Feminine Mystique* described this malady from which she and so many women suffered:

There was a strange discrepancy between the reality of our lives as women and the image to which we were trying to conform, the image that I came to call the feminine mystique.<sup>4</sup>

By the end of the 1950s, the average age of marriage for women was 20 and dropping into the teens. High schools added courses on marriage and some employed marriage counselors. Fourteen million girls were engaged by seventeen. The proportion of women attending college in comparison to men dropped 35 percent in 1958. By the mid-fifties, 60 percent of female college students dropped out of college to marry. The United States' birthrates overtook

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<sup>2</sup> Betty Friedan, *The Feminine Mystique* (New York: W. W. Norton & Company, Inc., 1963), pp. 5, 11.

<sup>3</sup> *Ibid.*, p. 5.

<sup>4</sup> *Ibid.*, p. 11.

India's by the end of the 1950s, with most babies being born to college women.<sup>5</sup>

Friedan wrote of these women who made the mass exodus into the suburbs to the nursery and kitchen. They said the same things over and over: "I feel empty somehow . . . incomplete . . . I don't feel I exist." A doctor in Cleveland called it the "Housewife's Syndrome," often hearing women say they had ". . . a tired feeling . . . I get so angry with the children it scares me. . . I feel like crying without any reason."<sup>6</sup> Other doctors called it "Housewife's Blight," where some women displayed bleeding blisters. Friedan interviewed a mother of four who left college at 19 to get married. Her testimony summed up what many women were feeling:

I've tried everything women are supposed to do—hobbies, gardening, pickling, canning, being very social with my neighbors, joining committees, running PTA teas. I can do it all, and I like it, but it doesn't leave you anything to think about—any feeling of who you are. I never had any career ambitions. All I wanted was to get married and have four children. I love the kids and Bob and my home. There's no problem you can even put a name to. But I'm desperate. I begin to feel I have no personality. I'm a server of food and a putter-on of pants and a bedmaker, somebody who can be called on when you want something. But who am I?<sup>7</sup>

Previous to Friedan's book, the media either ignored or handled the issue lightly. A 1960 *Time* cover story was on the suburban wife. *Time* described her as an

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<sup>5</sup> Ibid., pp. 16-17.

<sup>6</sup> Ibid., p. 20.

<sup>7</sup> Ibid., p. 21.

American phenomenon with wives "having too good a time . . . to believe they should be unhappy."<sup>8</sup> Other publications dismissed the problem or offered tongue-in-cheek solutions such as the one by a humorist in the July, 1960 *Harper's Bazaar*:

In the pre-19<sup>th</sup> Amendment era, the American woman was placid, sheltered and sure of her role in American society. She left all the political decisions to her husband and he, in turn, left all the family decisions to her. Today a woman has to make both the family *and* the political decisions, and it's too much for her.<sup>9</sup>

Friedan took the issue seriously and had a plan—a revolutionary plan to cure the feminine mystique. According to Friedan, women must say no to the housewife image and see housework not as a career but as something that needed to be done quickly and efficiently. Marriage was not a union made on gossamer wings but an equal partnership. And every woman must have a life plan with a job that matched her capabilities. Fulfillment would come through meaningful, creative work. Getting paid constituted work to Friedan. There should be a way to assign a dollar value to work inside the home as well as outside, Friedan argued. The government must get involved and develop a G.I. bill for women who needed to be educated and trained as part of their life plan. Friedan suggested that women unite in the mold of the current civil rights movement. Indeed, these were fighting words evolving into what Paine promised in 1776: "We have it in our power to begin the world over again."<sup>10</sup>

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<sup>8</sup> Ibid., p. 22.

<sup>9</sup> Ibid., p. 23.

<sup>10</sup> Quoted in Boyer, p. 164.

Friedan did not know what to expect when her book hit the bookstores. Would it be revolution or resignation to the past? During 1963, Friedan signed many books to promote *The Feminine Mystique*. She always inscribed each book the same way, writing, "Courage to us all on the new road."<sup>11</sup> It was time to go down the road and see what was ahead.

From a literary standpoint, *The Feminine Mystique* received mixed reviews. Maurice Richardson, critic for the *New Statesman*, wrote, "Betty Friedan is a competent writer . . . A disturbing and challenging book for all libraries." *The New York Herald Tribune* critic, Marya Mannes, reaffirmed Friedan's call to action: "In her last chapter Mrs. Friedan charts a course for women in search of themselves. This reviewer found her suggestions not only sensible but mandatory if women were ever to clear away the mists of the feminine mystique and learn to use their full capacities as human beings." Lillian Smith of *Saturday Review* liked what she read: "Written with a passionate drive, it is worthy of respectful reading, and it will leave you with some haunting facts as well as a few hair-raising stories. *The Feminine Mystique* is at the same time a scholarly work, appropriate for serious study, only adding to its 'usefulness'."

Not all reviewers took Friedan's book at face value. Lucy Freeman of the *New York Times* had some concerns:

Highly readable, provocative book... Sweeping generalities in which this book necessarily abounds may hold a certain amount of truth but often obscures the deeper issues. It is superficial to blame "culture" and its handmaidens, the women's magazines, as she does. To paraphrase a famous line "The fault,

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<sup>11</sup> Friedan, *Feminine Mystique*, p. 9.

dear Mrs. Friedan, is not in our culture, but in ourselves."<sup>12</sup>

The *Yale Review* also dismissed the dramatic implications of *The Feminine Mystique*:

It is a pity that Mrs. Friedan has to fight so hard to persuade herself as well as her readers of her argument... Her "New Life Plan for Women" is not particularly revolutionary—it is being acted upon by many women.<sup>13</sup>

Was the *Yale Review* right? Were women already acting upon their own life plan?

*Life* magazine interviewed Friedan for its November 1, 1963 issue. She gave a frank commentary on her beliefs:

Don't be an appliance, a vegetable on a service station. How will you get your man? If you find yourself first you won't need any trickery. He'll find you, and he'll have plenty of competition . . . I don't find name tapes and car pools all that great. I don't live through my kids . . . Some people think I'm saying, "Women of the world unite—you have nothing to lose but your men." It's not true. You have nothing to lose but your vacuum cleaners.<sup>14</sup>

Under the title "You're a Freak if You Have a Brain," Friedan listed eighteen key points from her book. The November 22, 1963 issue of *Life* printed letters to the editors concerning the article. Six letters were chosen for publication. The editors did not

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<sup>12</sup> Dorothy P. Davison, *Book Review Digest 1963* (New York: The H. W. Wilson Company, 1963), p. 355.

<sup>13</sup> Ibid.

<sup>14</sup> "Angry Battler for Her Sex," *Life*, November 11, 1963, pp 84-85, 87.

reveal how many were received, but six seems a small number—certainly not a revolutionary response one way or the other. One letter from a man was probably typical of his sex: “The hand that rocks the cradle still rules the world and woman’s place is still in the home. Tell Mrs. Friedan to go peddle her ‘feminine mystique’ wares elsewhere.” Of the remaining five female responses, one opposed Friedan and the rest seemed to make light of it all. Signing with her married name, Mrs. C. W. Elkington wrote, “I, too, find housework boring, but I prefer it to having another woman substitute for me as a mother to my children. . . . Granted, we (women) need other interests, but we can have them without abdicating from our most important job.”

Judith Foley twisted her agreement with Friedan while still bearing allegiance to hubby: “Women have changed not because they want to, but this is what the man of the house wants. They want some action and have been screaming for it and by God they now have it. In the form of Mrs. Friedan. Good for her.” Persis M. Lane said, “. . . where would political campaigns be if there was no one to lick stamps or write addresses? This thought came to me while driving the vacuum cleaner.” Mrs. Earland Sleight challenged Friedan on a minor point: “I agree with Betty Friedan on many things but can’t imagine a den meeting with seven or eight active boys being boring. Boring?” It seemed these women felt they could only state their opinions by making light of the situation. Jessica Mitford wrote: “Cheers for Betty Friedan and her inspired crusade for bad housekeeping.”<sup>15</sup>

The interpretation of the letters is difficult. Were the writers mocking Friedan or voicing their support in the only way they felt acceptable? In 1963, women were not organized nationally, regionally, or locally.

The P.T.A. probably came closest to getting women (and the occasional man) organized and working toward common goals and concerns. Outside the realm of parenting, there was no cohesive bond between women. It was no wonder that women wrote letters defending their roles as housewives. They were hanging onto roles they grew up believing in and knowing were right. Men worked and supported the wife and kids. Women stayed at home and cared for the family. It is not surprising that women subjected Friedan to abuse. She was striking against the very core of their existence. As for the women who seemed to take the issue lightly, it was easier to laugh, ignore, and dismiss the mystique. Taking an honest look at themselves, as described by the soul-searching women interviewed by Friedan, sounded frightening and bleak. It was much easier to pick up the dust rag and give the furniture another shine, get the kids ready for school, and make the cobbler for the P.T.A. meeting. Many women swept the mystique under the rug.

Friedan wrote an article for the January/February, 1963 *Ladies’ Home Journal*—the magazine “women believed in,” or so said the tag line on each issue. “Have American Housewives Traded Brains for Brooms?” recapped *The Feminine Mystique* with quotations from women Friedan had interviewed. Perhaps a thorn among the roses, Friedan’s article shared billing with Dr. Benjamin Spock asking the question, “Should Mothers Work?” Other articles included “Why Husbands Run Away,” “18 Ways on What Makes a Man Masculine,” a look at Paris fashions as well as advice on unforgettable kitchens and how to dine on 300 calories. Dorothy Cameron Disney gave insight to young brides in her article, “Why Husbands Run Away”:

Last year (1962) some 200,000 husbands, nearly 4,000 a week,

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<sup>15</sup> “Letters to the Editor,” *Life*, November 22, 1963, p. 27.

shuffled off their martial ties and walked out . . . Brides are unwilling to get up and cook their husbands' breakfast; they refuse to shop for bargains or to stick to a budget. Husbands are blissfully ignorant . . . and unprepared to make sacrifices to meet the bills. . . As a result, flight from the marriage—it should be remembered that brides also run home to their mothers—becomes a commonplace.<sup>16</sup>

While Ms. Disney pointed out it takes two to cause a marriage to fail, she cited a wife's dereliction of duty as the reason for most break-ups. The guilt begins.

In his article on women working, Dr. Spock said,

Some of the most sophisticated and interesting women I've known have never had a job. And I've met lots of professional people who were dull as dishwater. . . The issues involved in a mother going to work are complex and obscure. They should be discussed with a professional counselor if at all possible before a decision is made. Part-time work may be the most satisfactory compromise. The child has a vital need for a mother or for a loving, reliable substitute, especially in the early years.<sup>17</sup>

It was interesting that Dr. Spock called dishwater dull. So did many women in Friedan's book. It also appeared that women could not make this kind of decision alone or even with their husbands. It

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<sup>16</sup> Dorothy Cameron Disney, "Why Husbands Run Away," *Ladies' Home Journal*, January/February, 1963, p. 94.

<sup>17</sup> Benjamin Spock, "Should Mothers Work?" *Ladies' Home Journal*, January/February, 1963, p. 21.

required "professional" help—perhaps another man's opinion. His last statement linking children into the argument was a cannonball of guilt that most women felt deeply.

Intentionally or unintentionally, the letters to the editor in the same issue showed glimpses of the feminine mystique. Catherine Walsh wrote in response to a previous article on women writing poetry at home, "What housewife would not be content to stick to her knitting if while ironing shirts she could breed such poems and essays as Miss McGinley has mothered? It's a little like Liz Taylor's saying, 'If you will eat an apple a day and walk two miles, you will look like me'." Norma J. True talked about the other end of the spectrum: "Recently a reader wrote that her husband lists her occupation on their tax form as 'homemaker' instead of 'housewife'—a term she despises. In that same little space on our form, my husband lists my occupation as 'none.' Can this marriage be saved?"<sup>18</sup> This was yet another example of humor used to defuse a very emotional issue.

As a final example, Dorothy Markinko wrote an article profiling Doris White, wife of Air Force test pilot Robert White. The author pointed out that the Whites lived in a four-bedroom ranch house, Doris was a size eight, belonged to a women's church group, enjoyed mah-jongg weekly, and played golf—but never with Bob. Doris explained that she had lightened up on the housework: "I used to pick up after them all the time; now I do it just once a day." Bob wanted all three of his kids (one boy and two girls) to finish college. Doris lamented, "It would be nice if the girls finished college, but unless they're really interested, I think some sort of special training after high school, or two years of

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<sup>18</sup> "Our Readers Write Us," *Ladies' Home Journal*, January/February, 1963, p. 9.

junior college would be sufficient.” As one might imagine, Bob was extremely proud of Doris: “She’s the ideal wife for a man in my job. She’s done a darn good job of running the children and the house, and a darn good job on me. She’s accepted everything I’ve had to do.”<sup>19</sup> Women reading about Doris would have looked at her as a role model or home wrecker. The Doris ideal would be nearly impossible to match.

Friedan’s article in the January/February, 1963 issue of *Ladies’ Home Journal* raised more eyebrows than the *Life* article. Under the heading “And The Letters Are Still Coming,” in the March, 1963 *Ladies’ Home Journal*, readers reacted to Friedan and *The Feminine Mystique*. The editors noted that at press time “four out of five of hundreds of readers who’ve written us say that Betty Friedan is wrong.” Jean Fields was one of the minority who agreed with Friedan: “I need to feel that I am an individual, so I thank the *Journal* for printing an article which, for a change, doesn’t glorify the kitchen and woman’s role in it.” That was the only positive letter printed.

On the other hand, Mrs. C. K. McCadams was fed up and said, “So I’m a nut because I am happy and satisfied staying at home being a mother to my children and a wife to my husband? If you ask me, the real nuts in this world are the people who go around saying loudly that such a thing is impossible!” Elsie Schumacher laid it on the line: “I’m an old bag of 37 who’s been looking forward to a husband, children and a home, in that order. I’ll gladly trade my situation for one of those poor, tired, bored housewives who have the world by the tail and don’t know it.” Grace Decker seemed troubled: “The greatest tragedy of housewives is that too many are married to boys instead of to men. With a boy, a

woman is used. With a man, she has many exciting dimensions. The problem is not brooms; it is manhood.” Joyce S. Fienberg was a rationalist:

I’ve learned something: that *there is no answer*, not until your children are old enough to give you breathing room. There’s nothing wrong with admitting that you’re fed up; but for now, I’m the woman my family demands that I be. Later, I’ll seek out the gal who used to answer to my name. I wouldn’t be surprised if she turns out to be warmer and wiser and much more ready for life than she was as a bride.

Joyce was following the prescriptive thought of the day: stay home, raise the kids and then reenter the workforce. Friedan spoke for women who did not wish to wait until middle-age to pursue their life plan, and these women were treated to guilt and recrimination for opposing popular beliefs. The abuse got personal for Friedan as well. Ann Brubaker wrote to ask, “Is Mrs. Friedan still married or divorced?”<sup>20</sup> The tendency to lash out at Friedan personally was frequent. She would later divorce, but in 1963 she was very much married.

The editorial content of *Ladies’ Home Journal* did not change much after Friedan’s appearance in the January/February, 1963 issue. Homemaking was still the focus. The April issue had articles such as “The Hostess Who Makes Everything Look Easy,” “Easter Dinner for Eight,” and a special section on weight control. The September issue profiled Valentina V. Tereshkova, the first woman in space. The *Journal* article “Comely Cosmonaut” described Tereshkova as “. . . a trim five foot seven, neither overly slim nor

<sup>19</sup> Dorothy Markindo, “Sky-High Courage,” *Ladies’ Home Journal*, January/February, 1963, pp. 64, 108.

<sup>20</sup> “Our Readers Write Us,” *Ladies’ Home Journal*, March, 1963, p. 9.



overly plump, retaining all of the seductive curves of an attractive woman.” The *Journal* asked Valentina about a lifetime companion. Her reply sounded like something Friedan might say:

As regards a lifetime companion, many of my cosmonaut friends, including the girls, have families. So why shouldn't I. . . Of course I will have a family and children of my own. That will not interfere in the slightest with my work, my new profession of cosmonaut.

The author was quick to reply: “Whoever Valentina eventually marries will probably be getting a very competent housewife.”<sup>21</sup> Even woman astronauts could not escape the need to fit into the cookie cutter mold of the housewife. Perhaps this article had little impact since it was, after all, a Soviet woman gallivanting into outer space, not an American woman. American women knew where their place was—directly in the home.

To be fair, another article also appeared in the same issue titled “I’m Going to Get a Job!” The author, Betty Hannah Hoffman, gave step-by-step directions for women *over 30* to reenter the job market. The article stated that it was fine for women to join the work force after the children were gone from the nest. It did not discuss working while children were young. The omission itself made a statement: women belong in the home with young children. The *Journal*’s December issue rounded out the year with a special section on the Fischer quintuplets. Mrs. Fischer’s article was entitled: “My Life, My Children.” How many women would have agreed? To say the opposite would put one at risk and lead to questions most women did not want to confront. If women were not mothers, then

<sup>21</sup> Edmund Stevens, “Comely Cosmonaut,” *Ladies’ Home Journal*, September, 1963, pp. 60-61.

what could they be? Friedan was trying to show women a way to be mothers *and* lead a productive life. It frightened most women and certainly put fear into the editors of women’s magazines.

A grateful reader from the June, 1963 issue confirmed the power that women’s magazines had on women:

. . . you helped me stay married with your beef stroganoff recipe . . . have used you for everything from colors for my kitchen to the best-looking dress at a neighborhood party. NOW, thanks to darling Dr. Spock, I know that there are children just as messy as mine. That April *Journal* was no fool!<sup>22</sup>

How wide was the schism between this woman and one who told Betty Friedan, “I seem to sleep so much. I don’t know why I should be so tired. This house isn’t nearly so hard to clean as the cold-water flat we had when I was working. The children are at school all day. It’s not work. I just don’t feel alive.”<sup>23</sup> Women had to look deeply into their souls to admit whether they were happy as homemakers or women without a life plan. Most did not have the courage to do it. They remained silent or wrote letters to their favorite magazines validating themselves and denying the existence of the feminine mystique.

Friedan never seemed to waver—even when criticized harshly. “The Fraud of Femininity” appeared in the March 1963 issue of *McCall’s*. Just as frankly as in the other articles, she referred to the home as “a comfortable concentration camp” and women as “biological robots.” Again, the response to the article was minimal. Letters to the editor in the May, 1963 issue

<sup>22</sup> “Our Readers Write Us,” *Ladies’ Home Journal*, June, 1963, p. 12.

<sup>23</sup> Friedan, *Feminine Mystique*, p. 22.

numbered seven—three pro and four con. Ruth Onanian was relieved: “‘The Fraud of Femininity’ is the most intelligent article I’ve read in any magazine in several years. It deserves more attention and publicity.” Gloria Heck disagreed: “If the article ‘The Fraud of Femininity’ expresses the opinion of most American women, I can readily understand our high divorce rate.” Mrs. R. W. Robinson was succinct: “Hogwash!”<sup>24</sup>

The editorial content of 1963 issues of *McCall’s* was similar to its sister publication, *Ladies’ Home Journal*. There were some interesting stories about the housewife that substantiated Friedan’s claim that women were caught in a maze of preconceived notions of their roles. “Husbands in Crisis” from the August, 1963 *McCall’s* chronicled the heroic Washington wife who did whatever was necessary to keep her politician husband going. Mrs. Virginia Rusk, wife of Dean Rusk, Secretary of State in the Kennedy administration, was the perfect wife during the Cuban Missile Crisis. The article detailed her activities:

His wife, Virginia, rose early to serve breakfast in front of the crackling fire in the living room. She made sure she had plenty of canned apricots, which he loves, and for dinner, when he was home, she serves his favorites, especially salmon croquettes and frogs’ legs. “I rose to the occasion pretty well,” said Mrs. Rusk, “I’m aware that I’m often short-tempered, so I made a special effort.”<sup>25</sup>

Republican women were no slouches as wives either. Barry Goldwater, then a senator, summed up his idea of the perfect wife: “She believes in making evenings at

home as pleasant as possible. Women, he said, should wear long, flowing hostess gowns—none of those bright-colored tight silk pants.” He went on to state that he purchased many of his wife’s clothes. The pressures of Washington, D.C., could be daunting. Goldwater expected “To come home and see a pretty woman in soft clothes.”<sup>26</sup> Why were Virginia Rusk and Mrs. Goldwater chosen as role models for women? At that time there were two female U.S. Senators, eleven State Representatives, and two U.S. ambassadors.<sup>27</sup> Why not find out how they dealt with crisis and life in Washington, D.C.? Undoubtedly, the articles would have concentrated on these women’s clothing and figures. The mystique seemed to be everywhere.

Abigail Van Buren (a.k.a. “Dear Abby”) continued with advice that Friedan would categorize as part of the mystique. The *McCall’s* February, 1963 article “After the Honeymoon” stated, “The routine of the helpmate starts at the altar. It runs through the boudoir, zigs into the kitchen, zags through the nursery, and darts out the door to the P.T.A.” And shame on women who were interested in their husbands’ work:

Well, some women are more interested in their husband’s work than in their own. And the house looks it. Many a man has been ambushed by jealous competitors within his own firm on tips unwittingly supplied by a talkative wife.

Advocating the spheres remain separate, Van Buren did suggest it was the husband’s obligation to take the wife out—almost like the family dog: “. . . he can take her out of

<sup>24</sup> “Pats and Pans,” *McCall’s*, May, 1963, p. 14.

<sup>25</sup> Nancy Dickerson, “Husbands in Crisis,” *McCall’s*, August, 1963, p. 112.

<sup>26</sup> Ibid.

<sup>27</sup> Pauline Tompkins, “Change and Challenge for the Educated Women,” *Saturday Review*, May 18, 1963, p. 70.

her domestic cocoon occasionally.” Perhaps even the dog got more credit than women as Abby stated, “They (wives) have little poise because they’ve had no exposure. They are out of training mentally and emotionally for social experience.”<sup>28</sup> Abby placed the responsibility on husbands to bring their wives out of the home on “approved” occasions. Not even women themselves could judge the proper time to emerge.

The April, 1963 issue of *McCall's* explored “Pregnancy and the Young Husband.” The article had an interesting twist. It scolded pregnant women for mistreating their husbands and abusing their duties as wives: “Pregnancy in a normally healthy young woman is no excuse for slighting housework, for not cooking meals she knows her man likes. . . She can certainly make a genuine effort to keep herself attractive and can resist the temptation to want to be treated like a baby or an invalid or to treat her husband like a bothersome little boy.”<sup>29</sup> The mystique stops for no woman—even in the throes of morning sickness, exhaustion, hemorrhoids, and labor itself. A wife’s duty to her husband was unshakable. Her own fears, pain, and concerns were secondary. When the baby was born, there would be another priority that came before her needs and wants. The nobility associated with thinking of others before oneself was one of the most hypnotic aspects of the mystique.

There were some glimmers of hope within the pages of *McCall's*. The November, 1963 article “Housewives on Campus: I Feel Alive Again!” chronicled wives going back to college, specifically four institutions that had special programs for mature women. Again, the programs were for mothers whose children were

school age or out of the nest. The women interviewed supported Friedan’s claim that finding creative work and having a life plan was a way to combat the mystique. The University of Minnesota had the most intensive project named the Minnesota Plan. Many programs had special classes for wives which essentially segregated them from traditional students. A local church provided a cooperative nursery near campus for thirty-five cents per hour per child. Twelve hundred women flocked to the program. Winifred Morris, thirty-four-year-old mother of four studied for her master’s degree in audiology. She summed up the feelings of most:

When a women gets that useless feeling, she can do one of two things. She can have another baby, or she can join the League of Women Voters. I tried both. For me neither got rid of that useless feeling. . . After I started school, I felt guilty about leaving a little dust in the corner. But the only one who noticed was me. I realized I had done all that cleaning for myself—to make me feel less useless.<sup>30</sup>

The women found that their husbands were proud of them, and their children were starting to take responsibility for themselves by making beds, keeping their rooms tidy, and fixing their own lunches. However, there was still a stigma attached to this new found freedom. Bonnie Nelson, a Minnesota Plan student, commented, “The trouble is women are not really sure that going to school is womanly. A woman knows she’s being womanly if she’s thinking about her home or her community. But if she admits to strong feelings about outside subjects, she feels

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<sup>28</sup> Abigail Van Buren, “After the Honeymoon,” *McCall's*, February, 1963, 177.

<sup>29</sup> David Mace, “Pregnancy and the Young Husband,” *McCall's*, April, 1963, p. 177.

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<sup>30</sup> Bernard Asbell, “Housewives on Campus: ‘I Feel Alive Again!’” *McCall's*, November, 1963, p. 162.

peculiar. She's not being feminine." Anne Bosanko Green was barraged with questions: "What's this old lady of thirty-five doing on campus?" and 'Why are you going back to school? You don't have to work, do you?' and 'Aren't you ever going to be through writing term papers?'"<sup>31</sup> Another student further explained, "I know one woman who keeps reassuring herself, 'My husband feels that my going to school is an insurance policy.' Why does she constantly have to justify it that way? Or you hear someone say, 'I enjoy going to class so much I feel guilty about it.' You hear that so often as a joke that you realize it's not a joke."<sup>32</sup> Going to school for the sake of education was another example of guilt women faced.

"Will Success Spoil Your Marriage?" appeared in the July, 1963 *McCall's*. It described a group called the Young Presidents' Organization. Its purpose, among many things, was providing support to wives whose husbands were young presidents of corporations. These wives were usually left alone to make all the decisions as their husbands traveled extensively. Even when husbands were home, they were working or collapsed with exhaustion. The divorce rates were so high among this group, the organization was formed to reach out to wives. Their advice was to travel with husbands to conventions and other business trips and attend the "Wives Workshop." The workshop was designed to help wives face the reality of their lives. The emphasis was on support of the husband; the wife took care of the home and kids. Helen, a wife and mother of two, was a successful photographer's model in New York before marriage. The article reported, "She would like to resume her

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<sup>31</sup> Anne Bosanko Green, *One Woman's War* (St. Paul, MN: Minnesota Historical Society Press, 1989), p. 308.

<sup>32</sup> Asbell, "Housewives on Campus," p. 164.

glamorous career, but because of her husband's 'image' as a hot-shot tycoon and her own 'image' as an executive helpmate, she doesn't dare. So she has taken to playing the piano and the organ at home alone in the evenings to pass the time."<sup>33</sup> The author referred to the women as living in gilded cages, high on their pedestals. The imagery of pedestals has occurred frequently throughout women's history. Women in 1963 were torn between sitting on top or tearing the pedestal down. It was nice to sit "on high," but the burdens endured to stay there were enormous.

The general press reiterated what women's magazines were saying about women. The January, 1963 issue of *Life* magazine turned to college women and the beauties of Radcliffe. With photos of female students around a typewriter, in the chemistry lab, and surrounded by admiring Harvard men, the article reported the good news:

Cliffies as they are called, were a formidable lot, long on brains but traditionally short on style and looks. Now something great has happened to Clifflie . . . Tossing off her dowdiness and disdain for style, she is a real looker, beautiful as well as brainy.<sup>34</sup>

The combination of brains and beauty was good, but it was evident that beauty really counted with the men.

Those Cliffies had high expectations to meet. In the May 18, 1963 *Saturday Review*, Edward Eddy, Jr., President of Chatham College, pondered, "What's the Use of Educating Women?" His basic premise was that women got more out of education in a women's college. Co-

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<sup>33</sup> Toni Howard, "Will Success Spoil your Marriage?" *McCall's*, July, 1963, p. 89.

<sup>34</sup> "Radcliffe Beauties," *Life*, January, 1963, p. 63.

educational schools were inadequate “considering the nature of a woman . . . the prevailing structure of male education is not sufficient. The male version of higher learning is tied down by the short strings of utility. Vocational education is basically informational. It lacks the sensitive nuance. It is preoccupied with the immediate job.” Women, in Eddy’s opinion, were not interested in career until later in life. It was the job of women’s liberal arts colleges to prepare students not for the day *after* graduation, but the reentry into the job market in their middle years. He argued that American culture and co-educational institutions put women on pedestals where they stayed indefinitely. The women’s college “is about the only place left where a woman can be knocked flat off that pedestal and not want to crawl back.” It was an interesting train of thought; however, it neglected to report on the day-to-day experiences of women in the home from graduation to middle age. The inference was that they were enjoying their status as wives and mothers. Friedan begged to differ. Eddy had argued that an educated woman was useful in opening the mind of her husband:

The educated woman can encourage a man to rise above self, can make community service something more than a hollow status race, can insist on an intelligent approach to foreign aid, desegregation, taxes, and federal aid to the schools and colleges that educate her children.<sup>35</sup>

Friedan did not encounter women who felt they had this kind of political power or influence with their husbands. This was similar to the old argument that women did

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<sup>35</sup> Edward Eddy, Jr., “What’s the Use of Educating Women?” *Saturday Review*, May 18, 1963, pp. 67-68.

not need the vote—they influenced their husband’s vote and therefore had clear representation. Eddy was obviously pitching women’s colleges, but in the process he refuted, or showed his lack of understanding for, the perils of the feminine mystique.

Women were making progress in the academic world. Rosemary Park became the first woman to become a college president twice—at Connecticut College and Barnard College, the female undergraduate division of Columbia University. *Time*’s reporting of the event was spoiled by the article’s headline “There’s Nothing Like a Dame.”<sup>36</sup> The October, 1963 issue of *Time* added insult to injury when reporting on women students at M.I.T. There were 238 females versus 6,860 male students. M.I.T.’s first woman dean was described as “an attractive blonde,” while female students were depicted with “long legs, wind-blown hair, and fresh faces.” Females at M.I.T. professed they were a commodity in hot demand; a freshman reported that the “merest smile” got a woman a date. The article’s parting thoughts dealt with marriage: “. . . about 40 percent of Tech girls marry Techmen—much preferring them to Harvardmen, who are ‘all the same’.”<sup>37</sup> The article glossed over the academic pursuits of these women and insisted on placing their emphasis on dating and marriage.

*McCall*’s September 1963 issue explored sex on college campuses. The author discussed the push for college women to get married. A college president placed partial blame on parents who rush their daughters to get pinned, then married:

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<sup>36</sup> “There’s Nothing Like a Dame,” *Time*, April 26, 1963, p. 48.

<sup>37</sup> “Where the Brains Are,” *Time*, October 18, 1963, p. 52.

Their mothers, don't you forget it, are born matchmakers and constantly needle their girls with such questions as "Whom have you been out with lately?" And their fathers, without quite saying so, may often convey the idea that daughters in graduate school are not only an expense but a disappointment. Such a man wants to be the father of the bride, not of a Ph.D. candidate, and the girl is painfully aware of this.<sup>38</sup>

Friedan reported college dorms being built for married students—with husbands normally being the students. These supportive young women had their own degrees—the Ph.T. (Putting Husband Through)—to earn. Another story involved a bright woman who refused a science fellowship at John Hopkins to work in a real estate office.<sup>39</sup> This vicious cycle of parents willing their children to their own fate was at the very heart of the feminine mystique. How could young women not take the attitude of "if you can't beat them, join them"?

Some college students may have read and pondered Helen Gurley Brown's *Sex and the Single Girl* (published in 1962); it described an alternative lifestyle for women—a swinging single life. *Life* magazine interviewed Brown in the March 1, 1963 issue where she admitted: "For 17 years, I actually had been quite a swinger, and a solid citizen too."<sup>40</sup> Stating that a bachelor of the female persuasion could have just as much fun as the guys, Brown was knowingly or unknowingly liberating women to enjoy being single, a state which included an active sex life. As with Friedan, women criticized Brown's ideas. Women

did not look at Brown's advice as liberating; it was intimidating to most. Reader response in the letters to the editors in the March 22, 1963 issue of *Life* was similar to the responses Friedan had evoked. K. McCormick was offended: ". . . Helen Brown's viewpoint is quite out of line. I am sure that most of our single women merit respect. We all should want to stop this kind of blatant disrespect for proper conduct." Adelaide A. Eiserer was short and to the point: "Publicizing Miss Brown's career is irresponsible journalism." Mrs. E. Birnbyer felt the book ". . . is a classic: it has mordant wit and shows this success of Mrs. Brown as a classic weakness in our whole materialistic viewpoint." And some still clung onto the "right" way for single girls to live: ". . . the single girl, like her married sister, seeks creativity and purpose and she expresses these through various charitable endeavors, etc. Her contribution to society is immeasurable."<sup>41</sup>

The writer did not define these charitable endeavors, but this harked back to the many women interviewed by Friedan. They tried all the ideal ways of keeping busy through charity work though few achieved any lasting feeling of fulfillment. The quotation itself could have been from the turn of the century when the female social worker was looked upon as unusual but condoned. The idea of women making a "contribution to society" has been heard many times throughout American history. Of course, the contributions usually centered around the home and children. Female physicians, scientists, inventors, or even CEOs assisting society were not usually mentioned as acceptable contributions.

Society taught females their roles early in life. Magazines exposed these images to teenage girls. The January, 1963 issue of *Seventeen* was little more than an

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<sup>38</sup> Ashley Montagu, "Has Chastity a Chance at College?" *McCall's*, September, 1963, p. 107.

<sup>39</sup> Friedan, *Feminine Mystique*, pp. 16-18.

<sup>40</sup> "\$40,000 a Word," *Life*, March 1, 1963, p. 60.

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<sup>41</sup> "Letters to the Editors," *Life*, March 22, 1963, p. 20.

instruction manual on how to catch a boyfriend or mate. It almost made the reader pity the boys. One article described the proper way to write a letter to a boy. It referred to the boy as “quarry” and gave an enlightened example of female subterfuge to get her man (or boy in this case):

An example of a *bad* beginning for a letter is: “I’ve just finished studying and decided it was time to write.” That doesn’t make the boy feel nearly important enough. Instead, you might begin: “I’ve got to leave for the movies soon, but it’s such a lovely starry night and it reminds me so much of when we met that I had to write to you.” . . . Being a male, the recipient will probably notice the romance first. Only at the second reading will he spot the carefully planted clause about the movies and begin to wonder exactly *who* was taking you.<sup>42</sup>

There was more trouble brewing for boys when *Seventeen* instructed girls that flirting “can be fun—for everybody. It makes a girl feel more like a girl and a boy more like a man.”<sup>43</sup> One can wonder why a girl could not feel like a woman, but the boy could feel like a man, interesting logic which might by-pass the average teenage girl. The *Seventeen Book of Etiquette* was also excerpted in this issue. Under the category of “Boys, Boys, Boys,” the manual asked: “Suppose my date wants to go to a hockey game and I’d rather see that new movie? Answer: Go to the movie with a girl the next day.”<sup>44</sup> The intent was clear:

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<sup>42</sup> “How to Correspond With a Boy,” *Seventeen*, January, 1963, p. 17.

<sup>43</sup> “How Good a Flirt are You?” *Seventeen*, January, 1963, p. 20.

<sup>44</sup> Enid A. Harpt, “Seventeen Book of Etiquette,” *Seventeen*, January, 1963, p. 137.

make the man’s choice your choice. Many teens would likely carry this credo into their marriages.

Advice in other issues came from columnist Abigail Wood and was even more explicit: “Always let the boy take the lead. Don’t declare your feelings before he’s sure of his . . . listen to everything he says. . . your willingness to compromise (or even concede) occasionally in an argument rather than insist on winning your point at all costs.”<sup>45</sup> Another article, “Are You the New Kind of Girl?” started out with promise but ended deep within the mystique. The author interviewed young teens who were tired of pretending to be something they were not just to catch a boy. It basically described the symptoms of the mystique with high school girls subscribing to “. . . old cliches about how females are supposed to think— cliches that go back to the Bible, and even beyond.” According to the author, surveys verified more than a third of college girls played dumb on dates. Ironically, after revealing the dangers of this type of behavior, the author concluded by actively supporting standards which were impossible for teens to meet:

Modern man wants his wife to be not just his housekeeper and mother to his children, but also his playmate, his companion, his mistress, his best friend, his wisest advisor. Sometimes, too, he wants her to be weak and frail . . . other times he wants her to be strong, clever, and confident . . . In short, he wants her to be all things to him—a large order, but one with a great potential for happiness.<sup>46</sup>

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<sup>45</sup> Abigail Wood, “Young Living,” *Seventeen*, August, 1963, p. 216.

<sup>46</sup> Morton Hunt, “Are You the New Kind of Girl?” *Seventeen*, October, 1963, pp. 164, 166.

Perhaps only a teenage girl would read this article and feel it could be done. Wives found it difficult, to say the least. So it appeared that the allure of the mystique was unavoidable for college and teenage women. Even small children were indoctrinated. Friedan referred to an ad she saw in a 1960 *New York Times* selling the benefits of a child's dress. The headline read "She Too Can Join the Man-Trap Set."<sup>47</sup> It was becoming clear that shaking off the mystique would be difficult.

Advertising targeted women of all ages—particularly the 1960s housewife. In 1958, Janet L. Wolff wrote *What Makes Women Buy*, which suggested advertisers take direct aim at an ignored target: the homemaker whose previous image was a dull, unhappy woman. Women represented millions of consumers who were looking for products to make them feel like useful, youthful wives and mothers. Wolff was blunt when telling advertisers that wives had a need to buy happiness. The products made big promises: ". . . buy our soap and look young, buy our cereal and make your children into Olympic athletes, buy our vacuum cleaner and never do housework again."<sup>48</sup> It sounded irresistible.

Friedan highlighted the "Sexual Sell" where advertising reached into a woman's sexual fantasies and the need to be eternally young. Hair color became a tool to stay young and advertisements made big promises: "Does she . . . or doesn't she? She's as full of fun as her kids—and just as fresh looking! . . . as though she's found the secret to making time stand still." The advertising worked. At that time, three of ten women dyed their hair blonde.<sup>49</sup>

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<sup>47</sup> Friedan, *Feminine Mystique*, p. 16.

<sup>48</sup> Annegret S. Ogden, *The Great American Housewife* (Westport, CT: Greenwood Press, 1986), pp. 184-86.

<sup>49</sup> Friedan, *Feminine Mystique*, p. 17.

The standard was established and women who cared about themselves, their husbands, and children fell into line and spent big bucks in the process. Manipulation, as described by Friedan, not only targeted adult women but little girls as well. The fur industry surveyed high school and college girls in the late 1950s. To their surprise, these women equated furs with "uselessness" or "a kept women." Furriers began a campaign to change those perceptions in young girls. Advertisements showing girls proudly trying on Mommy's mink coat told women that furs were their legacy to a daughter and placed an image in the child's mind that fur coats were the ultimate feminine accessory.<sup>50</sup> Friedan accused marketers of keeping women in the home, having babies, and spending money on products they did not need. Marketers are still selling the same wares today.

Television was another image-producing force to be reckoned with. The top rated shows for 1964-1965 were *Bonanza*, *Bewitched*, *Gomer Pyle*, *Andy Griffith*, *The Fugitive*, *Red Skelton*, *Dick Van Dyke*, and *The Lucy Show*. Women were practically non-existent among the widowers and single men like the Cartwright boys.<sup>51</sup> Friedan saw women on television as the "stupid, unattractive, insecure little household drudge who spends her martyred, mindless, boring days dreaming of love—and plotting nasty revenge on her husband." She suggested that Americans liked shows such as *Bonanza* because Pa, Adam, Hoss, and Little Joe were "beefcake" images that women enjoyed watching and men sought to emulate.<sup>52</sup>

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<sup>50</sup> *Ibid.*, pp. 221, 229.

<sup>51</sup> Richard Layman, *American Decade: 1960 - 1969* (New York: Gale Research, Inc., 1995), p. 330.

<sup>52</sup> Betty Friedan, *It Changed My Life* (New York: Random House, 1974), p. 48.



One might wonder how Friedan could have viewed Mary Tyler Moore and Elizabeth Montgomery as drudges, but some of her criticism of the *Dick Van Dyke Show* and *Bewitched* rings true. Laura Petrie, Mary Tyler Moore's character on the *Dick Van Dyke Show*, did bring freedom to women. She was one of the first wives on television to wear pants—form-fitting capri pants to be exact. Moore explained, "I suggested to Carl (Reiner) that when I vacuum the rug, I wear pants. I couldn't imagine putting on a little dress." In the second year of the show, a survey showed that most women wanted Laura to wear dresses, not pants. Mary compromised. Laura wore capri pants during one scene in each show. Was Laura Petrie liberated? Moore thought not: "I wanted to establish her as a woman who had her own point of view and who would fight with her husband—a good fight, if necessary. She wasn't a 'yes' wife, nor did she focus everything on him. But that's about as liberated as Laura Petrie was. I think she truly believed that her only choice was to be a wife and mother and couldn't combine (that with) a career." One episode dealt with Laura becoming a dancer for one week. Rob feared she would leave home, husband, and son. The episode ended with an exhausted Laura who could not wait to get back to being just Robert Petrie's wife. Laura as a character was very close to the description from the *Seventeen* magazine article. She was everything to her man and beautiful too, another impossible standard.<sup>53</sup>

Samantha on *Bewitched* was an interesting character. She had the power to twitch her nose and anything—including housework—could be done by magic. However, Samantha wanted nothing more than to be a normal suburban housewife and mother. Andrea Press interviewed many women during the mid-1980s for her book

*Women Watching Television*. These women were in their formative years during 1963-1964. *Bewitched* received multiple reactions from the interviewees. Betty admired Samantha: "I like *Bewitched* a lot. I remember my mother always saying how well she portrayed a housewife. I always wanted that sort of domestic life." Some did not care for Darrin, the husband who demanded Samantha give up witchcraft. Nadine was blunt: ". . . he was such an asshole. He was too dominant and she wanted to be a housewife, and that was so unbelievable." Sarah also criticized Samantha's life with Darrin: ". . . she was too married to Darrin. And Darrin was kind of a jerk. I would not want to be married to him. Because he never really treated her very well. He never appreciated her as much as I think she deserved." Janice cut to the chase: ". . . anybody in their right mind if they could twitch their nose and clean their house would do so. I hate housework. To think that anybody would actually want to do it."<sup>54</sup> Few models of career women could be found on television at the time—unless the premise was working at a job in order to find a husband, get married, and then become a housewife with kids. Television Moms might refer to life before marriage, but few plots revolved around the joys of being a single, independent woman.

Movies in 1963 portrayed an eclectic mix of women. It was a bland year for women characters—with the exception of Elizabeth Taylor's *real* life—rather than reel life. Taylor was *Cleopatra* and the object of scorn in real life as she left her husband Eddie Fisher for Richard Burton. Liz's life probably seemed unreal to most women. It was easy to ridicule the most beautiful woman in world. Tippi Hedren got pecked to death in Alfred Hitchcock's *The Birds*

<sup>53</sup> Ginny Weissman, *The Dick Van Dyke Show* (New York: St. Martin's Press, 1983), pp. 40, 45.

<sup>54</sup> Andrea Press, *Women Watching Television* (Philadelphia: University of Pennsylvania Press, 1991), pp. 102-104.

and Sidney Poitier sang “Amen” to a bunch of nuns in *Lilies in the Field*. *Tom Jones* won the Academy Award for Best Picture with Albert Finney slithering his way up the skirts of unsavory women only to end up with his virginal, patient lady love. Man saved woman from pecking birds, man built women a church, and man bedded bad girls then wedded good girls. The lesson? Men protected good, beautiful women and did not marry bad (even if beautiful) women.<sup>55</sup>

In popular music, girls sang about the guys. The Angels told a tale of revenge in “My Boyfriend’s Back,” the Chiffons sang about their man in “He’s So Fine” and “One Fine Day” as did the Crystals with “Then He Kissed Me.” Leslie Gore cried because “It’s My Party.” Guys like Bobby Vinton loved his woman in “Blue Velvet,” while the Beach Boys were “Surfin USA” and made the California girl immortal. Music was filled with love requited and unrequited. It all sounded pretty wonderful if not exciting. And a girl could count on her man to protect her reputation when another guy spread lies in songs like “My Boyfriend’s Back.” The listener got the idea that these girls immortalized in song were those nice, beautiful girls seen in the movies. That is what attracted the boys—nice, beautiful girls ready to wed and be a housewife and mother.<sup>56</sup>

It was not surprising that Friedan and *The Feminine Mystique* met opposition in 1963. A 1962 Gallop Poll verified that 96 percent of women said that being a housewife made them happy.<sup>57</sup> Most believed that fulfillment was marriage; if a woman was unhappy, she had a baby. It would take many years to shake the clutches of the mystique, a frustrating but true fact.

Five years after the publication of *The Feminine Mystique*, Friedan and her

followers did make progress. In 1966 women formed the National Organization for Women (NOW) with Friedan as its first president. The organization focused on legal reforms in divorce, abortion, rape, and equal pay/equal work cases. Daycare centers were another priority. Friedan’s vision for NOW was similar to that of the National Association for the Advancement of Colored People (NAACP). She wanted to emulate the success of the civil rights movement. NOW cheered Title VII of the Civil Rights Act which protected women against discrimination. The Equal Employment Opportunity Commission (EEOC) enforced Title VII, but refused to act on behalf of women until the late 1970s.

The women’s movement gained most of its strength through grassroots activities across the country. Called “consciousness-raising” groups, women met and discussed their situations. Remedies and actions were limited, but women were finding a single, united voice. World events most likely overshadowed the women’s movement as well. Viet Nam was given a higher priority in most American’s minds, much like World War I usurped the suffragist movement in the early 1900s. In the case of Viet Nam, student protests got the headlines. However, one activity during the women’s movement did make headlines. The 1968 Miss America Pageant brought one hundred women protesters to Atlantic City. They burned their bras, girdles, spike heels, and women’s magazines. One lucky sheep was crowned Miss America. The women were arrested, but they got headlines, attention, and basically had fun proving their point that women should be valued for more than their appearance in a swimsuit.

By 1973, ten years had passed since the publication of *The Feminine Mystique*. Historians often look upon the 1970s as the heyday of the women’s movement. There

<sup>55</sup> Layman, *American Decades 1960-1969*, p. 320.

<sup>56</sup> *Ibid.*, p. 325.

<sup>57</sup> *Ibid.*, p. 331.

was also a backlash against the movement by women. The Equal Rights Amendment (ERA) passed Congress but failed to get thirty states to ratify it. Women's groups formed against the ERA. Phyllis Schlafly and her organization, STOP ERA, feared the legislation would give the government power to intervene in American family life. She and her organization convinced states that the federal government was attempting to take their power away. Schlafly and STOP ERA were successful. By 1982 ERA was a dead issue. STOP ERA was one of several women's groups that created a backlash. Women Who Want To Be Women (WWWW) and Happiness of Womanhood (HOW) were other women's groups that formed ranks and fought against the movement.

A book appeared in 1973 whose message was the direct opposite of *The Feminine Mystique*. Marabel Morgan, a former beauty queen, housewife, and mother, wrote *The Total Woman*. She espoused the "four A's." Women should "accept, admire, adapt (to), and appreciate" their husbands. She promised to put the sizzle back into marriage with tips on making a husband appreciate his wife: "Be pleasant to look at, be with, and talk to. Walk your husband to the car each morning and wave until he's out of sight." She advised on how to have super sex: "Once this week call him at work an hour before quitting time, to say, 'I wanted you to know that I just crave your body' . . . then take your bubble bath shortly before he comes home." Above all, the husband was omnipotent: "Adapt to his way of life. Accept his friends, food, and life-style as your own." What was the frightening reality behind Morgan and *The Total Woman*? It was one of the best selling nonfiction books of the mid-1970s. *Total Woman* seminars

enrolled tens of thousands.<sup>58</sup> How could this book strike such a chord? It was apparent women still wanted to stay within the clutches of the mystique.

In spite of STOP ERA, WWW, HOW, and even Marabel Morgan, significant progress occurred for the women's movement. The EEOC filed 147 suits for women in 1973, and *Roe vs. Wade* gave women greater reproductive choice. Turnabout was fair play for Hugh Hefner—*Playgirl* was launched in 1973; *Ms. Magazine* was only a year old. Billy Jean King beat Bobby Riggs in straight sets and the grassroots organizations were even stronger as women established health clinics, rape crisis centers, battered women's shelters, and promoted women's studies as legitimate course work in college.

The January, 1973 issue of *Redbook* magazine invited readers to articulate how it felt to be a woman—specifically in relation to the influence of the women's liberation movement. Calling the column "To Be a Woman," they chose authors from over 2,000 submissions. Five issues carried the column. Two women were in the movement's camp, two opposed, and one was a stand-off. Kay Scanlan titled her column "Let the Revolution Begin!" She felt that "bad vibes" concerning women were not due to damage done by the women's movement but unlikely sources such as the public library, the neighborhood bank, and Dear Abby. While applying for a joint checking account, the banker asked for Scanlan's occupation. She explained she was a temporary housewife until she found a nursing job. The banker assured her, "Oh, your job doesn't really matter anyway. It's your husband's job that counts. We'll just put 'at home' for you." The library gave her the same treatment when she applied for a card. Scanlan described her angriest

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<sup>58</sup> Marabel Morgan, *The Total Woman* (New York: Fleming H. Revell Co., 1973), pp. 100-103.

moment when reading a Dear Ann or Abby column that said men should bathe daily while women should bathe “as frequently as possible.” Scanlan took this to mean women were dirtier than men. As a nurse, she saw many women with inflammations due to overuse of vaginal sprays or douches. Scanlan feared this feeling of dirtiness would be followed with low self-esteem and feelings of inferiority to men.<sup>59</sup> This standard of personal cleanliness coincided with the high standards women set for themselves in keeping the home spotless, the meals most nutritious, and the family laundry the brightest: impossible standards that supposedly measure a woman’s worth.

Joan Kuffer wrote her column for the June, 1973 *Redbook*. She found herself and the neighborhood wives suffering from what she called “housewife syndrome.” She was coaxed into thinking of leaving her husband. After her struggles, she began a life plan similar to Friedan’s recommendation, and made another decision:

A woman should be able to have a sustaining relationship with a man and still retain her own identity. When I came to that conclusion, I applied to Rutgers. Now at the age of 24, I am a whole person. I am a married woman and the mother of a three-year-old son. But I am also a student who wants to complete college and then find a meaningful job for herself.<sup>60</sup>

Joan validated the joy Friedan promised once a woman found her life plan. There was a way to be a wife, mother, and whatever else she wanted to be.

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<sup>59</sup> Kay Scanlan, “Let the Revolution Begin!” *Redbook*, May, 1973, pp. 72, 76.

<sup>60</sup> Joan Kuffer, “How I Became the Person I Want to Be,” *Redbook*, June, 1973, p. 40.

The dichotomy Friedan saw between those who accepted her ideas and those who clung to their housewife roles surfaced in the *Redbook* columns. The remaining three women, ten years after the publication of *The Feminine Mystique*, could have been speaking the same words heard in 1963. Patricia Kroken earned her teaching degree and was supported in these efforts by her husband. After graduation, however, she found she longed to stay home:

After graduation I turned eagerly to a new job—that of housewife. And my world expanded before me as I grabbed at opportunities my schooling had forced me to neglect for years. I joined a service club and a children’s theatre board, took part in two plays, instructed a group of majorettes, began sewing most of our clothing, joined the city band and read insatiably.<sup>61</sup>

Sharon Liedel had a similar experience. She went to work since her older kids were in school and the two-year-old was cared for by her sister. Sharon found work was not satisfying and did not like the way men treated her: “Men take you off a pedestal quite a bit when they’re working with you.” Sharon finally went back into the home for many reasons, but mostly because she was greeted after work by her son who said, “Miss Mama, miss Mama!” She felt guilty for not enjoying work and for leaving her son. Sharon’s advice was to stay home. She looked at it as “a privilege, never a punishment.”<sup>62</sup> Women looking at their jobs as an extension of their roles of wives, mothers, and friends would be disappointed.

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<sup>61</sup> Patricia Kroken, “I’m a Housewife—And I Have the Right to be Proud,” *Redbook*, July, 1973, p. 38.

<sup>62</sup> Sharon Liedel, “This Women’s Place is in the Home,” *Redbook*, August, 1973, p. 29.

Children seemed to be the linchpin for most women's guilt. Christine Blackburn feared that the women's movement was advocating substitutes for the nurturing love of a mother: "But do not dear liberated spokeswomen, encourage anyone to bear children only to dump them in order to pursue a career. Instead, tell us how to make the choice that's best for us." Christine not only wanted women like Gloria Steinem and Germanine Greer to change laws, but to counsel women on how to pursue a life plan without feeling the guilt. Unfortunately, no one could do this for women. They had to do it for themselves.<sup>63</sup>

Why did the women's movement fail to become a revolution or at the very least experience the success of the civil rights movement which occurred during the same period? African Americans had their own "mystique" to unite against. Fighting negative images of their race was critical to their pursuit of equality. Friedan's stories about unhappy women seemed to pale against the injustices endured by African Americans. Proclaiming liberation for women did not mean being beaten, being told to go the back of the bus, or suffering attacks by police dogs. However, in ways that were mentally damaging, it meant denying a woman's upbringing, questioning her femininity, and appearing selfish to your spouse, children, and the outside world. The mental anguish was no less painful than the civil rights experience for African Americans. Still, the women's cause seemed less justified, less serious.

On the surface, women seemed to have choices. They did not have to marry; no one forced them to have children. Jobs were available to women, and they could choose to live where they pleased. Perhaps women looked around and wondered what

they had to complain about. Certainly American families and culture were taking advantage of their vulnerability and pushing women to keep in step with prescribed women's roles. The pressures were strong as they still are for women in the 1990s. An anonymous reader of *Ms. Magazine* in 1972 wrote a letter that could have been written today:

What type of man would accept the totally liberated woman? I am sure the answer is one who has complete confidence in himself and sees a woman as no ego threat. What percentage of men are like this? If a woman totally liberates herself, can she remain married? Will there be someone left to marry her with such liberation? . . . I still have to go along with the opinion (though it may be a learned, stereo-typed role) that a woman desires to be a wife and a mother and teacher to her own children. This is truly where the conflict lies—how to be a wife and mother and retain a semblance of liberation. Can you have true liberation with motherhood, marriage, and the corporate state? Or must they all see their demise?<sup>64</sup>

Motherhood, marriage, and the corporate state have all survived, and the feminine mystique is still with us today. There have been changes that should make all women—especially those trail blazing women of the 1960s and 1970s—proud. And changes will continue from one generation to the next. What is the best advice for women now and in the future? Friedan said it all in 1963: "Courage to us all on the new road."<sup>65</sup>

<sup>63</sup> Christine Blackburn, "I Like Watching Things Grow—Especially Me," *Redbook*, September, 1973, p. 22.

<sup>64</sup> Mary Thom, *Letters to Ms. 1972-1987* (New York: Henry Holt and Company, 1987), p. 25.

<sup>65</sup> Friedan, *Feminine Mystique*, p. 9.

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## AMERICAN INTERVENTION IN THE RUSSIAN CIVIL WAR

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**Michelle Wharton**

President Woodrow Wilson decided in July, 1918, on a limited military intervention into the remnants of the Russian Empire following the Bolshevik overthrow of the Kerensky government. What made Wilson decide to commit troops in an internal civil war of a former ally at the height of World War I? Was the reason to open up the eastern front following the Bolshevik withdrawal from the war in 1918 and to relieve pressure on the Allies? To prevent German domination of the former Russian empire? To overthrow the Bolshevik government? As a rescue mission to save Czech prisoners of war fighting their way back to the western front? To protect allied military supplies stockpiled at Archangel and Vladivostok? Or to prevent Japan from controlling eastern Siberia and the maritime provinces?

I contend that American intervention must be separated into two areas of activity—northern Russia at the port of Archangel and Siberia, starting at the port of Vladivostok and stretching along the Russian railway system. Secretary of State Robert Lansing stated in a communication to British Prime Minister Balfour that intervention presented two different phases "which should not be confused or discussed together."<sup>1</sup> I maintain that smaller American intervention in northern Russia was one of actual military value to stem further German penetration into Russia. I also contend that

the Siberian intervention was forced by the imperialistic ambitions of Japan to gain ownership of the Chinese Eastern Railway, which stretched along the border of Siberia and China, and to attempt to dominate eastern Siberia, Manchuria, and the maritime provinces.

The first section of the paper will discuss the varied interpretations postulated by historians regarding this question. The second section will concern the accounts presented by the *New York Times*, which is my primary source material. I will compare my research on the historiography to the primary source accounts, stating my conclusions and refutations of the evidence. I will attempt in the conclusion to place my results in the broader picture of Wilsonian diplomacy.

There are wide variations of interpretations as to why America intervened in the Russian Civil war. The position that Wilson based his decision upon pressure from France and Great Britain to reopen the eastern front to relieve pressure for the Allies on the western front was first advanced by Eugene P. Trani.<sup>2</sup> This position maintained that Wilson believed that an eastern front could be reestablished with Russian support and that Wilson bowed under intense diplomatic and international pressure to intervene. Historians subscribing to this point of view, in my opinion, take the primary evidence at face value. Diplomatic correspondence, newspaper accounts, and political speeches are utilized without the benefit of hindsight.

The theory that Wilson was motivated by the concern for the plight of the Czech prisoners was put forth by Russian expert George Kennan.<sup>3</sup> He maintained that the idealistic Wilson was

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<sup>1</sup> Betty Miller Unterberger, *America's Siberian Expedition, 1918-1920* (Durham, NC: Duke University Press, 1956), p. 52.

<sup>2</sup> Carl J. Richard, "The Shadow of a Plan: The Rationale Behind Wilson's 1918 Siberian Intervention," *Historian*, 49 (November, 1986), p. 72.

<sup>3</sup> *Ibid.*, p. 78.

motivated to use the intervention as a rescue mission for Czech troops reported as warding off armed German and Austrian prisoners in Siberia. However, Kennan is biased because he served as a Lansing's unofficial advisor and had urged an overthrow of the Bolshevik government.<sup>4</sup> Kennan theorized the Czech prisoner angle in the 1950's at the beginning of the Cold War to justify America's actions in response to Soviet condemnation of America's intervention in Russian internal affairs during their Civil War.

Anti-Bolshevik motivation for intervention was advanced by William Appleman Williams, who believed that this prejudice guided Wilson's decision-making process.<sup>5</sup> Williams postulated that Wilson believed the Bolshevik and the German menace were one and the same and so the intervention would be a continuation of the war. Williams subscribed to the Marxist school of thought, so it is hardly surprising that his position concentrated on the dichotomy of capitalism versus communism.

Fear of Japanese imperialistic ambitions was advanced by Betty Unterberger and John Albert White in the 1950's.<sup>6</sup> This position contends that the United States consented to the Russian intervention because it believed that it was inevitable that the Japanese would intervene in Siberia and that Japan's imperialist actions would tip the balance of power and threaten the open door economic policy of the United States in Asia. Since the theory originated in the 1950's at the beginning of the cold war, it is conceivable that historians were looking for ways to justify the military intervention.

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<sup>4</sup> David S. Foglesong, *America's Secret War Against Bolshevism* (Chapel Hill: University of North Carolina Press, 1995).

<sup>5</sup> Richard, "Shadow of a Plan," p. 74.

<sup>6</sup> *Ibid.*, p. 68.

The primary sources consulted were the *New York Times* and *The Diary of a Diplomat in Russia*. *The Diary of a Diplomat in Russia* was written by a French diplomat under Ambassador Noulens by the name of Louis de Robien during the period of 1917-1918. De Robien was an eyewitness to the turmoil of the Russian Revolution and the subsequent Russian Civil War. He described the mindset of the Russian populace and the diplomatic community during this period. However, as de Robien pointed out, the diplomatic community was biased in favor of the anti-Bolsheviks because before the overthrow of the tsar they were closely connected with aristocratic circles.<sup>7</sup>

The *New York Times* possessed a wide variety of information related to Russian intervention. I covered a five-month period from May, 1918 to September, 1918, culminating in the actual landing of American troops in Siberia. Editorials, speeches by popular figures and politicians, and foreign reports began circulating in May, 1918, which illustrated the increasing popular and international pressure for Wilson to reach a decision to intervene. The *New York Times* reported the official announcement of American troops entering Russian territory with the landing of troops in Archangel and Vladivostok in the beginning of August. It also contained numerous articles regarding Japanese intentions toward Siberia in the form of interviews with Japanese politicians and reports by its foreign correspondent in Tokyo. The continuation of World War I made any criticism of American actions or of their allies impossible, especially in official announcements.

At the beginning of August, 1918, President Woodrow Wilson sent 5,500

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<sup>7</sup> Louis de Robein, *The Diary of A Diplomat in Russia, 1917-1918* (New York: Praeger, 1967), p. 278.

troops to northern Russia via Archangel and 7,000 troops to Siberia via Vladivostok as part of limited allied intervention to help the Russian "people." For months, Wilson had been the lone voice of dissent among the allies. Wilson stated that "military intervention in Russia would more likely add to the present sad confusion there than to cure it."<sup>8</sup> What had changed Wilson's steadfast decision not to intervene?

The Bolshevik government withdrew from the war and concluded a peace treaty with Germany in March of 1918. England and France considered the Brest-Litovsk treaty a betrayal and sought to convince the United States to initiate military intervention to bring Russia back into the war. France and Great Britain considered it paramount to reestablish a eastern front to relieve the pressure the Germans were inflicting on the western front.<sup>9</sup> The press was full of editorials and reports of foreign government officials urging American military intervention. It was widely believed that the Bolsheviks lacked popular support and that the introduction of American troops would constitute a rallying point for the vast democratic element in Russia.<sup>10</sup> Many newspaper sources urged immediate action in the belief that Germany would engulf Russian territory and utilize her vast resources against the allies in the west. A *New York Times* article of May 20, 1918, stated the allies were "running out of time...to delay would aid Germany."<sup>11</sup>

While Wilson was being pressured to intervene, Czech troops trying to return to the western front seized control of eastern Siberia and the Trans-Siberian railroad in May of 1918. By July 6, 1918, Wilson

announced in a cabinet meeting of his intention to intervene on a limited basis to protect the Czechs against the Germans and to render any assistance that the Russian people might request for purposes of self defense.<sup>12</sup> The Wilson administration then invited the Japanese government to cooperate as an "equal" partner in the Siberian expedition. Beginning in August 1918, the allies took part in a two-pronged expedition into Russian territory.

Newspaper sources tend to support the notion that Wilson yielded to vast popular and diplomatic pressure to save the Allies' war effort by reestablishing an eastern front and combatting Germany's intentions in the chaotic Russian territory. The newspapers reported the grave condition of the state of the war and the widespread belief in the German menace in the east. The justification for intervention reported in press accounts was the rescue of Czech troops as they fought their way to freedom to combat the German menace in Siberia.<sup>13</sup> However, German troops were not in Siberia. The vast distances of Siberia made it unlikely that German troops would occupy Siberia. Nor did Wilson believe that a second eastern front could be reestablished. In the aide-memoire detailing the conditions of American involvement, Wilson stated that the reestablishment of an eastern front was not an objective due to limited manpower and great distances.<sup>14</sup> Wilson did not decide to intervene because of pressure from his allies to bring Russia back into the war.

The allied military supplies stockpiled at the two seaports were mentioned in the newspapers as another incentive for Wilson to make a positive

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<sup>8</sup> "Wilson Decides to Send Small Force to Russia," *New York Times*, August 4, 1918, section 1, p. 1.

<sup>9</sup> Unterberger, *America's Siberian Expedition*, p. 21.

<sup>10</sup> "Pro-Ally Sentiment Grows!" *New York Times*, June 4, 1918, section 5, p. 1.

<sup>11</sup> "U.S. Sees Chance to Bring Russia Back into the War," *New York Times*, May 20, 1918, section 1, p. 3.

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<sup>12</sup> George Stewart, *The White Armies of Russia* (New York: Russell & Russell, 1933), p. 114.

<sup>13</sup> "Wilson Decides to Send Small Force to Russia," section 1, page 1.

<sup>14</sup> Foglesong, *America's Secret War*, p. 161.



decision to intervene. The Allies should prevent the aforementioned supplies from falling into German hands.<sup>15</sup> One of the military objectives stated in Wilson's aide-memoire was the use of U.S. troops to protect these military stores. The secondary sources downplay this rationale due to the fact that the Bolsheviks had already seized the supplies located in Archangel,<sup>16</sup> and certainly the Japanese utilized the supplies located in Vladivostok once the intervention occurred. This information may or may not have been known to Wilson because of the small amount of intelligence coming out of Russia, but most historians dismiss this issue as a contributing factor.

Czech prisoners of war trying to vacate Russia via Vladivostok to go back to the western front started an uprising in Siberia in May, 1918. Armed German and Austrian prisoners of war that were also reported in the area. The Wilson administration's announcement of military intervention stated that the principal motive was to help the Czechs fight their way out of Russia. The democratic fervor of the Czechs appealed to the idealism of Wilson. However, the Czechs did not need assistance. By the time Wilson announced his intention to intervene, they had already seized control of eastern Siberia and the Trans-Siberian railroad. The reports of armed German prisoners were exaggerated by Great Britain, France, and Japan to provoke Wilson into deciding for intervention.<sup>17</sup> Beginning with the successes of the Czech troops, the Allies discussed the possibility of keeping the Czech troops in Russia to control the chaos. The Czech government agreed to the Allied

request because their country's existence depended upon Allied victory in World War I.<sup>18</sup> The only countries that had troops and resources to spare were the United States and Japan. Known as the advocate for national self-determination, Wilson was worried about international opinion if America intervened in Russia. Japan was eager to intervene and had proposed to supply all the troops, but the United States was against sole Japanese intervention in Russia. The Czech troops provided an alternate moral route for Wilson. Wilson stated that "these people are the cousins of the Russians."<sup>19</sup> Czech troops would be accepted by the Russian people; Japanese troops would not. The democratic fervor of the Czech troops and their determination for an independent Czech republic would satisfy world opinion and allow the United States to intervene with a minimum number of troops. To view the opportunity presented by the Czechs as the impetus to intervention, one would have to accept that the only exception to sole Japanese intervention is that it would be unacceptable to the Russians.

Anti-Bolshevism is another commonly cited reason for intervention. William Appleman Williams described the secret and covert ways the Wilson administration sought to undermine the Bolsheviks. The Wilson government stopped financial credits and military contracts once the Bolsheviks seized power. In December, 1917, Wilson authorized aid to the volunteer army in southern Russia, and, with American support, the Russian embassy in Washington sent millions of dollars in supplies to White forces in Siberia.<sup>20</sup> Wilson believed in secret war because overt intervention would not be condoned by American principles or public

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<sup>15</sup> "U.S. Sees Chance to Bring Russia Back Into War," section 1, p. 3.

<sup>16</sup> Foglesong, *America's Secret War*, p. 204.

<sup>17</sup> John Albert White, *The Siberian Intervention* (Princeton: Princeton University Press, 1950), p. 233.

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<sup>18</sup> "Allies to Negotiate With Czechoslovaks," *New York Times*, July 11, 1918, section 2, p. 2.

<sup>19</sup> Foglesong, *America's Secret War*, p. 157.

<sup>20</sup> *Ibid.*, p. 69.

opinion. Wilson did not want to jeopardize his standing as the guardian of world democracy. Williams cited these covert measures as evidence that Wilson always intended to intervene due to his rabid anti-Bolshevism. However, once the intervention was under way, American troops were held under a strict code of conduct of noncombatants followed to the letter by General Graves. The U.S. refused to take part in the allied blockade of Soviet Russia.<sup>21</sup> The only actual fighting occurred when the railroad was threatened or in Archangel where the smaller contingent of American soldiers was under the control of the British. In fact, Wilson threatened to withdraw American troops due to the improper nature of their usage by the British.<sup>22</sup> Russian General Horvath stated, "It seems obvious that the Americans do not intend to help us in our struggle against the Bolsheviks."<sup>23</sup> In fact, Wilson harbored severe anti-Bolshevik feelings and cherished the ideal of a democratic Russia. The *New York Times* reported that Wilson's assurance of good faith was to the Russian people, not the government.<sup>24</sup>

Why would Wilson wait almost a year to intervene when American and world opinion supported intervention as a war measure? The United States was the sole holdout on the question of intervention. The British and French were anxious for any type of military measure just as long as it was immediate. The Japanese had offered to take the sole burden of providing troops, an idea backed by the other Allies but opposed by the American government.

The reason Wilson finally decided on military intervention was because he

believed that sole Japanese intervention was imminent. The Japanese had proposed military intervention into Siberian Russia since the Bolshevik revolution.<sup>25</sup> England and France supported her efforts since they believed in the essential nature of reviving the eastern front and knew that Japan would supply all troops. From the beginning, the United States was against Japanese intervention because of the commonly-held belief in Japanese imperialistic ambitions in Asia. The United States feared Japan would upset the balance of power in Asia and endanger the open door policy in China. Wilson stated in a letter to Ambassador Morris that "Our intention is to adopt a definite policy which will include the open door to Russia free from Japanese domination."<sup>26</sup> Louis de Robien detailed the open discussion among the various diplomatic corps in Finland regarding the possibility of Japanese intervention. From his vantage point in Japan, Ambassador Morris maintained that the Japanese would use the expedition as an excuse to seize control of the Chinese Eastern Railway and dominate Manchuria and eastern Siberia.<sup>27</sup> Japan stated that she possessed a geographic right to protect her interests. In a July 11, 1918 *New York Times* article, Japan articulated the desire for a buffer state and the necessity of Japanese troops to protect the railroads. Japan said it was her duty to help the Russian people due to its role in the defeat of Russia in the Russo-Japanese War in 1905, which had led the Kaiser to believe Russia was weak and to risk the war. Japan did not want interallied intervention because she believed the West would be there in the capacity of watchdogs. A sole Japanese Siberian venture supported by the Allies would constitute a good faith measure that

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<sup>21</sup> White, *Siberian Intervention*, p. 358.

<sup>22</sup> Leonid I. Strakhovsky, *Intervention at Archangel* (Princeton: Princeton University Press, 1944), p. 90.

<sup>23</sup> White, *Siberian Intervention*, p. 262.

<sup>24</sup> "Wilson Decides to Send Small Force to Russia," section 1, p. 1.

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<sup>25</sup> "Will Vladivostok Prove Another Sarajevo?" *New York Times*, June 2, 1918, VII.

<sup>26</sup> White, *Siberian Intervention*, p. 134.

<sup>27</sup> Unterberger, *America's Siberian Expedition*, p. 81.

would prove to Japan of the trust placed to her.<sup>28</sup>

Exiled members of the Kerensky government objected to the Japanese, fearing Japanese intentions. General K.M. Oberoucheff was in New York urging American assistance and stated his view on Japanese intervention: "If Japanese troops had intervened in Russia, even with an absolute declaration that they were compelled to do so for the common good of all, even then her presence might have been interpreted as interfering with Russian affairs in order to demand later concessions."<sup>29</sup> Since the exiled Kerensky government was anxious for allied intervention to wrestle control from the Bolsheviks, its refusal of Japanese assistance represented a fear of Japanese imperialism.

The United States refused to intervene for six months despite pressure to do so from all corners. In the meantime, Japan was making known her intention to move regardless of American wishes. A reported murder of three Japanese businessmen by Russian bandits in Vladivostok on April, 1918, precipitated the landing of Japanese troops in that city. A *New York Times* editorial compared the event to Sarajevo as an excuse for Japanese action.<sup>30</sup> In May, Japan concluded a secret treaty with China allowing Japan a base of operations in Manchuria for a thrust into Siberia. This treaty with Japan was viewed as a preview for Japanese aggression.

Wilson indicated an intention to intervene in northern Russia in May, but he held out Siberian intervention in the hope of stalling the Japanese.<sup>31</sup> Wilson did not commit troops to Archangel until the

question of Siberian intervention was answered. If troops were sent into northern Russia, what was going to stop the Japanese from entering Siberia? As the possibility of Japanese action became more likely, the Wilson administration took notice. The decision to intervene in Siberia took place in the July 6 Cabinet meeting, and Japan was invited to participate in a joint venture provided that she met with some American demands. Joint cooperation required an equal relationship, and Washington demanded equal representation in troops. The United States and Japan would each provide 7,000 troops. Wilson desired a small force so as not to antagonize the Russians. Official announcements were delayed while Wilson waited for the Japanese response. Japan accepted America's terms on July 23, 1918.<sup>32</sup>

Was American caution over Japanese involvement correct? Secondary sources uphold this position. The American expedition consisted of the agreed-upon 7,000 troops, but within three months the Japanese had over 60,000 troops stationed in Siberia.<sup>33</sup> Incidents of atrocities committed by Japanese troops and murders of peaceful Bolsheviks were reported. Cooperation between the Americans and Japanese quickly deteriorated. The Japanese regarded the Americans as their nemesis, producing anti-American propaganda.<sup>34</sup> The Japanese supported the Cossack leader, Semenov, who in the name of Siberian independence, was pillaging the local countryside. The Japanese were hoping for mass chaos as a smokescreen for their real intentions.

The main duty of the occupation troops was the guarding of the Trans-

<sup>28</sup> Ibid., p. 24.

<sup>29</sup> "Allied Aid Would Be Welcomed," *New York Times*, June 2, 1918, section 7, p. 1.

<sup>30</sup> "Will Vladivostok Prove Another Sarajevo?" VII.

<sup>31</sup> Unterberger, *America's Siberian Expedition*, p. 52.

<sup>32</sup> "Americans With Japan to Help Czechs In Siberia," *New York Times*, July 23, 1918, section 1, p. 3.

<sup>33</sup> George Stewart, *The White Armies Of Russia* (New York: Russell & Russell, 1933), p. 153.

<sup>34</sup> Unterberger, *America's Siberian Expedition*, p. 65.

Siberian and Chinese Eastern railway. At railway stations under their control, the Japanese deposed Russian railway officials and placed the Japanese flag over every station.<sup>35</sup> The Americans ran into constant tension over the railroad with the Japanese who resented their presence. John Stevens, an American railway expert stationed in Siberia, complained of Japanese interference at every turn.<sup>36</sup>

The American withdrawal of troops did not take place until a year after the withdrawal from northern Russia despite tremendous public pressure to bring the boys home. Ironically, it was the presence of American troops still in Siberia after the end of the war that contributed more than anything else to the Senate's failure to pass Wilson's treasured League of Nations. The departure of Allied troops from Russia in 1920 did not deflect Japanese efforts. The Japanese continued to occupy their position in eastern Siberia until 1922. The immense pressure of the American government and the diplomatic isolation of the Japanese during the Washington Conference precipitated the withdrawal.

The Wilson government was anti-Bolshevik and hoped for the return of a democratic Russia. The common viewpoint at the time was that the Bolsheviks represented a small percentage of the population and that their downfall was imminent. The view surely contributed to the covert economic measures taken by the Wilson administration in lieu of military intervention after the Bolshevik revolution. The intervention in northern Russia possessed military value due to the rebellion for Finnish independence by the Red Finns, assisted by the Germans. The occupation of the Ukraine by Germany and the weak nature of the Bolshevik government made

the Allies fear the seizure of Russian resources by Germany to continue the war effort. In this instance, the northern Russian intervention stopped the German menace and contributed to the war effort.

The Siberian intervention was undertaken to control Japanese ambitions to dominate Russian territory. No anti-Japanese comments were located in the official press reports because Japan was an ally, although there was much speculation over Japanese intentions following the murder of Japanese businessmen and the secret treaty with China. Japan had been taking advantage of the preoccupation of the Allies with World War I to seize control of Germany's Pacific holdings and to gain a foothold in China. The weakness of China's sovereignty made the American open door policy unstable. The American government was aware of these doings and stalled for time. Japan could not intervene alone unless she possessed the approval of the Allied nations. Japan was a poor nation and required American steel and oil. If Japan could gain America's acceptance of Japanese intervention, it could use Siberia as a replacement source for natural resources.

The United States had followed a consistent policy regarding Japan since the Russo-Japanese War of 1905. President Roosevelt served as mediator in the peace conference, nixing Japanese expectations of vast Russian territory. The United States did not want a tip in the balance of power in the region weakening their open door policy in China. Japan resented the United States for denying its "place in the sun." Japanese imperialism mirrored German ambitions for colonies for Japanese settlers and the need for more resources. The "new" powers sought to expand as the Western powers had done earlier. The Siberian intervention must be viewed as a movement to control Japanese expansion and the desires of the Japanese to expand their "new" power. Less

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<sup>35</sup> White, *Siberian Intervention*, p. 195.

<sup>36</sup> Unterberger, *America's Siberian Expedition*, p. 108.

than a decade after Japanese withdrawal from Siberia, Japan invaded Manchuria in a continuation of this quest.