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THEOLOGY



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INTERPRETATIVE PECULIARITIES OF THE COMMENTARY ON THE ACTS OF THE APOSTLES BY BEDE THE VENERABLE

Abstract

In the *Commentary on the Acts of the Apostles*, Bede the Venerable goes beyond the literary level of the biblical text. Wishing to elucidate its message to the readers, he explains historical problems, deals with dating or refers to geographic and topographic data which provide the background to biblical events, so that the meaning of the inspired books could be best understood by his contemporaries. In this sense, the methodology used by Bede can be even more justifiably defined as eclectic and pastoral. Due to this approach, the *Commentary on the Acts of the Apostles* discussed in this article bears the hallmarks of originality as regards theological, philological as well as geographical aspects of the work.

Keywords: Patristic exegesis, Bede the Venerable, biblical theology, Acts of the Apostles

OSOBLIWOŚCI INTERPRETACYJNE KOMENTARZA DO DZIEJÓW APOSTOLSKICH BĘDY CZCIGODNEGO

Abstrakt

W *Komentarzu do Dziejów Apostolskich* Beda Czcigodny nie zatrzymuje się jedynie na warstwie literackiej tekstu biblijnego. Pragnąc przybliżyć jego przesłanie swoim czytelnikom, objaśnia on problemy historyczne, zajmuje się datacją, sięga do danych geograficznych i topograficznych, będących sceną biblijnych wydarzeń, po to, by przesłanie ksiąg natchnionych było jak najlepiej zrozumiane przez jemu współczesnych. W tym sensie bardziej metodologię stosowaną przez Bedę należały uznać za eklektyczną i pastoralną. Takie podejście sprawiło, że omawiany w tym artykule *Komentarz do Dziejów Apostolskich* nosi znamiona oryginalności tak pod względem teologicznym, jak również filologicznym i geograficznym.

Słowa kluczowe: egzegeza patrystyczna, Beda Czcigodny, teologia biblijna, Dzieje Apostolskie

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INTRODUCTION

Based on at least partial perusal of Bede the Venerable's works, it can be concluded that his exegetical writings have a didactic character and concentrate on broadly understood pastoral influence accommodating for the needs of the author's contemporaries. The same refers to his *Commentary on the Acts of the Apostles* belonging, as it might be deduced from the introductory letter in which *Doctor Venerabilis* dedicates his work to the Bishop of Acca of Hexham, to the early writings of his *opera exegetica* and being usually dated for the years between 709 and 716 (Whiting 1966, 17). At that time, Bede intended to provide a comment on the Gospel of Luke, however, compelled by time, he limited his work to the second part of the writings of the third evangelist, because, as he himself explained: "In the meantime, however, lest the authority of your request be disparaged, I have done what I could. I have sent you a little work on the Acts of the Apostles, which was produced not many days ago, and, so as not to impede your most holy will, I put it out as quickly as time permitted in corrected form on little parchments".

In fact, the *Commentary on the Acts of the Apostles* cannot be regarded as a systematic reference to the entire first history of Christianity, as it is evidenced by the apportionment of the material. Some chapters seem to have been treated rather briefly by Bede, in others his exegesis encompasses philological nuances of individual words and expressions, and still elsewhere, some verses are completely omitted. Probably such an approach to the subject of his study forced Bede the Venerable to write around the year 730, a second work devoted to the Book of Acts of the Apostles - *Retractatio in Actus Apostolorum*, in order - as he himself noted - "to add what I had previously overlooked, or to correct what seems to have been stated differently than I would wish" (PL 92,995C). In the case of both of the above-mentioned works, Bede goes beyond the literary level of the biblical text. Wishing to elucidate its message to the readers, he explains historical problems, deals with dating, refers to geographic and topographic data which provide the background to biblical events, so that the meaning of the inspired books could be best understood by his contemporaries. In this sense, it would be more justifiable to define the methodology used by Bede as eclectic and pastoral (Ray 1982, 9). Indeed, the Doctor of the Church tried to understand the mysteries of the Sacred Scriptures, reaching, inter alia, to the seven hermeneutical principles of Ticonius² with which he got acquainted while reading *De doctrina christiana* of St. Augustine³. However, Bede was aware that his potential readers, due to the level

² Ticonius was a Christian writer and a Donatist, writing in the years 370-390.

³ "Tichonius quidam qui contra Donatistas invictissime scripsit, cum fuerit donatista, et illic invenitur absurdissimi cordis, ubi eos non omni ex parte relinquere voluit, fecit librum quem Regularum vocavit, quia in eo quasdam septem regulas exsecutus est, quibus quasi clavibus divinarum Scripturarum aperirentur occulta. Quarum primam ponit, De Domino et eius corpore; secundam, De Domini corpore bipartito; tertiam, De promissis et Lege; quartam, De specie et genere; quintam, De temporibus; sextam, De recapitulatione; septimam, De diabolo et eius corpore. Quae quidem

of their erudition as well as knowledge of Latin, need not so much the “solid food” in the form of systematic, scientific commentaries on individual biblical books, but rather the “spiritual milk”, i.e., simple explanations of pictorial character. Due to this approach, the *Commentary on the Acts of the Apostles* discussed in this article bears the hallmarks of originality as regards theological, philological as well as geographical aspects of the work.

1. THEOLOGICAL PECULIARITIES

Bearing in mind the fact that Bede’s work was primarily addressed to young adepts of religious life and to the relatively young Church of England which was in need of strengthening its faith (Sztuk 2018, 19), one can hardly be surprised at his praise of the perseverance of religious communities⁴ founded by Augustine of Canterbury in the spirit of the first Jerusalem community whose picture was presented in Acts 4:32. Following the path set by the patristic tradition, Bede perceived this community as a model to be followed by his brothers, arguing in the *Commentary on the Acts*: “Those who had completely left the world behind by no means pushed themselves forward, one over the other, glorying in the nobility of other birth. Rather, as though born from the womb of one and the same mother, the church, they all rejoiced in one and the same love of brotherhood” (4:32). It also seems that this first Church community, beginning with the apostles, entrusted by Christ on the Mount of Olives with the task of being “witnesses in Jerusalem, in all Judea and Samaria, and to the ends of the earth”⁵, became a model for those who, in Bede’s time, were to set out on the mission of preaching the word.

To point to the universalism of the mission and at the same time to the spread of the Good News both to Jews and Gentiles, Bede enriches interpretation of Acts 4:11 with an excerpt from of a Christological hymn (Eph 2:14-15) and presents Christ as the cornerstone that unites the Church consisting of two peoples: “The builders were the Jews, while all the gentiles remained in the wasteland of idols. The Jews alone were daily reading the law and the prophets for the building up the people. As they

consideratae, sicut ab illo aperiuntur, non parum adiuvant ad penetranda quae tecta sunt divinatorum eloquiorum” (PL 34,081). Bede quotes and discusses the *Rules* of Ticonius in the Letter to Eusebius, which provides an introduction to his Commentary on the Book of Revelation, and he refers to Ticonius himself as: “vir inter suos eruditissimus” (PL 93,131-134).

⁴ Cf. *HEGA I*,26: “Ut idem in Cantia primitivae Ecclesiae et doctrinam sit imitatus et vitam, atque in urbe regis sedem episcopatus acceperit. At ubi datam sibi mansionem intraverant, coeperunt apostolicam primitivae Ecclesiae vitam imitari; orationibus, videlicet, assiduis, vigiliis, ac ieiuniis serviendo, verbum vitae quibus poterant praedicando, cuncta huius mundi velut aliena spernendo, ea tantum quae victui necessaria videbantur, ab eis quos docebant, accipiendo, secundum ea quae docebant ipsi per omnia vivendo, et paratum ad patiendum adversa quaeque, vel etiam ad moriendum pro ea quam praedicabant veritate, animum habendo. Quid mora? Crediderunt nonnulli, et baptizabantur, mirantes simplicitatem innocentis vitae, ac dulcedinem doctrinae eorum caelestis”.

⁵ Acts 1,8. Many contemporary exegetes see here the programmatic and structuring verse of the Book of Acts (Conzelmann 1987, 7; Kręcidło 2008, 19-24).

were building, they came to the cornerstone, which embraces two walls – that is, they found in the prophetic scriptures that Christ, who would bring together in himself two peoples, was to come in the flesh. And, because they preferred to remain in one wall, that is, to be saved alone, they rejected the stone, which was not one-sided, but two-sided. Nevertheless, although they were unwilling, God by himself placed this [stone] at the chief position in the corner, so that from two testaments and two peoples there might rise up a building of one and the same faith”⁶.

As regards the order of assimilating the Good News, Bede in his commentary was able to combine in an allegorical manner two seemingly distant pericopes recounting successively the story about the lame man healed in the temple by Peter (3:2) and about the Lyconian man taken down by the same affliction and healed by Paul (14:7). According to Bede, who relates material facts to spiritual realities, the first man symbolizes the Jews, and the second the pagans converted to the faith in Christ: “The times are appropriate to the exposition, for the former [i.e., the lame man cured by Peter and John] was cured in the earliest days of faith, when the word was not yet believed by gentiles. The latter [i.e., the lame Lyconian] was cured in the midst of the new joys of the converted gentile world, when the Jews had been excluded for their lack of faith and sprinkled with the dust of damnation”⁷.

The *Commentary* provides also allegories that bring out a deeper spiritual meaning, such as the interpretation of Acts 27:33, which recounts how St. Paul saved his companions on the cruise to Rome: “When Paul persuaded the men he had promised would be saved from shipwreck to take the food; also in the fact that in the middle of the night they were kept from going wrong by four anchors in the violence of the waves; and that with the coming of day they climbed out onto a point of land. No one escapes the tempests of this world except those who are nourished by the bread of life, and one who in the night of present tribulations depends for all his strength on wisdom, fortitude, temperance, and justice will soon, with the shining forth of divine help, reach the port of salvation which he had”. Also, Bede’s interpretation of St. Paul’s escape from Damascus (Acts 9:25), can be regarded as an in-depth reflection on the universal meaning of this passage of the Acts of the Apostles: “Even today this sort of escape is preserved in the church

⁶ Also in the *Commentary on the Revelation*, Bede, interpreting chapter VII and referring allegorically to the individual tribes of Israel, puts a spotlight on them and brings them out of the “crowd that no one could count” (Rev. 7:9), to point out that that it were the tribes of Israel that the Gospel was preached to first, and only then the pagans were to hear about the salvation heralded (PL 93,0152D: “enumeratis tribubus Israel, quibus Evangelium primo praedicatum est, salvationem quoque velit commemorare gentium”). In this sense, both in the *Commentary on the Acts of the Apostles* and in his work on the Apocalypse, Bede draws the conclusion on the universal character of the proclamation and propagation of the word of God.

⁷ Elsewhere (2:19) Bede, explaining the event of Pentecost and the phenomena accompanying it, says: “It is also possible to understand the fire as the enlightening of the faithful, and the vapor of smoke as the blindness of the Jews who did not believe. Whence also when about to give the law the Lord descended in fire and smoke because through the brilliance of his manifestation, he enlightened the humble, and through the murky smoke of error he dimmed the eyes of the proud”.

whenever someone who has enveloped in the snares of the ancient enemy, or in the traps of this world, is saved through the defences of his hope and faith. For the wall of Damascus (which means *drinking blood*) is the adversity of the world. King Aretas (which means *a descent*) is understood to be the evil. The basket, which is usually constructed of rushes and palm leaves, designates the conjunction of faith and hope, for the rush signifies the freshness of faith, and the palm signifies the hope of eternal life. Therefore, anyone who sees himself encircled by wall of adversity should be quick to climb into the basket of the virtues, in which he may make his escape”.

Closely related to the above-mentioned topic of the assimilation of the Good News is the issue of the continuity and unity of revelation, which means also, the unity of the Old and New Testaments (Holder 2010, 150-154). According to Bede, the 120 people gathered at the gates of the Cenacle (1:15) symbolize the perfection of both the old and the new law. However, according to the Doctor of the Church, the unity of the two Testaments rather than excluding, implies progress, i.e., the transition from one to the other and the superiority of the New over the Old: “The tabernacle of David signifies a trace of the law, which was corrupted and torn to pieces by the betrayals of the Pharisees. However, with the Lord’s return, that is, his appearance in the flesh, it was built up by God with spiritual grace, so that not only the Jews, but also all the gentile nations, would seek after his name” (15:16). Elsewhere, the Doctor of the Church justifies his point further: “The ancient tabernacle indeed had ritual ordinances and a sanctuary, though an early one, embellished with gold and silver, but the blood of the gospel, more precious than the metals of the law, springs forth” (3:6).

In his *Commentary*, Bede does stop at the *expositio* of salvatory facts and history. Following in the footsteps of St. Paul, *Doctor Venerabilis* enriches his reflection with moral guidelines. Here, Bede expresses his conviction that the indwelling of the Holy Spirit allows to “transcend the abode of the flesh by contemplation of the mind”, and “the temporal labor of the church will be rewarded with the eternal denarius” (2:1). Bede’s parenthesis does not bear the features of a systematic lecture, because the very genre of the commented book of Holy Scripture seems to point to the paradigmatic nature of the protagonists of the first history of Christianity, i.e., the apostles. They remain for Bede and for all Christians “those who, radiating virtue, have revealed to all the mysteries of Christ” (4:33). Following the above, moral teaching is conveyed by the author of the *Commentary* in the form of numerous, albeit short, sentences, which are to be remembered by the reader, as if incidentally, on the occasion of learning about the characters and events.

2. PHILOSOPHICAL AND TOPOGRAPHIC PECULIARITIES

Bede the Venerable had the unquestionable advantage of the possibility to use the library resources of the abbey in which he lived and wrote, including the Greek

and Latin codes of the Holy Scriptures⁸. Although, in the *Commentary* he does not conduct full and accurate textual criticism in the modern sense and according to modern principles, but in some dubious places he tries to compare different recorded versions of the inspired text and draw conclusions as to the meaning of a given passage of the Acts of the Apostles. Bede does so, among others, in the commentary on Acts 28:11: “After three months we sailed in an Alexandrian ship bearing the emblem of the Dioscurs, which wintered on the island”, in which he writes: “I believe that what was originally written was: insigne Castorum, but through the fault of scribes the letter r was added, just as we often find frustra written for the piece [frusta] of bread, and adpropiat for appropiat in the most of ancient exemplars. For the Greek παρασήμω Διοσκοῦροις is written for insigne Castorum⁹. The twin Castores, that is, Castor and Pollux, are called Διόσκουροι in Greek”.

Another example of Bede’s reference to different versions of the inspired text is the commentary on Acts 7:14, where in his speech Stephen recalls the story contained in Genesis 46:27: “«He sent Joseph for Jacob and brought his father and his whole family, numbering seventy-five». In his discourse he followed the Septuagint. In the original Hebrew, however, we find only seventy souls. Even if you should wish to count up the same lineage of souls in Genesis, you would find only seventy souls, even with the addition of Jacob himself, and Joseph with his two sons who were in Egypt”. Indeed, the text of the LXX mentions seventy-five members of Jacob’s family who came to Egypt (πάσαι ψυχαι οἴκου Ιακωβ αἱ εἰσελθοῦσαι εἰς Αἴγυπτον ἑβδομήκοντα πέντε), while the Hebrew Bible, as well as Jerome who follows it, gives the number of seventy (מִן־רֵגְלֵי־יַעֲקֹב־וְעַד־רֵגְלֵי־יוֹסֵף־שְׁנַיִם־וָעֶשְׂרִים־שֵׁשׁ). Other examples of passages evidencing that Bede conducted a comparative analysis of different versions of the Biblical text, can be found in other places of the commentary on the Acts of the Apostles (4:1; 10:38; 22:18a; 23:6; 26:2.10).

Another example of Bede’s specific interpretation is also his commentary to Acts 18:3, which recount St. Paul’s arrival to Corinth and his devoting himself with Priscilla and Aquila to the craft of making tents: “Now in Greek tents are called σκῆναι, which is etymologically derived from ‘the giving shade’. Among them [Greeks], shade is called σκία. σκῆναι, or σκηνώματα denote a kind of shady covering, which the ancient constructed from woolen, linen, or haircloth curtains, or from branches or cuttings from trees. Mystically, however, just as Peter by fishing

⁸ In Bede’s times, the Wearmouth-Jarrow Abbey was one of the places where the *Codex Amiatinus* was kept. Dated at the turn of the 7th and 8th centuries (698-716), it was copied from manuscripts brought from Italy by Abbot Ceolfrid and, shortly after, moved to the San Salvatore Monastery on Mount Amiata in Tuscany, where it remained until 1786 to be donated later to the Medicea Laurenziana Library in Florence where it has been kept ever since. Moreover, it is believed that Bede had access to at least two other versions of the Vulgate, as well as the *Vetus Latina* manuscripts (including the so-called *Laudianus Graecus* 35) (Farr 1999, 336-344; Meyvert 1995, 348-380).

⁹ In fact, Greek manuscripts present another example of a specific *lectio varians*, because some of them contain the name Διοσκοροις (P74, Ψ, 104, 326, 453). However, this Greek *lectio* adds nothing new to the interpretation of the passage in the Acts of the Apostles, as it is an Attic version of the same name (Cf. LIDELL & SCOTT 1968, 435).

draws us out of the waves of the world by nets of faith, so also Paul, by erecting shady coverings of protection, defends us by his word and deeds from the rain of our faults, from the fierce heat of temptations, and from the winds of the snare”.

The above-presented examples illustrate Bede’s attempt to explain thoroughly the mysteries contained in the biblical text. At that stage of his life and knowledge of Greek, it was probably a challenge (Stenton 1970, 181-186; Lynch 1983, 180)¹⁰.

Bede’s words contained in the Preface to the *Commentary*: “Here I have attempted, insofar as I could, to shed light on those things which seemed to be treated mystically or stated somewhat obscurely” may to a point provide a certain indication as regards the author’s own intention as well as the methodology which he used to create his work. Bede, following the indications of the Fathers of the Church, found it necessary to clarify the details that his great predecessors used to call *swmatika*¹¹, and which for the simple recipient of the messages of the Acts of the Apostles could have been obscure due to the use of incomprehensible names and nuances of historical references¹². Willing to fulfill this task, Bede interprets Stephen’s speech delivered at the gates of Jerusalem (7:16-17) and tries to explain the intricacies of names referring to the burial place of the patriarchs, including Abraham himself, according to the Christocentric key. However, interpretation of the toponyms does not seem to be Bede’s strength which may result from his lack of orientation or more likely, to his disorientation caused by the hypothetical linking of many places in Palestine to a particular toponym in the era of increased interest in holy places in the 5th to 7th centuries. In the same manner, though based on a peculiar philological interpretation of the toponym “Gaza”, Bede explains the passage from the Acts of the Apostles about Philip’s meeting with an Ethiopian courtier (8, 26): “Allegorically this designates the people of the gentiles, who were once separated from the worship of God, uncultivated by the preaching of the prophets. The road which went down to this same place from Jerusalem and opened the fountain of salvation is the Lord Jesus Christ, who said, «I am the way and the truth and the life» (John 14:6). From the Jerusalem above ‘he came down’ to our infirmities, and with the water of baptism he made white the blackness of our guilty condition”.

When explaining the meaning of biblical toponyms and names, *Doctor Venerabilis* likes to refer to the works of Jerome¹³. It should be noted here that Bede

¹⁰ In his article, Lynch made a linguistic comparison of two of Bede’s works on the Acts of the Apostles. Concluding his considerations on the use of the Greek language in the *Commentary*, he states: “The number (one hundred and twenty-five) and the variety of Greek allusions in Re. prove that by that late point in his career Bede was able to translate Greek biblical texts independently” (435).

¹¹ ὄπερ ἐπιγνόντα τὸν Πέτρον προτρεπτικῶς μῆτε κωλύσαι μῆτε προτρέψασθαι. τὸν μὲντοι Ἰωάννην ἔσχατον, συνιδόντα ὅτι τὰ σωματικὰ ἐν τοῖς εὐαγγελίοις δεδήλωται, προτραπέντα ὑπὸ τῶν γνωρίμων, πνεύματι θεοφορηθέντα πνευματικὸν ποιῆσαι εὐαγγέλιον (Eusebius, *Historia Ecclesiastica* VI, 14, 7).

¹² One cannot forget another work by Bede, in which he lists and discusses briefly selected toponyms. Cf. *Expositio de Nominibus locorum, vel civitatum, quae leguntur in libro actuum apostolorum* (PL 92,1033-1040).

¹³ The works mentioned here are: *De situ et nominibus locorum Hebraeorum and Liber interpretationis nominum Hebraicorum*.

refrains from correcting Jerome of Stridon's intuitions even if some of them are often difficult to justify. This can be read as a proof of his relatively poor knowledge of the Hebrew language from which the saint derived the source of his etymology.

And thus, Bede explains that "Philip means 'the mouth of lamp,' and there is a beautiful meaning in 'the mouth of lamp' opening his mouth as he brought the obscurities of prophecy into the light of knowledge" (8:35). Elsewhere, using the Hebrew etymology, he deduces the meaning of the Greek name and strikes a momentous tone: "In a very beautiful way he anticipated by the portent in his name what he was about to experience in reality – abjectly stoned but crowned on high. In Hebrew, however, his name means *your norm*" (6:8).

CONCLUSION

Despite the minor imperfections, noted several centuries after the *Commentary on the Acts of the Apostles* was written, it is difficult to underestimate the wealth of work contributed by Bede the Venerable to the interpretation of Biblical texts. Especially impressive are Bede's broad horizons of interpretation encompassing both the books of the Holy Scriptures and the thoughts of the Church Fathers¹⁴, from which he skillfully drew knowledge on the ways to approach the inspired texts. Bede's efforts to reach to other historical sources beyond the Bible, such as the writings of Josephus must also be remembered here.¹⁵ All this makes Bede the Venerable's *Commentary* a skillful combination of biblical *circumstantiae* and the traditional doctrine and morals. Thus, the peculiarities discussed in this article can be regarded as Bede's original contribution to the history of Biblical interpretation.

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¹⁴ In the case of the two works on the Acts of the Apostles, it was a very discreet procedure, because Bede had no prior Latin commentary on this book of the Bible at his disposal, simply because there was no such a commentary at that time. However, *Doctor Venerabilis* managed to find in the works collected in the library of the Wearmouth-Jarrow Abbey passages relating to some motifs of the first history of Christianity, and he skillfully integrated them into the content of his own commentary. Sometimes, the used text is properly introduced (e.g., in the commentary on Acts 2:2, where Bede referred to some lines from Gregory the Great's *Moralia in Job* 28,1,2).

¹⁵ This particularly relates to *Antiquitates Judaicae*.

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LINGUISTIC ASPECTS OF [NINNA-NANNA DI MADONNA]
PART OF THE CALABRIAN DIALECT POEM LA NOTTE DI NATALE
BY FR. VINCENZO PADULA (1819-1893)

Abstract

The aim of this article is to present a language analysis of one of the most beautiful dialectal poems of Fr. V. Padula. The dialect used by Fr. V. Padula is called the Acrian dialect (spoken in the city of Acri, Cosenza Province) and it belongs to a group of northern Calabrian dialects. The lullaby [*Ninna-nanna di Madonna*], sung by Holy Mary, is the second part of the poem *La Notte di Natale*. Fr. V. Padula was the first artist in history to bring the Acrian dialect to such a level of lyricism and piety. The Acrian dialect served him as a testimony to the Calabrian society and culture. [*Ninna-nanna di Madonna*] includes some biblical references to the main truths of the Christian faith.

Keywords: Southern Italy, Fr. Vincenzo Padula, Calabrian dialects, Italian literature, poetry

JĘZYKOWE ASPEKTY [KOŁYSANKI MADONNY] CZĘŚCI POEMATU W DIALEKCIE KALABRYJSKIM „NOC BOŻONARODZENIOWA” KS. VINCENZO PADULA (1819-1893)

Abstrakt

Celem niniejszego artykułu jest analiza lingwistyczna jednego z najpiękniejszych dialektalnych wierszy ks. V. Padula. Dialekt, którym posługiwał się ks. V. Padula, nazywany jest „dialektem akryjskim” (używany w mieście Acri, Prowincja Cosenza) i zaliczany jest do grupy dialektów północno-kalabryjskich. Kołysanka [*Kołysanka Madonny*], śpiewana przez Najświętszą Maryję Pannę, stanowi drugą część poematu *La Notte di Natale* [*Noc Bożonarodzeniowa*]. Nikt wcześniej przed ks. Padulą nie był w stanie wynieść dialektu akryjskiego na szczyty liryzmu i poezji. Wzmiankowany dialekt

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posłużył poecie jako świadectwo o społeczności i kulturze kalabryjskiej. [*Kołysanka Madonny*] zawiera w sobie niektóre biblijne odniesienia do głównych prawd wiary chrześcijańskiej.

Słowa kluczowe: Włochy Południowe, ks. Vincenzo Padula, dialekty kalabryjskie, literatura włoska, poezja

1. STATUS QUAESTIONIS

Fr. Vincenzo Padula (Acri, 25th March 1819 - Acri, 8th January 1893) was a priest, literary and poet. His compositions in verse have been published on various occasions (magazines, ephemeris, occasional printings for weddings or religious festivals, etc.) and have been collected in *Vincenzo Padula - Poesie Varie e Dialettali* (1930) after his death (cfr. Liguori 2020).

The poem *La Notte di Natale* is rhythmic and colourful in popularity, but only at a certain moment. In the second part, that of the [*Ninna-nanna di Madonna*] sung by Holy Mary to her Child, according to De Giorgi: “the true poetry erupts sudden and high, and the tone becomes dramatic for a long. The presentiment of torture and Calvary, which are in the future of that little Child, breaks the ecstasy and sweetness to give way to emotion. Of course, there is some rhetoric in all this, also the artifice, but it is undeniable, that the effect is never lacking. However it is certain, that no one ever was capable, as the Fr. V. Padula, to carry the Calabrian dialect a such high summits of lyricism and piety, mixed with universal sentiment” (De Giorgi 2014, 93-94).

The poem *La Notte di Natale* consists of 27 sextines *ottonari*, 19 sapphic strophes and 7 octaves. The poem is not a composition, in which the only expressive form has been taken by the people - the Acrian dialect of XIX century. *La Notte di Natale*, and especially [*Ninna-nanna di Madonna*], is the transposition into narrative verses, which the grandmothers used to do, in the approach of the Christmas (cfr. Abbruzzo 1993, 37). It is to be said, that the poem is a peculiar theological treatise, written in figurative language in the Acrian dialect.

The Acrian dialect served Fr. V. Padula to know and testify the Calabrian society and culture until today, and not only in his own town, Acri, for the various religious manifestations around Christmas, but also in Italy, as the example of the poetic value of the dialectal poetry too. He recorded not only the dialect of the more educated classes, but he focused more attention to the dialect of the subaltern classes, whose rich inventory of dialectal voices designated the mentality, customs, culture, beliefs and moments of life of ordinary people.

2. [NINNA-NANNA DI MADONNA] – TEXT IN ACRIAN DIALECT AND TRANSLATION INTO ENGLISH

Duormi, bellezza mia, duormi e riposa, / Chiudi 'a vuccuzza chi pari 'na rosa, / Duormi scuitàtu, cà ti guardu iu, / Zuccaru miu.

Sleep, my beauty, sleep and rest, / Close the little mouth, which looks like a rose, / Sleep peacefully, I'll wake you, / My sugar.

Duormi, e chiudi l'occhiuzzu tunnu tunnu; / Cà quannu duormi tu, dormi lu munnu; / Cà lu munnu è de tia lu serbituri, / Tu sì 'u Signuri.

Sleep, and close the little eye round round; / When you sleep, sleep the world; / That the world is yours servant, / You are the Lord.

Dormi lu mari, e dormi la timpesta, / Dormi lu vientu e dormi la furesta, / E puru 'intra lu 'nfiernu lu dannatu / Sta riposatu.

The sea sleeps, and the storm sleeps, / The wind sleeps, and the forest sleeps, / And even in hell the damned / Is resting.

Ti tiegnu 'mbrazza, e sientu 'na paura; / Cà Tu si Diu, ed iu sugnu criatura, / E mi sguilla allu sinu, e vò 'nfassatu / Chi mà cnatu.

I hold You in my arms, and I feel a fear, / You are God, and I am a creature, / And my breast wanders, and wants to be bandaged / I was created by You.

Occhiuzzi scippa-cori, jativinni! / 'U' mi guardati, cà fazzu li pinni'. / Na vuci 'nterna, chi la sientu iu sula, / Mi dici: Vula!

Eyes tears-hearts, go away! / Do not look at me, I'll put the pens on. / An intimate voice, that I feel alone, / It tells me - Go!

'A ninna 'è ss'uocchj tua m'ardi e m'abbaglia; / Tutta l'anima mia trema e ti squaglia; / Canta cum' 'u cardillu, e asciri fori / Mi vò lu cori.

The sleep of yours little eyes burns and dazzles me; / My whole soul trembles and melts; / Sing like the candlestick, and get out / My heart desires.

Ti viju dintra l'uocchi 'n autru munnu, / Ci viju 'n autru Paravisu 'n funnu: / Sientu 'na cosa, chi mi fa morire, / Nè si pò diri.

I see another world in your eyes, / I see another Heaven at the bottom: / I feel something that makes me die, / It can't be described.

Chiudili, biellu, pe' pietà, e riposa; / Chiudi 'a vuccuzza chi pari 'na rosa: / Duormi scuitàtu, cà ti guardu iu, / Zuccaru miu.

Close them, beautiful, for mercy, and rest; / Close the small mouth that looks like a rose: / Sleep peacefully, I'll wake you, / My sugar.

U suannu è gghiutu a cògliari jurilli, / Pe' fari 'na curuna a 'ssi capilli; / E 'ssa vuccuzza 'è milu cannameli / T'unta cu' meli.

Sleep has gone to collect little flowers, / To weave a crown for Yours hair; / And this little mouth of sugar cane / Will be greased with honey.

Ccu' 'n acu 'mmanu è ghiutu supr' 'a luna / A cùsari li stilli ad una, ad una; / Pu' ti li mindi 'n canna pe ghiannacca, / E ci l'attacca.

With a needle in hand he went to the Moon / To sew the stars one-to-one; / Then he puts them around Yours neck as necklace, / And he attacks them to You.

Chi s'iti mo venuti a fari llucocu, / Angiuli 'è Diu, cu' chilli scilli 'è fuocu? / Mi voliti arrobbari 'u figliu miu, / Angiuli 'è Diu?

What have you come here to do, / Angels of God, with those wings of fire? / Do you want to kidnap my Son, / Angels of God?

Cantati, sì; ma 'n cielu 'u' b' 'u chiamati: / Aduratu, sì; ma 'u' b' 'u pigliati: / E Tu, bellezza, 'un fùjari cu' loru; / Si no, mi muoru.

Sing, yes; but in heaven you do not call Him: / Adore, yes; but do not take Him: / And You, Beauty, do not run away with them; / If not, I'll die.

Statti, trisuoru mia, cu mamma tua; / Mo chi ti tiegnu, nenti vuogliu cchiùa; / Cu' Tia vuogliu lu munnu caminari / Sempri, e cantàri;

Stay, my Dear, with Your Mother; / Now having You, I want nothing more; / I want to fly the world with You / Singing forever;

E diri a tutti: Chissu è Figliu miu; / 'A mamma è povarella, 'u Figliu è Diu: / D'u cielu m'è shcoppatu 'ssu Bomminu / 'Intra lu sinu.

And to say to everyone: - This is my Son; / The Mother is poor, the Son is God; / From the heaven this Child fell / Into my womb.

Ma ch'aju dittu? E nun sacciu iu lu riestu? / T'ammucciu 'mpiettu, o Figliu mia, cchiu priestu: / U munnu è malandrinu!, e si t'appura, / Oh, chi sbentura!

What have I said? And do not I know the rest? / I hide you in the breast my Child: / The world is so perfidious!, and if it finds You, / Oh what a misfortune!

Pe' 'ssi capilli tua criscinu spini, / E pe' 'nchiovàri 'ssi jidita fini, / Piensu c' 'a forgia² mo vatti, e nun sa / Chillu chi fa.

For thorns Yours hair grow, / And these fine fingers to nail, / I hear the forge beats, and nobody does not know / Who does it.

'A senti dintr' 'u vuoshcu Tu 'ssa vuci? / Nun è lu vientu no chi si ci 'nfuci: / È la cerza chi grida «'U lignu miu / Cruci è de Diu!»

Do you hear this voice in the woods? / It is not the wind that penetrates by force: / And the oak cries «From my wood / Cross will be for God!»

Ah, nun chiàngiari, no! Pecchè o Bomminu, / Mi triemi cumu 'na rinnina 'n sinu? / Pe' mo, duormi scuitàtu: tannu, pua / C'è mamma tua.

Ah, do not cry, no! Why o Child, / Are you trembling like a swallow at the breast? / For now, sleep peacefully: then, / There's Your Mother.

Supra li vrazza mia, supr' 'i jinuocchi / Zumpa, âza 'a capu, de apirelli l'uocchi. / Quantu sì biellu! Chi ghiurillu spasu! / Dammi 'nu vasu! (Padula 1993, 64-68).

In my arms, on my knees / Skip, raise Your head, and open Your eyes. / How beautiful You are! Like a flourish flower! / Give me a kiss!

3. CALABRIAN DIALECTS AND THEIR ORIGINS

The expression “Calabrian dialects” defines the Romance language varieties spoken in the Italian region of Calabria. They belong to two different groups: the northern (Cosentino dialect - *u cusindinu*), a diasystem of the Neapolitan language [*e parràte calabbrise*]; the southern, a diasystem of the Sicilian language, and also identified as a “*tricalabrum*” [*i parrati calabbrisi*]. This linguistic division corresponds very roughly to the historical administrative division of Calabria: *Calabria Citeriore* - Latin Calabria, and *Calabria Ulteriore* - Greek Calabria (cfr. Dorsa 1876, 3-5).

² *Forgia* (French - *forge*) by extension indicates the blacksmith's workshop, called, therefore, *forgiatu* (cfr. Abbruzzo 1993, 68 - note 69).

If we would like to compare the dialects of southern Calabria with those spoken in northern Calabria, we can notice the strong contrasts. An example is the form of *perfetto indicativo*, which has two forms in the two different zones: in North-Calabria is similar to the Italian *passato prossimo*; in the South-Calabria remembers the Italian *passato remoto*, hence the great mistake to call this “*passato remoto*” also in Calabria (in reality it is exactly equivalent of the Latin *perfectum*, from which derives). In fact, even a non-remote action is expressed with *perfetto* (cfr. Dorsa 1876, 25-27).

The Calabrian dialects are rich of linguistic influences, due to colonization, domination and incursions of different peoples: Greeks, Romans, Arabs, French. The primary roots of dialects are the Latin and the Greek, but they have also a rich and various influences from the French (cfr. Dorsa 1876, 5-7).

The Latin represents the fundamental linguistic *substratum*. It should be noted, that the most ancient Latin terms appear mostly in northern Calabria, due to the fact, that in southern Calabria the latinization occurred more recently (cfr. Dorsa 1876, 39-54). Some examples of latinisms in Calabrian dialects: *crai* (northern Calabrian) - tomorrow - in Latin *cras*; *interimme* (northern Calabrian), *frammènti* / *'ntramenti* (southern Calabrian) - meanwhile - in Latin *interim*; *capistru* (northern Calabrian), *capizza* / *capu* (southern Calabrian) - halter - in Latin *capistrum*; *alare* (northern Calabrian), *farnijàri* / *casmiari* (southern Calabrian) - to yawn - in Latin *hio*, *oscito*.

The Greek is the other element strongly characterizing the Calabrian dialects. It is extraordinarily represented by the language spoken in the southern part. For a long time in most of the area the Grecanico - in some centers such as Bova, Roghudi, a few other towns in the Amendolea area and some districts of Reggio Calabria - was the most spoken language (cfr. Paternostro 2012, VI-VII).

The Greek language is abundantly represented in the dialect of southern Calabria. The findings are in many facts: the oppositions of voices to indicate the same object or animal or plant; the verbal construction has a precise Greek imprint in the southern Calabrian dialect; the Greek impression is easily traceable in many toponyms and surnames (cfr. Dorsa 1876, 27-39). Some examples: *batràci* / *agrofàcu* / *gianneja* (southern Calabrian), *ranùnchiulu* (northern Calabrian) - frog - in Greek *botrakòs*; *'bampuriddha* / *lampuridda* / *vampuriddha* (southern Calabrian), *culilùcida* (northern Calabrian) - firefly - in Greek *lampurida*; *'geramida* (southern Calabrian) - tile - in Greek *keràmìdion*; *ciràsa* / *'geràsa* / *i cires* (southern Calabrian) - cherries - in Greek *keràsa*.

The *arabismi*. The Saracens never exercised dominion in the current Calabria, limiting themselves to frequent raids on the coasts between the 10th and 11th centuries. Being the masters of Sicily, the Arabs exploited their privileged position to subject the coastal cities of Calabria to tributes and, in any case, to entertain trade and exchange relations (cfr. Paternostro 2012, IX-X). All this involved an acquisition of certain *arabismi*. For example: *zirra* / *zirru* / *giarra* (Calabrian dialect) - container for oil - in Arabic *zir*; *sciàbaca* / *sciàbachèju* (Calabrian dialect)

- fishing network - in Arabic *sabaka*; *limbiccu* / *muccu* (Calabrian dialect) - snout - in Arabic *al-ambiq*.

The *francesimi*. Calabria was under the Norman domination from 1060 up to almost the whole 12th century. In this period the words of Francophone derivation have penetrated the Calabrian vocabulary. It must be also remembered, that French is a neo-Latin language, and between 1266 and 1442 the house of Anjou held the Kingdom of Naples under its crown (cfr. Paternostro 2012, X). Some examples of *francesimi*: *abaciurra* / *abbaciurra* / *abbasciù* (Calabrian dialect) - lamp, lampshade - in French *abat-jour*; *accia* (Calabrian dialect) - celery - in French *ache*; *buàtta* (Calabrian dialect) - can - in French *boîte*; *perciàri* (Calabrian dialect) - to pierce, to penetrate - in French *percer*.

4. CHARACTERISTIC ISSUES OF THE CALABRIAN DIALECTS

It is interesting to present the conjugations of verbs „to be” [*Èssiri*] and „to have” [*Airi*] in the simple present tense. Be aware, that there is no neuter in both: Italian language and Calabrian dialects. The verb *Èssiri* [to be]: (*J*)èu *sugnu* - I am; *Tu(ni) si* - You are; *Iddhu, Iddha èsti* - He, She, It is; *Nu(i) simu* - We are; *Vu(i) sítu* - You are; *Iddhi sunnu* - They are. The verb *Airi* [to have]: (*J*)èu *haju* - I have; *Tu(ni) hai* - You have; *Iddhu, Iddha havi* - He, She, It has; *Nui aimu* - We have; *Vui aítu* - You have; *Iddhi hannu* - They have (cfr. Cattaneo 2009, 51-61).

Regarding the accent in Calabrian dialect, as Dorsa states, it follows the Latin accent, which takes place only in the penultimate and the antepenultimate syllable, rejecting any bony voice. There is also a freedom of accentuation in the words, often given to the Latin or Greek archaic forms; the pronunciation was left of the people will (cfr. Dorsa 1876, 20).

The dialect used by Fr. V. Padula to compose *La Notte di Natale* is to be called the Acrian dialect (spoken in the city of Acri, Cosenza Province), which belongs to the group of northern Calabrian dialects. The voices are identical to the Italian correspondents, less a strong nasal accentuation in the vowels, especially before *m* and *n* (cfr. Dorsa 1876, 7).

As Abbruzzo states in his commentary on *La Notte di Natale*, the preposition *in* connected with words beginning with *b*, transforms into a *double m* (*'m*) (cfr. Abbruzzo 1993, 65 - note 63). So we have for example: *mmrazza, mmucca*. This phenomenon is observed in the sentence: „*Ti tiegnu 'mbrazza, e sientu 'na paura*” - [*Ti tengo in braccio, e sento una paura*].

As Dorsa and De Rose state, the softening of the *b* in its corresponding labial *v* is another fact which indicates the ancient influence of the Greek language (cfr. Dorsa 1876, 8; De Rose 2012, 20): *vucuzza* - *bocca* [mouth]; *vasu* - *bacio* [kiss]; *spasu* - *sbocciato* [blossomed]. This phenomenon is observed in the sentence: “*Chiudi 'a vucuzza chi pari 'na rosa, / (...) Chi ghiurillu spasu! / Dammi 'nu vasu!*”.

The prevalence of *u* on *o* is to be observed (cfr. De Rose 2012, 21): *uocchj* - *occhi* [eyes]; *cardillu* - *cardello* [goldfinch]; *fazzu* - *faccio* [I do]; *viju* - *vedo* [I see].

This phenomenon is observed in the sentence: “*Ti viju dintra l’uocchi ‘n autru munnu, / Ci viju ‘n autru Paravisu ‘n funnu: / Sientu ‘na cosa, chi mi fa moriri*”.

Another linguistic phenomenon is predominance of *i* on *e* in the beginning, in the middle, and in the end of the words (cfr. Dorsa 1876, 9): *fimmina* - *femmina* [woman]; *sira* - *sera* [evening]; *siminare* - *seminare* [to sow]; *ishca* - *esca* [bait]; *asciri* - *uscire* [go out]. This phenomenon is observed in the sentence: “*Statti, trisuoru mia, cu mamma tua; / Mo chi ti tiegnu, nenti vuogliu cchiù; / Cu’ Tia vuogliu lu munnu caminari*”.

In the discussed dialectal poem, we have also the consonant *j* at the beginning of the words: “*Occhiuzzi scippa-cori, jativinni! / (...) U suannu è ghhiutu a cògliari jurilli, / (...) E pe’ ‘nchiovàri ‘ssi jidita fini, / (...) Supra li vrazza mia, supr’ ‘i jinuocchi*”. Where: *jativinni* - *andatevene* [go away]; *jurilli* - *fiorellini* [flowers]; *jidita* - *dita* [fingers]; *jinuocchi* - *ginocchia* [knees]. According to V. Dorsa, there are three sounds of the spirants (*j*, *v*, *s*), which Greek lost. Those sounds survived even more places of Calabria, especially in the regions bordering with the Basilicata region; sometimes the soft *j* passes into the structural or palatine sour *gh* (cfr. Dorsa 1876, 16).

As De Rose states, the *nd* group becomes *nnu* (cfr. De Rose 2012, 21). For example: „*Cà quannu duormi tu, dormi lu munnu*” - [che **quando** dormi tu, dorme **il mondo**]; „*Ti viju dintra l’uocchi ‘n autru munnu, / Ci viju ‘n autru Paravisu ‘n funnu*” - [Ti vedo negli occhi un altro **mondo**, / Vi vedo un altro **Paradiso in fondo**].

There are apheresis, elisions and syncope. It happens, that these phonetic phenomena occur in the same sentence. For example: “*Chiudi ‘a vuccuzza chi pari ‘na rosa*” - [chiudi **la** boccuccia, che sembra **una** rosa]; “*Tu sì ‘u Signuri*” - [Tu **sei** il Signore]; “*E puru ‘intra lu ‘nfiernu lu dannatu*” - [e perfino **nell’inferno** il dannato]; “*Chi m’è cnatu*” - [chi **m’ha** creato]; “*A ninna ‘e ss’uocchj tua m’ardi e m’abbaglia*” - [il sonno **di quest’occhietti** tuoi **m’arde** e **m’abbaglia**]; “*Ccu’ ‘n acu ‘mmanu è ghiutu supr’ ‘a luna*” - [con un ago in mano è andato **sulla** luna]; “*A sienti dintr’ ‘u vuoshcu Tu ‘ssa vuci?*” - [**la** senti **nel bosco** questa voce?] ecc.

The question of definite and indefinite articles in Calabrian dialect. The definite articles *il* turns into *u* or *lu*; *la* - *a*; *lo* - *u*; *gli* - *i*; *le* - *i* (cfr. De Rose 2012, 19). The example from the [Ninna di Madonna]: „*U suannu è ghhiutu a cògliari jurilli*” - [**il** sonno è andato a raccogliere **fiorellini**]; „*Mi vô lu cori*” - [mi vuole **il** cuore]; „*U’ mi guardati, cà fazzu li pinni*” - [non mi guardate, che metto **le** penne].

The indefinite articles: *un* turns into *nu* or *n*; *uno* - *nu*; *una* - *na* (cfr. De Rose 2012, 19-20). For example: „*Ti tiegnu ‘mbrazza, e sientu ‘na paura*” - [Ti tengo in braccio, e sento **una** paura]; „*Ti viju dintra l’uocchi ‘n autru munnu*” - [Ti vedo negli occhi **un** altro mondo].

The prepositions: *in* turns into ‘*n*; *con* - *ccu*; *per* - *ppe*’ or *pe*’. As for example: „*Ci viju ‘n autru Paravisu ‘n funnu*” - [vi vedo un altro **Paradiso in** fondo]; „*Ccu’ ‘n acu ‘mmanu è ghiutu supr’ ‘a luna*” - [**con** un ago in mano è andato a raccogliere **fiorellini**]; “*Chiudili, biellu, pe’ pietà, e riposa*” - [chiudili bello, **per** pietà, e riposa].

The pronouns: *che* turns into *chi*; [*per*]*ché* - *cà*; *questi* - '*ssi*'; *queste* - '*ssi*'; *questa* - '*ssa*'; *questo* - '*ssu*'. For example: „*Chiudi 'a vuccuzza chi pari 'na rosa*”; „*Cà quannu duormi tu, dormi lu munnu*”; „*Cà Tu si Diu, ed iu sugnu criatura*”; „*Pe' fari 'na curuna a 'ssi capilli*”; „*D'u cielu m'è shcoppatu 'ssu Bomminu*”.

The adverb *più* [more] turns into *chiù*: „*Mo chi ti tiegnu, nenti vuogliu cchiù*” - [*ora che ti ho, niente voglio più*]. As Abbruzzo states, *cchiù* is one of the many paragogues frequent in the old Acrian dialect (cfr. Abbruzzo 1993, 67 - note 68).

Because it is a lullaby for a small child, then there are diminutives and affectionate expressions: *occhiuzzu* - *occhiello* [little eye]; *vuccuzza* - *boccuccia* [little mouth]; *bellezza* - *bellezza* [beauty]; *zuccaru* - *zucchero* [sugar]; *locchiuzzu tunnu tunnu* - *locchietto tondo tondo* [the round little eye]; *'a vuccuzza chi pari 'na rosa* - *la boccuccia che sembra una rosa* [the little mouth that looks like a rose]; *trisuoru mia* - *tesoro mio* [sweetheart]; *mo chi ti tiegnu, nenti vuogliu cchiù* - *ora che ti ho, niente voglio più* [now that I have you, nothing I want more]; *chi ghiurillu spasu* - *che fiorellino sbocciato* [like a flourish flower]. In this way Fr. V. Padula expressed mother's love of Holy Mary to her Child.

5. BIBLICAL REFERENCES OF [NINNA DI MADONNA] AND THE FIGURATIVE LANGUAGE

The term “theological figure” indicates an historical concrete fact, which announces another; the first event is interpreted as a prefiguration of the second, and the second - as fulfilment of the first. The figural interpretation (figurative language) interprets the stories narrated in the *Old Testament* as figures (or real prophecies) of the *New Testament*. This is the fourfold meaning of the Bible: an anagogical sense, a literal-historical sense, a figurative sense and an allegorical-moral sense. The theological figure can be considered as “halfway” between the symbol and the allegory, as it places something that represents and signifies another. It can be part of the allegory considered in its broadest sense, but differs from the other allegorical forms, as the signifying thing is as concrete as the meaningful thing. Even in the case of religious poetry one can speak of the figurative language, as the proper and characteristic language, taking into account its references to the biblical stories (cfr. Auerbach 1991, 190-212).

[*Ninna-nanna di Madonna*] includes in itself some biblical references to the main truths of the faith of Christianity. And this fact allows to consider the language of the poem as a figurative language - the biblical texts (even from *New Testament*) prefigure the words of Fr. V. Padula.

Figure of the Lord (eternal *Logos*), eternally existing with God-Father. In lullaby Holy Mary recognizes herself as His creation: “*Cà lu munnu è de tia lu serbituri, / Tu si 'u Signuri. / (...) Cà Tu si Diu, ed iu sugnu criatura, / (...) Chi mà cnatu. / (...) A mamma è povarella, 'u Figliu è Diu*” - [“That the world is yours servant, / You are the Lord. / (...) You are God, and I am a creature, / (...) I was created by You. / (...) The Mother is poor, the Son is God”].

These sentences were inspired by the following biblical passages: “In the beginning was the Word, and the Word was with God, and the Word was God. The same was in the beginning with God. All things were made by him; and without him was not any thing made that was made” (John 1:1-3); “For by him were all things created, that are in heaven, and that are in earth, visible and invisible, whether they be thrones, or dominions, or principalities, or powers: all things were created by him, and for him: And he is before all things, and by him all things consist” (Colossians 1:16-17).

Figure of the Immaculate Conception³. Holy Mary says: “*D’u cielu mè shcoppatu ‘ssu Bomminu / ‘Intra lu sinu*” - [“From the heaven this Child fell / Into my womb”].

These words were inspired by the following biblical passages: “And the angel said unto her, Fear not, Mary: for thou hast found favour with God. And, behold, thou shalt conceive in thy womb, and bring forth a son, and shalt call his name JESUS. He shall be great, and shall be called the Son of the Highest: and the Lord God shall give unto him the throne of his father David: And he shall reign over the house of Jacob for ever; and of his kingdom there shall be no end. Then said Mary unto the angel, How shall this be, seeing I know not a man? And the angel answered and said unto her, The Holy Ghost shall come upon thee, and the power of the Highest shall overshadow thee: therefore also that holy thing which shall be born of thee shall be called the Son of God” (Luke 1:30-35); “And the Word was made flesh, and dwelt among us” (John 1:14).

Figure of the announcement of the Lord’s Passion: “*Pe’ ‘ssi capilli tua criscinu spini, / E pe’ ‘nchiovàri ‘ssi jidita fini, / Piensu c’ ‘a forgia mo vatti, e nun sa / Chillu chi fa. / ‘A sienti dintr’ ‘u vuoshcu Tu ‘ssa vuci? / Nun è lu vientu no chi si ci ‘nfuci: / È la cerza chi grida «’U lignu miu / Cruci è de Diu!»*” - [“For thorns Your hair grow, / And these fine fingers to nail, / I hear the forge beats, and nobody does not know / Who does it. / Do you hear this voice in the woods? / It is not the wind that penetrates by force: / The oak cries «From my wood / Cross will be for God»].

For these words, biblical passages can be assigned, as for example: “And when they had platted a crown of thorns, they put it upon his head, and a reed in his right hand: and they bowed the knee before him, and mocked him, saying, Hail, King of the Jews! (...) And they crucified him (Matthew 27:29.35); “And they clothed him with purple, and platted a crown of thorns, and put it about his head (...). And when they had crucified him [...]” (Mark 15:17.24); “And the soldiers platted a crown of thorns, and put it on his head, and they put on him a purple robe (...). Then came Jesus forth, wearing the crown of thorns, and the purple robe. And Pilate saith unto them, Behold the man! (...) Then delivered he him therefore unto them to be crucified. And they took Jesus, and led him away. And he bearing his cross went forth into a place called the place of a skull, which is called in the Hebrew Golgotha: Where they crucified him, and two other with him, on either side one, and Jesus in the midst” (John 19:2.5.16-18).

³ The catholic dogma about the Immaculate Conception was proclaimed in 1854, by the pope Pius IX, of whom the pontificate started in 1846. This Pope in the history is called and often remembered as the “Pope of the Immaculate Conception”. Fr. V. Padula wrote his poem in 1846, during his teaching experience at the Seminar, the Immaculate Conception belief was on the agenda of the theological discussion at that time.

Figure of the life after death: “*E puru ‘intra lu ‘nfiernu lu dannatu / Sta riposatu*” - [“And even in hell the damned / Is resting”]. Christmas, according to Fr. V. Padula, brings relief in suffering, also condemned in hell⁴.

Figure of the appearance of Angels at the birth of Jesus. V. Padula describes it as follows: “*Chi sîti mo venuti a fari lluocu, / Angiuli è Diu, cu’ chilli scilli ‘è fuocu? / Mi voliti arrobbari ‘u figliu miu, / Angiuli è Diu? / Cantati, sî; ma ‘n cielu ‘u’ b’ ‘u chiamati: / Aduratilu, sî; ma ‘u’ b’ ‘u pigliati: / E Tu, bellezza, ‘un fujari cu’ loru; / Si no, mi muoru*” - [“What have you come here to do, / Angels of God, with those wings of fire? / Do you want to kidnap my Son, / Angels of God? / Sing, yes; but in heaven you do not call Him: / Adore, yes; but do not take Him: / And You, Beauty, do not run away with them; / If not, I’ll die”]. In the *Bible* we can find: “And suddenly there was with the angel a multitude of the heavenly host praising God, and saying, Glory to God in the highest, and on earth peace, good will toward men” (Luke 2:13-14).

The poem, written by rather young Fr. V. Padula, further well-known journalist, essayist and socially involved writer, could be placed between the expressions of the popular religiosity (the *Ninna-nanna di Madonna*) and high-literary culture of the poet. Fr. V. Padula was an intellectual, well-trained priest, proud of his language/dialect, in-rooted in so many languages from the past of Calabria, his own homeland.

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⁴ About suffering in hell, for example cf.: Matthew 10:28; 18:9; 23:33; Mark 9:43-47; Luke 12:5; James 3:6.



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ROBERT SPAEMANN'S ONTOLOGY OF THE PERSONS AS A CONTRIBUTION TO OVERCOMING AN ANTHROPOLOGICAL CRISIS

Abstract

Robert Spaemann (1927–2018) is one of the best-known German contemporary philosophers. One of his most important books: *Persons* contains an ontology of the person that offers a synthesis of metaphysics, anthropology and ethics. The purpose of the article is to present the most important elements of this ontology and to reveal their possible relevance for current ethical problems. Spaemann's main achievement is a successful diagnosis of the present crisis of the person with the indication of the possibilities of overcoming it through an integral view of the human being.

Keywords: Robert Spaemann; person; human nature; ethics; ontology

ONTOLOGIA OSOBY ROBERTA SPAEMANNA JAKO WKŁAD W PRZEZWYCIĘŻENIE KRYZYSU ANTROPOLOGICZNEGO

Abstrakt

Robert Spaemann (1927–2018) jest jednym z najbardziej znanych współczesnych filozofów niemieckich. Jedną z jego najważniejszych książek: *Osoby* zawiera ontologię osoby, będącą syntezą metafizyki, antropologii i etyki. Celem artykułu jest przedstawienie najważniejszych elementów tej ontologii i ukazanie jej możliwego znaczenia dla aktualnych problemów etycznych. Głównym osiągnięciem Spaemanna jest skuteczna diagnoza obecnego kryzysu osoby oraz wskazanie możliwości jego przezwyciężenia poprzez integralną wizję człowieka.

Słowa kluczowe: Robert Spaemann; osoba; natura ludzka; etyka; ontologia

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DIE PERSONENONTOLOGIE ROBERT SPAEMANN'S ALS BEITRAG
ZUR ÜBERWINDUNG EINER ANTHROPOLOGISCHEN KRISE

Abstract

Robert Spaemann (1927–2018) gehört zu den bekanntesten deutschen Philosophen der Gegenwart. Eines seiner wichtigsten Bücher: *Personen* enthält eine Personenontologie, die eine Synthese von Metaphysik, Anthropologie und Ethik bildet. Der Beitrag hat zum Ziel, die wichtigsten Elemente dieser Ontologie zu präsentieren und ihre mögliche Relevanz für die gegenwärtigen ethischen Probleme zu erschließen. Als Spaemanns Hauptleistung zeigt sich eine gelungene Diagnose der Personenkrise der Gegenwart mit dem Hinweis auf Möglichkeiten ihrer Überwindung durch eine integrale Sicht des Menschen.

Schlagworte: Robert Spaemann; Person; menschliche Natur; Ethik; Ontologie

PREFACE

'Person' usually triggers rather positive associations because this term is associated with bearers of a special dignity. However, as much as this positivity is in itself uncontroversial, there can be intense debate about what the term actually entails and to which living beings it may be appropriated. There is no shortage of tendencies to deny the status of person to some groups of human individuals and to use it to refer to other beings. Such a trend is anything but harmless, because here we are dealing with fundamental achievements of intellectual history, which form something like a coordinate system for human coexistence. In the age of a new 'language confusion', in which old terms are given new meanings, it is more difficult to agree on concrete common action if one already cannot agree on common vocabulary. Therefore, it is useful to pay deeper attention to words like 'person', not only to provide conceptual clarity, but also, and above all, to put a stop to certain dangers to human beings. This is done not by merely remembering a supposed past world of unambiguity of values and concepts, but by courageously allowing challenges to come into confrontation with them. This approach is advocated by a recently deceased German philosopher who, more likely than any other in recent times, understood ethics to be profoundly connected with anthropology and metaphysics, and whose main interest was, among other things, the person. This thinker is Robert Spaemann (1927-2018).

This paper, therefore, attempts to synthesize his remarks on the person, with the aim of making these thoughts fruitful for addressing some anthropological problems of today. In a brief overview of Spaemann's life and work, the principal aim is to show why he is at all suitable as a thinker for a conversation about persons. This will be followed by a contextualization of his ontology of persons and then turned to its individual elements. Finally, the possible application of Spaemann's insights will be explained.

1. BIOGRAPHY AND WORK OUTLINE OF A DISPUTATIOUS THINKER

Robert Spaemann was a German philosopher whose immense body of work, contemporary relevance, engaging demeanor, and original way of thinking made him highly significant, reaching far beyond Germany. The main stages of his life that shed light on his philosophical work are briefly mentioned here (Kuciński 2017, 21).

Spaemann was born in Berlin in 1927. His parents converted to Catholicism with their child in 1930. The spiritual atmosphere of the parental home favored thoughtful confrontations with reality. Robert studied philosophy, history, theology and Romance philology, pondered at that time a religious vocation, but finally married Cornelia Steiner in 1950 and had three children with her. After a brief phase of rapprochement with Marxism, he turned away from socialism, especially under the impression of the conditions in the German Democratic Republic (GDR). Later he became a member of the so-called Ritter School, named after his philosophy professor and doctoral supervisor, J. Ritter of Münster. In 1952 he received his doctorate in Münster with a thesis on L. G. A. de Bonald, in which he examined the replacement of metaphysics by sociology. Between 1952 and 1956 Spaemann worked as an editor at the Kohlhammer publishing house in Stuttgart. In 1962 he completed his habilitation on the so-called 'amour pur' dispute between two 17th century bishops, F. Fénelon and J. B. Bossuet, in which the problem of the modern abandonment of teleological understanding of nature came to light. From 1962 to 1992 Spaemann taught philosophy and pedagogy at the universities of Stuttgart, Heidelberg and Munich. He often intervened in the social discussion on various topics: nuclear rearmament, abortion, euthanasia, education, etc. He took on several guest professorships and received honorary doctorates, was an advisor at the post-conciliar Würzburg Synod in Germany, and also became a member of the Pontifical Academy for Life.

Certain factors were of central importance for his intellectual profile (Kuciński 2017, 21-23). His personal experience with the Nazi era as well as his encounter with the socialist world of thought in the newly formed GDR made him, on the one hand, immune to ideologies of any provenance, but also, on the other hand, suspicious of seemingly compelling 'rationalities' of the so-called 'scientific worldview'. His skepticism, however, did not result in a turning away from the world. On the contrary, it formed the decisive incentive for the search for truth and secure knowledge. Totalitarian systems were ruled out for him already for intellectual reasons: according to Spaemann, National Socialism, for example, could not represent an attractive alternative for life due to its reductionism, because truth is always more interesting than its ideological reinterpretations (Spaemann 2012a, 34).

His openness to discussion with the intellectual world was, however, anchored in a fidelity to principles, in which he consistently held belief in the enduring importance of metaphysics and its primacy in philosophy. This can be called the

cornerstone of Spaemann's entire edifice of thought. For, in his view, philosophy should reflect on the truly 'ultimate questions' of humanity, posing questions of legitimacy and not merely solving practical problems (Spaemann 2010, 31).

The necessary orientation to the ultimate (metaphysical) questions correlated with the corresponding approach to ethical problems, which was open to deeper contexts. For Spaemann, ethics cannot be separated from metaphysics, which also reflects his criticism against any reductionisms.

Finally, his closeness to Christianity in thought is unmistakable, although he tended to resist calling himself a Christian philosopher so as not to succumb to the suspicion of confessional influence on his thought. Although he always insisted on the methodological distinction, his writings show fluid transitions between philosophy of religion and moral theology. What he confesses as a devout Catholic, he expresses using the terms of the philosophy of religion. Thus, it is not surprising that he concludes that the question of truth is inseparable from the question of God (Kuciński 2017, 35). In this way, Spaemann tries to offer Christianity once again as a plausible interpretive option to the critical intellectual world of the present.

Against this background, Spaemann is an excellent interlocutor in questions about the person. One of his most important books is entitled *Persons: The difference between 'someone' and 'something'* and is the fruit of his tradition-consciousness and at the same time present-critical preoccupation with the person. From this, Spaemann develops his philosophical reflections in other areas as well. What remains decisive here is that he adheres throughout to the affirmation of the human being, which also forms the basis of his ethics. "If one attempts to survey Spaemann's entire philosophy, one can say: Spaemann is concerned with the human being's self-understanding of himself and about himself, about his being and his acting, because the two cannot be separated from each other" (Schöndorf 2012, 316).

In this context, the problem of natural law comes particularly to the fore, because Spaemann analyzes the person in interaction with human nature. Nevertheless, he cannot simply be assigned to personalism, because Spaemann, in the name of the freedom of the philosopher, is interested in distancing himself from all simplifying classifications. However, his freedom with the zeitgeist, especially in the questions surrounding the person, together with the critique of supposed 'self-evident facts,' does not lead into criticism, but into a creative relationship to modernity, in which it is a matter of correcting its errors in order to save its genuine achievements, not least by means of Christian inspiration. "Robert Spaemann is a critic of modernity who comments on modernity both from a philosophical and from a Christian point of view" (Zaborowski 2010, 9). This is the case, for example, with regard to the concept of the subject, a main theme of the present, which, however, he would like to see coupled back to the given objectivity of nature.

Last but not least, Spaemann's philosophy of person is of great importance for the Christian intellectual world. As indicated in relation to his writings in general,

it is also evident in particular in the debate about the person that he is able to make certain Christian positions plausible in the secular world. In that sense, he provides important arguments for the rationality of Christianity that can be used in the dialogue with modernity.

2. THE CONTEMPORARY CONTEXT OF THE DISCOURSE OF PERSONS

Although Spaemann's considerations on the concept of 'person' permeate his entire body of writing, the book *Persons* is the actual synthesis of it, which allows his position to be grasped. Thus, its presentation will be essentially limited to the aforementioned book. Since it is an approach to the German philosopher's thinking about persons, only some central elements will be highlighted here which, in the author's opinion, have particular relevance for contemporary problems.

For this, the context of the discussion with the person is relevant. To say that the philosopher wrote his book as a purely polemical writing against someone or something would be rather short-sighted, even if the author himself admits at the beginning: "These reflections are prompted by a challenge to our cultural tradition and its developed understanding of humanity and human rights" (Spaemann 2012b, 4). In any case, the critical perspective towards the reductionist-functional view of the person, as it is present above all in Singerism, i.e. the thinking of the Australian ethicist Peter Singer and his followers, is unmistakable.

These are ethical designs in the empiricist tradition of John Locke, whose starting point is that "only that may claim to reality which is given to us directly in sensual experience" (Spaemann 2001, 420). The main theses of Singerism, which develops consequences for the treatment of personhood, can be summarized in Spaemann's interpretation as follows (Spaemann 2001, 419-424; Spaemann 2012b, 238; see also Wessels 2007, 624-630; Singer 2011; Hoerster 1995; Schlegel 2007; Zaborowski 2010, 198-202):

1) Rationality and self-consciousness constitute personhood. Anyone who does not currently possess these qualities cannot be called a person and cannot enjoy his or her rights. Consequently, human dignity is not identical with personhood.

2) There is no general 'nature of human being' that would decide the personhood of all specimens of the human species.

3) One becomes a member of the community of persons ('humanity') not by natural process (such as birth), but with the help of co-optation by the other members of this community.

4) If certain groups of people do not have personal status, they are placed at the disposal for eventual killing: embryos, newborn children, severely mentally handicapped and dementia patients.

In this way, Singerism reveals a crisis of thinking about persons in the present, which leads to no longer seeing the concepts of 'human' and 'person' as

congruent. It calls into question the primacy of the human that has been taken for granted for centuries. Human rights become rights of the person, the person is no longer a person throughout life, i.e. his or her life is no longer necessarily worth protecting. Those who dare to claim the opposite are accused of speciesism: an unjustified preference for their own species (Spaemann 2012b, 3). Whoever then still holds to the primacy of humans has the burden of proof.

3. SELECTED ELEMENTS OF SPAEMANN'S ONTOLOGY OF PERSONS

In general, one can say: Spaemann responds to the outlined challenges, appeared in the present due to the crisis of the understanding of persons, with the help of a metaphysically anchored and ethically effective concept of person, which is committed both to the Aristotelian substance ontology and to the dynamic relationship of persons.

His interpretation of the crisis and the answer to it is determined by other parts of his philosophy, among which the plea for a teleology of nature stands out. The author sees the roots of the problematic in the total victory of the economization of reality, to which the human person, understood as substantial 'being in itself', also falls victim: "in place of being-in-itself, inviolable in its dignity, emerges the principle of exchangeability in the utilitarian sense" (Kuciński 2017, 345). This was preceded by the modern 'abandonment of teleology' (*Enttteleologisierung*) of nature, i.e., the paradigm shift in the consideration of the nature of living beings as a whole. It is no longer the natural goals of living beings that are the criterion for understanding them, but the will of the subject using them for his purposes, who wants to take complete possession of nature. In this way, the decisive factor becomes what things are used for, and not what they are ordered to because of their own nature. The fact that it is a human subject that wants to seize the others does not change the fact that now this subject threatens to perish itself in the process initiated by it, because it is no longer sure whether there is an existing subject of thinking processes or if they are deprived of any substantial basis. In any case, the abandonment of teleology of nature also led to the detachment of personhood from the natural conditions of the human being. As a result, one can then doubt the principle that biological membership of the human race is sufficient for the determination of personal dignity. It is precisely the contradiction of this doubt, and thus the renewed view of the congruence of the human being and the person, that is the explicit goal of Spaemann's intellectual endeavours within the framework of the ontology of persons (Spaemann 2012a, 285). The logical structure of his endeavour can be presented in some fundamental concepts.

1) Person is an individual "being in itself" (*Selbstsein*)

In faithfulness to Aristotelian thought, Spaemann defines the person as 'being in itself' (*Selbstsein*). This is a substantial, ontologically independent being. As

'being in itself', person is 'the paradigm of being', an expression that plays a central role throughout the philosopher's ontology of persons: "Personality is the paradigm for being—not as 'something in general', but as transcendence of objectivity, 'being in itself'" (Spaemann 2012b, 67). The substantial character of the person also includes the fact that it exists from its own origin: "Personal existence is in the highest sense existing 'out of one's origin', something unsusceptible to external inducement" (Spaemann 2012b, 241). Finally, the 'being in itself' of the person implies an inseparable connection between subjectivity and corporeality. The body is the medium of the person's distinctive individuality and the condition of the possibility of its external appearance to others: "Since the body is the medium of existence-for-others, physicality belongs essentially to human personality" (Spaemann 2012b, 80). However, personal individuality is not seen as part of the whole, but precisely as a 'whole': "Persons are 'individuals', not in the sense that they are *instances* of a universal concept, but as the particular individuals they are, who in an individual and irreplaceable way *are* the universal. They are not parts of a larger whole, but totalities" (Spaemann 2012b, 19, emphasis in original).

2) Person is a *nomen dignitatis*

According to Spaemann, 'person' is not a 'sortal', i.e. classificatory, expression of something as something, but refers to something that is already otherwise determined. It means: person designates a group of beings with already determined properties in order to state a special status of them: "'Person' is not a classificatory term (...), identifying a particular this as such a thing. 'X is a person' does not answer the question 'What is X?', as do 'X is a human being' or 'X is a lampstand'. In order to know whether X is a person, we must first know whether X is a human being or a lampstand. The term 'person' does not identify an X as such-and-such; it says something further about an X already specified as a such-and-such" (Spaemann 2012b, 6). What is special about the concept of person is also its ethical implications. Whoever is called a person becomes the bearer of certain rights and duties: "The term 'person' has always (since Boethius) served as a *nomen dignitatis*, a concept with evaluative connotations; in the wake of Kant it became the central plank in the foundation of human rights" (Spaemann 2012b, 2).

3) Person means the 'having' of one's own nature

Spaemann's central thoughts on the person revolve around the determination of the relationship between the person and human nature. The being of persons is characterized by the 'having' of their nature: "Human beings, on the other hand, exist by distinguishing their being from their specific way of being, their specific 'nature'. Their nature is not what they *are*, pure and simple; their nature is something that they *have*. And this 'having' is their being. To be a person is the form in which

‘rational natures’ exist” (Spaemanns 2012b, 31, emphasis in original). This explains the subtitle of the whole book: person is *someone* and not *something* precisely because it can relate to its material substrate, nature: “But their way is not what they *are*, but what they *relate to*: they take it on, they carry it through, or they refuse it. That is what we mean when we say that persons are not *something*, but *someone*” (Spaemann 2012b, 72, emphasis in original). This connects to another central component of Spaemann’s ontology of persons, with which he opposes the one-sidedness of modern subject philosophy with its self-centeredness on human reasonableness and self-consciousness as the criteria of personhood. It is about vitality as a constitutive component of the person. The Aristotelian principle *vivere viventibus est esse* determines Spaemann’s thinking in many central places and so also here in the ontology of persons. The Cartesian separation of life and person by means of its replacement by subject and its linkage with consciousness has paved the way for uncontrolled domination of nature and deprived the person of its natural foundation (Spaemann 2012b, 134-136). Therefore, Spaemann strives to reconcile life, or the nature of man determined by aliveness, with his personhood. This is where the concept of freedom comes into play. It means the person’s ability to realize the ‘having’ of one’s nature, to shape it within the limits set by it: “‘having a nature’ does not make a person *independent* of human nature. Freedom is a particular way of relating to one’s nature, not of growing out of one’s nature and leaving it behind” (Spaemann 2012b, 231, emphasis in original). This specific connection of the two allows us to see freedom as ‘remembering nature’: “remembering nature means becoming aware of a presupposition of human life and freedom beyond which reasonableness and freedom would inevitably become sterile or turn into mere nature” (Zaborowski 2010, 57).

4) All human beings are persons

Spaemann’s person-ontological reflections culminate in the particularly succinct thesis that the philosopher uses for practical questions: “All human beings are persons” (Spaemann 2012b, 3). Personhood is co-origivative with being human. There is no human being that is not a person. And personhood ceases with being human because ‘person’ is an individual human being and not a property of it. This is precisely what the important sentence expresses, “There can, and must, be one criterion for personality, and one only; that is biological membership of the human race” (Spaemann 2012b, 247). The philosopher is aware of the underlying presuppositions: “One is that, although persons relate to one another a priori through mutual recognition, recognition is not an antecedent condition for being a person but a response to a prior claim” (Spaemann 2012b, 3). Consequently, it is not recognition by others that constitutes personhood; one cannot co-opt the other to the community of persons. Nor is the presence of attributes (such as consciousness and rationality) the criterion of personhood, although persons are

normally recognized by these attributes: "Another assumption is that though we concede this claim [of recognition as a person] on the basis of specific attributes, the demonstration of these is attributes is not a condition for recognition in each case; membership of the species that typically displays them is sufficient" (Spaemann 2012b, 3). These assertions allow Spaemann to defend the personhood status of the unborn, the babies, the mentally ill, and the demented, who cannot meet the very personhood criteria of Singerism because they do not possess specific attributes currently. Every human being is 'someone' from the first moment of his or her existence and not 'something' that must first develop into 'someone'. He or she is not a *potential* person, although his or her personal properties are initially only potentially present: "There are, in fact, no potential persons. Persons possess capacities, i.e. potentialities, and so persons may develop. But nothing develops *into* a person. You don't become some-one from being some-thing" (Spaemann 2012b, 245, emphasis in original). Already as an embryo, a human being has his or her ontological, inalienable personal dignity, which is identical with human dignity. And, he or she does not lose it even at the other boundary of life, when he or she no longer possesses certain personal qualities due to his or her age or illness. Similarly, human rights are congruent with personal rights.

5) Persons exist only in the plural

As the title of Spaemann's work already announces (*Persons*), one of his constant motifs is: "There are only *persons*, in the plural" (Spaemann 2012b, 2, emphasis in original). For relational openness is necessarily part of their identity: "Person is nobody for himself only. Being a person means finding yourself in a personal network of relationship" (Spaemann 2006, 39, my translation). In the relationship with the other, another dimension of the person comes to fruition: when the person has 'awakened' to his or her personhood, i.e., has developed his or her genuine characteristics, he or she is called upon to perfect himself or herself. Person can improve (or worsen) himself or herself in qualitative (not ontological) terms by his or her actions. To do so, person must transcend himself or herself, which happens when other persons become 'real' to him or her as being in itself, so that person can relate to them: "Persons are beings for whom the self-being of another is real, and whose own self has become real to another" (Spaemann 2012b, 77). Thus, the person is able to leave his or her 'central position' in the world in order to do justice to the other, because person can look at himself or herself through the eyes of the other.

The above presentation of central elements of Spaemann's ontology of persons allows (despite all necessary reduction to the essentials) the assessment that one discovers here a solid philosophical basis for various anthropological and ethical discussions of the present. It thus also becomes clear that the determination of the identity and the location of man in the universe decisively influences the reflection

on other areas of reality, because it is always this man who reflects and positions himself in relation to others. Spaemann's thinking can, of course, also be viewed critically in many places; some one-sidedness becomes visible not only in practical consequences but also, for example, in the sometimes undifferentiated way of looking at the opposing camps (Kuciński 2017, 568-569). In any case, a general merit of Spaemann for anthropology is its self-evident linkage with metaphysics, which reminds all engaged in the practical questions of life of the necessary feedback to the deeper structures of reality.

CONCLUSIONS: POSSIBLE FIELDS OF APPLICATION

In this way, Spaemann's ontology of persons can be used for the treatment of contemporary challenges.

1) First of all, Spaemann's ability to diagnose the present has a pioneering character. In the polyphony of interpretations and statements, the question of truth, the search for what was for a long time a self-evident prerequisite of all knowledge, sometimes disappears. The analysis of the crisis of the person's concept in the course of the removal of the subject, reduced to self-consciousness, from its natural biological basis forms a plausible interpretation of some problems and thus facilitates the search for a solution. Nowadays, especially in the bioethical arena, the advanced urge to hegemony by the subjectivity detached from its own nature becomes evident. Abortion, euthanasia, assisted suicide, embryo research, assisted reproduction, surrogate motherhood, organ trade, enhancement and transhumanism are fields in which it is necessary to reflect more and more intensively to what extent man is allowed to shape his own nature at will without destroying himself or herself as a free, self-aware and rational body-soul entity.

2) The motivation and unfolding of the statement: "All human beings are persons" as well as the identity of personal and human rights become an imperative for those who advocate the unlimited protection of every human being. What could hardly have been imagined only a short time ago, for example, making the killing of another human being a human right, is already a reality. Spaemann's sober analysis allows an argumentation in favor of human life as such, independent of its 'quality', to be profiled and further developed. Thereby, in the trace of this philosopher, e.g. the danger of arbitrariness in the determination of personhood, disregarding biological foundations of the human being, can be pointed out. But if the biological membership of the human species could really be convincingly presented as the only sure—if necessary for pragmatic reasons—criterion of personhood, then certain ways of dealing with the human being at its boundaries and in critical stages would have to be corrected. For this, one can well rely on Spaemann's preliminary work, because he identifies the person not merely with his or her reason, but also with body and life. A philosophical basis for this is provided by the Aristotelian distinction between reality and possibility, act and potency,

which has been obscured by Singerism. It is not the actual use of the potentialities inherent in one's species that determines one's membership in that species. For, according to Spaemann, the person is always in the act, even if he or she is not yet or no longer able to use his or her personal capacities. This perspective also allows a return to the primacy of being over acting in order to escape the performance pressure of the consumer society. This is followed by the affirmation of the rights of the weak against the superiority of the strong, because then one cannot measure the ontological quality of man by his abilities. Whether unborn or newborn, dying, seriously ill or mentally handicapped—they all deserve unconditional protection, simply because they are human beings and therefore persons.

3) The dynamic connection of person and nature, in which nature is a substrate for the unfolding of the person and the space of his or her realization, but is not available at will and brings coordinates of dealing with oneself, enables the subject-sensitive postmodernity to reconsider its own achievements without having to give them up. Spaemann shows how a demarcation of boundaries for individual freedom need not represent neither restriction nor paternalism, but rather serves its own preservation. Certain views of gender ideology, which rely on an unrestricted self-determination of human sexuality, would have to be questioned under these premises. If human freedom is only possible as 'remembered nature', then humans can and should shape their own nature, but in doing so be careful not to make themselves into another being when they have already transgressed their own ontological boundaries. In this respect, Spaemann's person-ontological approach is also suitable for pointing to the lasting meaningfulness of the use of the 'normality' predicate in the realm of the human. If there were no longer to be any criteria at all in this realm for what counts as normal, i.e. natural, the existence of humanity as we know would be questioned.

4) Last but not least, Spaemann's ontology of persons has an unavoidable affinity with Christian thought and the moral teaching of the Magisterium. When e.g. Pope John Paul II spoke on freedom as being both a gift and a task, it corresponds to what Spaemann intended with the renewed connection between nature and person. Moreover, the constant effort to combat reductionisms and dualisms in the realm of the human in favor of its integral vision comes in line with the struggle of the Catholic Church, which also tries to look at man in the light of revelation in his or her various dimensions and to bring them to a whole. Finally, the whole philosophy of Robert Spaemann develops in the horizon of the Unconditioned, which hides the truth of man and the world, so that his deep philosophical views can be an essential help for contemporary theologians.

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THE QUESTION OF THE BOUNDARIES OF COMPUTER SCIENCE

Abstract

A thesis defining the boundaries of computer science is first formulated in relation to a certain work of Stuart Shapiro. It is argued that these boundaries are determined by the properties of the mind in the real world. It is the Church thesis that determines and specifies these boundaries. Next, some issues concerning the understanding of the Church thesis will be considered such as the division of its formulations and versions. Finally, the relations among the classes of the recursive functions, algorithms, machines and computer programs will be discussed as the main theme of the article. Comments will also be made in the text on the understanding of the term 'effectively'.

Keywords: boundaries, computer science, Church's thesis, effectively, machines, mind

PROBLEM GRANIC INFORMATYKI

Abstrakt

W pracy postawiona zostaje teza dotycząca granic informatyki w nawiązaniu do pewnej pracy Stuarta C. Shapiro. Podaje się argument za tym, że owe granice są określone przez własności umysłu w świecie rzeczywistym. Teza Churcha jest właśnie tym czynnikiem, który wyznacza i specyfikuje owe granice. Potem rozważane są pewne zagadnienia związane z rozumieniem tezy Churcha jak: podział jej sformułowań na warianty i wersje. Następnie, co jest głównym tematem pracy, przedyskutowane są relacje zachodzące pomiędzy klasami funkcji rekurencyjnych, algorytmów, maszyn i programów komputerowych. W tym kontekście podany jest także komentarz na temat rozumienia terminu 'effectively'.

Słowa kluczowe: granice, informatyka, teza Churcha, efektywnie, maszyny, umysł

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¿Todo es un procedimiento?

Anonymous

1. A CLARIFICATION CONCERNING THE TITLE

The question of the limits of a science stems from the more general question connected to the limits of science as a whole. For centuries, philosophers, as well as people of science in general, have tried to make a precise distinction between science and non-science, and also between science and pseudo-science. In both cases, it has been a question of establishing their boundary. The concept of a boundary is an intuitive one since it is used in our everyday lives. It also occurs in mathematics, mainly in two versions which strictly encode two common intuitions related to the notion. The first intuition is expressed as an approximation, in the form of a sequence limit as it is applied in mathematical analysis. The second concept of a boundary is the division of an area in terms of a border as it is utilized in geometry (and topology). In this paper, I will use the intuitive properties of the border as it is used in geometry, in that it separates adjacent areas which are always present in some nonempty space.³ Therefore, for our purposes, it is crucial to determine the indicated space and to this end two methods present themselves: the first - the syntactic - takes language as its starting point, and distinguishes the language of the discipline within it; the second - the semantic - takes a class of non-linguistic objects as its operating space, and distinguishes it from a subset of objects that are of interest to the specialists of the discipline in question. The latter seems to be the more natural and appropriate of the two, and hence it will be adopted in this paper.

It should also be noted that the concept of a boundary, even in its popular understanding, is not of a relative or subjective nature, but of a normative-objective nature. Our considerations will be directed towards the field of computer science and a more precise reading of the title would be that we intend to examine the boundaries of this subject. The problem which emerges from our deliberations is both interesting and important. While only one universe or domain is usually considered in a theory, the matter is somewhat more complex in computer science. However, this is perhaps far from unusual, given that logic, for example, considers and accounts theoretically for so-called many-sorted logics, i.e., systems with many or multisorted domains.⁴ It is worth noting at this point that the question of the boundaries of computer science

³ In topology, the *explicatum* of the intuitive concept of a boundary would be the edge of a set which closes an open set. A topological explication of the concept leads to surprising cases, such as clopen sets, where the boundary is an empty set. In relation to science, Marciszewski distinguishes in the English sense between a *limit*, which cannot be exceeded, and a *frontier*, which can. This distinction is an important one and it should be emphasized that this paper is concerned with establishing the limits rather than the frontiers of computer science.

⁴ More precisely, these are the so-called *sorts* created as a result of dividing one domain into separate subsets (the so-called *many-sorted logics*). Of course, it serves merely as an analogy for the many domains that we attribute to computer science. This course of action may be employed the case of computer science in an effective manner, albeit a slightly artificial one.

is a unique one, one which differs from the traditional question of the material object, the formal object, the formal object *quo* and *quod* of this science, and it is not our intention to seek answers to this second question. This reservation is important, given that Turner & Angius, for example, mention more classes of objects in their work that computer science is concerned with than this paper does.

2. SHAPIRO'S CONCEPTION AND SOME IMPORTANT RESERVATIONS

Shapiro attempts to characterize the domain of computer science by establishing a set of all of its procedures, where a procedure as defined by the Merriam-Webster dictionary (*Webster* 1993), is "a particular way of doing or of going about the accomplishment of something." For Shapiro, procedures "are not natural objects," but rather "natural phenomena that may be, and are, objectively measured, principally in terms of the amount of time they take (for those procedures that terminate), and in terms of the amount of resources they require"⁵ (Shapiro 2014, 2). An implication of this understanding is that he believes computer science to be a natural science. Such an understanding of the domain of computer science is not common. However, given its imprecise nature it requires further analysis. The definition of a procedure provided by Shapiro includes the term "a particular way of doing," which establishes the proximal type for procedures (*genus proximum*). It should be noted that the way of doing things is generally different from the procedures themselves. What can be empirically observed and investigated are procedures, rather than ways of doing, and while the former are natural phenomena, the latter are not. Proceedings are more of a realization or an exemplification of a way of doing things. This distinction is linked to traditional philosophical problems - universals vs. individuals, or types vs. tokens. Instead, the ways of doing things (procedures) are abstract objects rather than the natural phenomena that Shapiro desires. Of course, there may be doubts whether such an interpretation is appropriate, and whether the interpretation of the way of doing something as a set of physical acts/actions that result in a specific course of a certain physical process should be disallowed. As a result, we have formulated the outline of an argument against the latter interpretation.⁶

- Let us consider *a way of doing something to accomplish something*; let us call it W1, and its repetition W1';
- A second *way of doing something to accomplish something* is required for our purposes; let us call it W2;
- The three ways, W1, W2, W1' are different from one another since, as natural phenomena or physical objects, they (by definition) have different spatial and/or temporal parameters;
- Additionally, let us assume that W1, W1', and W2 add natural numbers;

⁵ All citations are from Shapiro's original article in English.

⁶ Discussing this issue in more detail, and similar issues from the rest of the work, would require much more space than the authors have at their disposal and they are aware that this issue requires further investigation.

- In order to state on the basis of the empirical observations of $W1$, $W1'$, and $W2$, that they are somehow 'identical', it is necessary to refer to something that instantiates itself primarily in $W1$, $W1'$, and even $W2$, which is common to them all and has at least a mental character, or is some kind of an abstract object.

For a better understanding of the outline presented above, one may say that "any characterization of computer science must contain some basis which allows the identification of different implementations of a given algorithm, and any such basis requires an abstraction beyond the purely empirical."⁷ The above argument should show that the experimental nature of computer science is doubtful if we were to deduce it only from the ways of doing things (as natural phenomena). The argument contradicts Shapiro's claim that the subject of computer science are procedures, understood as a subclass of 'ways of doing' (the third premise of the argument is false). On the other hand, the partially experimental character of computer science, as well as its extent, which we will present further, can be deduced from research on those doings (proceedings) that can be investigated intersubjectively, since they are of an empirical nature.

3. A DESCRIPTION OF THE RELATIONS BETWEEN SOME OF THE OBJECTS OF COMPUTER SCIENCE

A more detailed description of this matter allows us to draw interesting conclusions regarding the boundaries of computer science. Let us consider at least five types of objects from an ontological point of view, all of which are certainly related to computer science.

- A. Functions (effectively) calculable (Func);
- B. Algorithms (ways of doing) (Alg);
- C. Computer programs (in a certain aspect, ways of doing) (Prog);
- D. Realizations (doings) (Real);
- E. Machines (Machine).⁸

The ways in which these objects exist, or their ontological status, differs. Let us first note that, generally speaking, the existence and nature of such objects may be a) Abstract; b) Mental; c) Physical.

Traditionally, and for our purposes, three main views are typically discerned on the basis of this list which supply the indicated ontic status of objects:⁹ platonism - logicism (a.); conceptualism - intuitionism (b.); nominalism - formalism (c.).¹⁰

⁷ We are grateful to the careful reviewers of this paper for this observation.

⁸ We understand the term 'Machine' here very broadly and we include theoretical machines, which are actually programs (sometimes program-scripts), but also all devices called computers, which allow one to execute program-scripts. This is the so-called *hardware*.

⁹ First, the traditional name was given, followed by a more contemporary name for these philosophical views.

¹⁰ Platonism, for example, does not exclude the existence of b. or c. objects, nor does conceptualism exclude c. objects, but rather they do not necessarily require their existence.

From our list, theoretically speaking, the objects (Func) and (Alg) could be assigned to types a., b. or c. However, the ontological status of the computer programs (Prog), (Real), and (Machine) is more limited. There are some differences among all the indicated classes, e.g., (Prog) contains only artifacts, similarly to (Real) and (Machine) - which consist *almost*¹¹ exclusively of artifacts, unlike the (Func) and (Alg) classes. Secondly, the objects in the classes (Func) and (Alg) correspond to *intuitive concepts*,¹² unlike the other classes. (Eden 2007, 4-5) distinguishes two senses of the term program: a program-script, understood as a “well-formed sequence of symbols in a programming language,” and a program-process - a “process of computation generated by ‘executing’ a particular program-script” (otherwise referred to as a thread, task, or bot).

Do these two different meanings point to two different types of objects that are defined as programs? It is unclear how this distinction relates to the characteristics of the three paradigms of computer science: rationalist (RAT), technocratic (TEC), and scientific (SCI) (cf. Eden 2007) These refer, among other things, to the three ways of understanding programs as abstract objects, syntactic objects, and mental objects. According to our classification, Eden’s program-scripts belong to the class (Prog) and are of the type (c.).¹³ The above considerations show that the philosophical standpoint adopted by the researcher is important when considering the ontology of computer science. The richer the ontology assumed at the outset, the more that can be said about the entities that belong to the ontology of computer science. In this paper, therefore, precisely such a rich Platonic ontology is assumed. For example, naturalism, in its extremely ontological version, will have difficulty describing and explaining certain phenomena.¹⁴ In the case of naturalism or any other form of reductionism, abstract beings such as functions or algorithms will have to be imitated by means of the beings which the ontology permits. The philosophical stance adopted here allows for the distinction between the three ‘layers’ of reality already indicated: physical reality, mental (conceptual) reality, and abstract (ideal) reality. These object layers differ significantly in regard to the properties of the objects they contain. Functions defined over natural numbers constitute a set which, as we know from set theoretical considerations, is of size the power of the continuum. In it, we distinguish a subset of calculable functions, one which is infinite and countable due to the finiteness of their descriptions (cf. Kielkopf 1978). The second issue is that the class of all algorithms is also very extensive, as shown in the figure below derived from the work of Burgin, where the

¹¹ This means that they also contain natural objects, such as some physical processes that can be said to calculate. However, this is a matter that goes beyond the scope of this work.

¹² This term is partially technical because it was used in the original formulation of Church’s Thesis.

¹³ The literature often speaks of the dual nature of computer programs - of a concrete and an abstract ontology. Parsons allows such objects to exist, calling them quasi-concrete, and gives sentence-types as an example. Parsons (2008, 33-39).

¹⁴ For reasons of space, we limit ourselves here to merely flagging this potential problem rather than exploring it in more depth

different types of machines/automatons corresponding to the sets of algorithms are shown (Burgin 2005, 250).

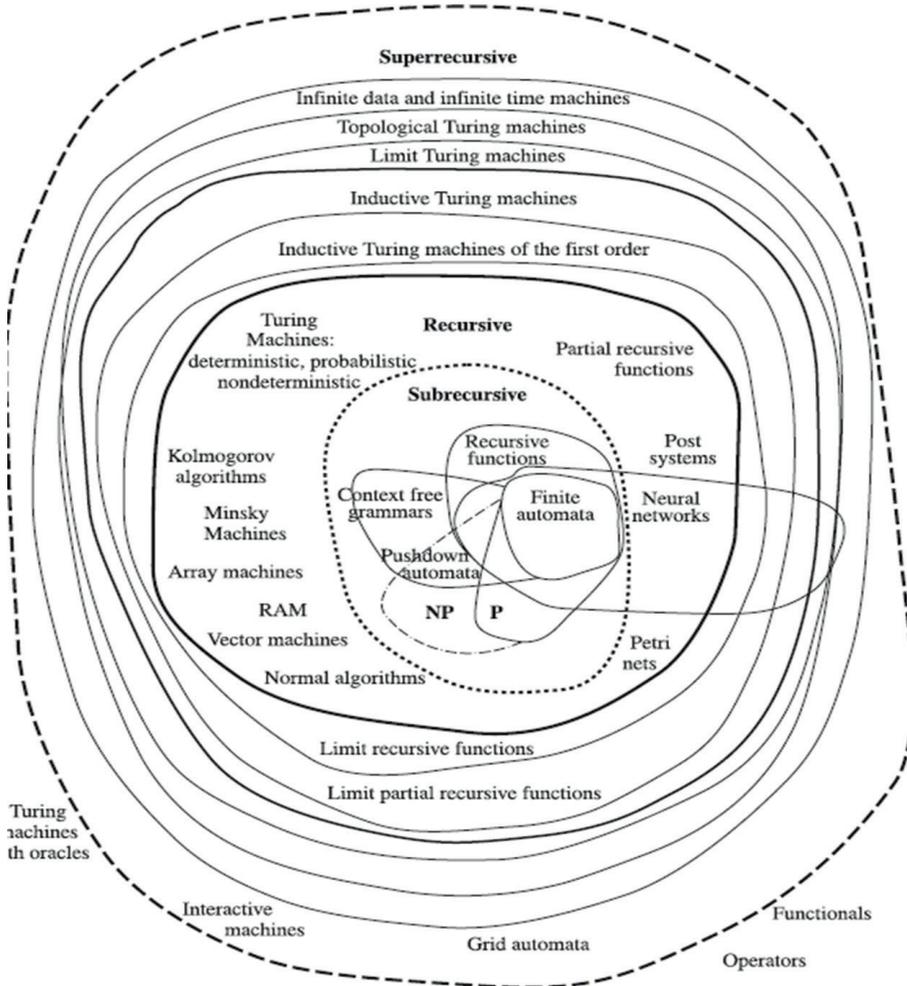


Figure 6.1. Algorithmic universe.

It seems that the cardinal number of this class is countable, although there is no proof here.¹⁵ The task is to distinguish, within the set of all functions defined

¹⁵ Here we supply a proof of a similar proposition (for which we are indebted to David McCarty): If one includes Turing machines alongside oracles (as in the diagram above), then there are an uncountable number of functions thus computed, since there are as many oracles as there are sets of natural numbers. The question of the number of this class of algorithm is indeed a peculiar one. Another peculiar counterexample to this countability would be that one syntactic description can correspond (uncountably?) to an infinite number of different interpretations, but this is a very specific problem and, in our opinion, inconvenient one, as it is in opposition to the usual approach to these matters. It may also be a category in the sense of category theory.

over the natural numbers, the class of computable functions that are of interest to computer science. A similar problem arises with the class of all algorithms.

4. CHURCH'S THESIS AS THE FOUNDATION OF COMPUTER SCIENCE

We will use Shapiro's idea, which refers here to two fundamental principles of computer science: the Church-Turing Thesis (CT) and the thesis of analyzability (TA), which states, "[E]ach procedure can be analyzed by means of basic actions and a set of control structures."¹⁶

Shapiro's formulation of CT requires a sort of clarification. Church's Thesis itself was formulated by Alonzo Church in the abstract to his article "An Unsolvable Problem of Elementary Number Theory," which was published in 1936. The formulation of the thesis by Church himself is ambiguous and should be explained; cf. (Olszewski 2009, ch. 5). The strongest version of the CT expresses the 'identity' of two concepts taken by Church as definiendum and definiens (CT1).¹⁷ The following theses are weaker: concerning the equivalence of the two concepts (CT2) and the identity of the extensions of the concepts (CT3). The relationship between them is such that CT1 entails CT2 and CT2 entails CT3. CT has a structure that can be generally written as:

[Schema of CT] $(I = S)$

where 'I' is an intuitive concept, 'S' is an exact concept, and the sign of identity is to be understood as ambiguous, depending on the interpretation of CT as either:

- a) the identity of the concepts;
- b) the equivalence of the concepts;
- c) the identity of the extensions of the concepts.

Following Kreisel, we distinguish between three *versions* of CT by replacing 'I' in the general schema of CT: the intuitive concept of an effectively calculable function (E), the concept of a calculable function (F) by a physical process, and the concept of a mechanically calculable function (M). Therefore, we have three versions:

- I. human version ($E = R$);
- II. physical version ($F = R$);
- III. mechanical version ($M = R$).

However, further variants of CT are those formulations in which the right side of the identity is replaced by an alternative concept from one of these versions. For example, when we replace R with the concept of a function calculable by a Turing machine (T), we obtain the human version variant ($E = T$), which constitutes the Turing Thesis. Shapiro writes that the Church-Turing Thesis "implies that

¹⁶ These two principles are formulated in the work of Shapiro entitled "Some fundamental principles of computer science". This means that, in his opinion, there may be other such fundamental principles.

¹⁷ Church understood CT, at least at some point in time, as a definition. The issue of the 'identity' of concepts is a complicated one and has been considered in Olszewski's work, sections 5.1.4 and 5.1.5. It is most likely a definition of the analytical type and therefore has the property of logical value.

a computer can carry out any procedure that any mechanistic device, manufactured or naturally grown, could carry out” (Shapiro 2014, 2).¹⁸ This is true, but it pertains to the physical and mechanical version of CT, as well as the additional (logical) premises. The empirical nature of CT should be clearly discerned from the above. On their left side, all three versions contain concepts referring to the actual state of the universe inreside, and, more precisely, to the (computational) capabilities of the human mind, the (computational) capabilities of physical processes, and mechanical procedures (understood in the general sense, also allowing for theoretical machines). This matter is quite complicated and would require more consideration. Some aspects have already been presented in an earlier work by (Olszewski 2009). At the present moment, all versions of CT are considered to distinguish a well-defined set of functions identical to the class of (partially) recursive functions R in the Func class of all functions defined over the natural numbers ($(R \subset \text{Func}) \wedge \neg(R = \text{Func})$). This is a crucial determination, since the findings in regard to class Alg are derived from it, as the following condition shows.

A. $a \in \text{Alg}$ if and only if $\exists f \in R$ (algorithm a calculates f)

which distinguishes the well-defined set of algorithms Alg from the broader class of algorithms.

The next step is to distinguish a class of computer programs, i.e., a set Prog , on the basis of the class Alg . Then, the classes Real and Machine are to be distinguished on the basis of Prog , in the following manner.

B. $p \in \text{Prog}$ if and only if $\exists a \in \text{Alg}$ (p realizes a);

C. $r \in \text{Real}$ if and only if $\exists p \in \text{Prog}$ (r is a process of computation generated by the execution of p);

D. $m \in \text{Machine}$ if and only if $\exists r \in \text{Real}$ (m is the appropriate operational environment for r) (Eden 2007, 139).¹⁹

As can be seen from the above considerations, the key issue in any version is the CT case, which distinguishes a fundamental class of functions that are effectively calculable. Kleene has already drawn attention to the phenomenon of the extraordinary stability of this basic class. Its stability is based on the fact that no matter how we try to characterize a class of effectively calculable functions in the intuitive sense, we always arrive at the class R . Due to this class, we can determine the appropriate algorithm class (Alg), then the program class (Prog), and, consequently, the class of machines (computers) (Machine) and realizations (Real). Correlations between the (R), (Alg) and (Prog) classes are not one-to-one, because e.g., one function can be calculated by many algorithms, and an algorithm can be executed by multiple programs.

¹⁸ Shapiro rightly makes mention of a “mechanistic device (...) manufactured or naturally grown”, because a computational machine can really be an artifact or something natural. This is precisely the complex thread I mentioned in the footnote when writing about machines as mainly artifacts.

¹⁹ Eden writes: “The term program-process is thus reserved to that entity which is generated from executing a program-script in the appropriate operational environment”. These can also be other real objects, such as the procedures we have assigned to Shapiro.

This situation can be expressed equivalently in the form of a single sentence: $m \in \text{Machine}$ if and only if $\exists r \exists p \exists a \exists f ((f \in \text{R}) \wedge (a \in \text{Alg}) \wedge (p \in \text{Prog}) \wedge (r \in \text{Real}) \wedge (\text{algorithm } a \text{ calculates } f) \wedge (p \text{ realises } a) \wedge (r \text{ is a process of computation generated by the execution of } p) \wedge (m \text{ is the appropriate operational environment for } r))$. Comparing, for example, class R with class Alg, one can write: $\forall f \exists a (f \in \text{R} \rightarrow (a \in \text{Alg} \wedge a \text{ calculates } f))$, similarly for sentences expressing relations between the remaining sets of objects from the above list. The very simple fact that the machine belongs to the Machine class, as it seems, has strong ontological commitments, expressing this in Quinean terminology. The same is to be expressed in a simple phrase: CT defines the boundaries of computer science. For this to be the case, it would be necessary to add to the additional equivalences listed above: $f \in \text{R}$ if and only if $\exists f \in \text{E}$ (f is effectively calculable in an intuitive sense by the human mind (Subject)).²⁰

5. A BRIEF DIGRESSION ON THE MATTER OF EFFECTIVENESS

What is of crucial importance here is the proper understanding of the *effectiveness* of a function, i.e. its *executability*, *producing a result that is wanted* etc.²¹ It is not the property of the function itself, but the property of the computability of a function that is assigned to functions by the mind (*intellectus*) of the computing person. The phrase “effectively calculable function” can be abbreviated as EC(f) using the following abbreviations: E - effective; C - calculable; and f - function in natural numbers. It would seem that the following equivalences are at play: EC(f) ($E \wedge C$)(f) \equiv ($E(f) \wedge C(f)$). If this were the case, we would have an $EC(f) \rightarrow E(f)$, which in general does not have to be the case, particularly when we consider the fact that, according to the Merriam-Webster Dictionary, effective means *created (ready)*, *specified*, *final* and *intended* (effect) and, when applied to the recursive function of Ackermann, it reveals that this implication is false. In reality, the Ackermann function effectively calculable, which means that while one may theoretically calculate all of the values of its arguments separately, in practice this

²⁰ The manner in which these considerations are presented utilizes formalism. Are they strictly necessary here? We have chosen to include them for two main reasons: firstly, these formalisms are elementary in nature and help to understand the point being made; secondly, their use is not entirely unfounded, since the variables related to quantifiers, for example, run according to well-defined classes of objects.

²¹ The Merriam-Webster Dictionary (on-line) supplies the following definitions for *effect* (here only terms important for our deliberations are included): 1. a change that results when something is done or happens; 2. an event, condition, or state of affairs that is produced by a cause; 3. a particular feeling or mood created by something; 4. an image or a sound that is created in television, radio, or movies to imitate something real. The same dictionary gives for *effective*: 1. producing a result that is wanted; 2. having an intended effect of a law, rule, etc.; 3. in use; 4. starting at a particular time. The fuller definition for *effective* (the first known use comes from the 14th century): 1. producing a decided, decisive, or desired effect <an *effective* policy>; 3. ready for service or action <*effective* manpower>; 4. actual <the need to increase *effective* demand for goods>; 5. being in effect: operative <the tax becomes *effective* next year>.

is ineffective since relatively small arguments are accorded very large values. For clarity's sake, this should be briefly restated as it is genuinely shocking for some: there are functions which can be effectively calculated but they are ineffective if we adopt the dictionary definition of the term.

6. EXCEPTIONS ACCORDING TO SHAPIRO

In Shapiro, we can find an overview of operating systems and heuristic procedures (Shapiro 2014, 1). He believes that they do not fall under the dictionary definition of 'algorithm,' because the former do not converge, and the latter "do not guarantee the correct answer," even though they are of interest to computer science. It seems that this viewpoint may be viewed with some degree of doubt, since algorithms that do not converge are well-defined algorithms, and they are supposed either to fail to converge or stop as a result of a special command dependent on the will of a person. This issue connected with operational programs is encapsulated succinctly in the following work (Enderton 2010, 6): "One person's program is another person's data." The issue of heuristic procedures is somewhat more complex. Harel uses the term 'heuristics' and defines it as 'practical rules' which permits us to remove from the work of the algorithm the task of searching for cases that are unreliable from the point of view of achieving the goal for which the algorithm was designed. To this end, he mentions programs playing chess as an example of the use of heuristics; cf. (Harel 2000, 366). Let us consider a situation where we have program P with a very high computational complexity, which realizes a certain objective (goal). Such a program is usually practically non-computable, i.e., it cannot be used, sometimes even for low input values, because the time needed to wait for the result (output) is very long. It is often connected with the number of possibilities that the program has to check, and their number has as an exponent, e.g., the number 1000 (cf. Harel 2000, 366). However, when an intelligent person (specialist) analyses the operations of a program, they may realize that the program sometimes searches through cases where, for example, a solution will definitely not be found or will most likely not be found. Such an observation of the operation of the program is of a practical nature, but more importantly, it is of an *intentional* nature, because it refers to the content (sense) of what the program does, and not only to the purely syntactic manipulation of symbols that constitutes the basis of the way in which algorithms are defined.²² After the formulation of several such important heuristics in reference to P, it is possible to modify the program itself by providing it with the detected heuristics, obviously using the requisite programming language. The result is a program P', a version of the earlier P program. It is a well-written program, i.e., an element of the Prog class, and it calculates a certain algorithm. However, from the point of view of the purpose for which P has been written, P' has some flaws in that it does not guarantee an

²² This is a fascinating issue that requires a separate and comprehensive study.

optimal solution and sometimes it will not provide a solution at all, even though such a solution exists for P . Looking at heuristics and heuristic procedures from the perspective of the theory of the mathematical subject (Olszewski 2009, ch. 2) where the Platonic Subject,²³ the Transcendental Subject, and the Empirical Subject are different, it can be said that heuristic procedures are an attempt by the Transcendental Subject to provide the Empirical Subject with the possibility of making a quasi-calculation of what is essentially incalculable. One may also venture the assertion that for any given program P there exists a heuristic program (let us call it the intentional program P') such that, thanks to P' , we will obtain essentially the same as program P .²⁴

7. THE SECOND FUNDAMENTAL PRINCIPLE OF COMPUTER SCIENCE

The second fundamental principle of computer science, according to Shapiro, is that “[w]e can analyze any procedure into its basic actions and a set of control structures, which specify how the basic actions are combined.” (Shapiro 2014, 2). He refers to the work of Corrado Böhm, and Giuseppe Jacopini (1966), in which a general formulation of computer science was made where a certain calculation model is indicated in which three control structures are listed in addition to the basic activities, and by means of which every calculation procedure can be produced (Shapiro 2014, 2). The adoption of a given set of basic actions, which Shapiro does not list, is crucial given that it may lead to changing the system’s calculation power. The control structures are the following: “1) perform one operation, then the next, then the next, etc. (sequence - one after the other; added by me A.O.), 2) select one operation or another, depending on a certain condition (selection - choice; A.O.), 3) loop: repeat the operation as long as a certain condition is fulfilled (loop - repeat; A.O.)” (Shapiro 2014, 2). Odifreddi discusses Böhm and Jacopini’s claims in the context of flowcharts (diagrams of sequences of actions) as well as the problem of whether unstructured or structured flowcharts are more convenient or beneficial. By virtue of Wang’s findings, we know that any recursive function is calculable in the context of flowcharts, and that the reverse is also true. However, Böhm and Jacopini evidenced an important claim which was previously uncertain, as a result of which it emerges that both types of flowcharts calculate the same class of functions (cf. Odifreddi 1989, 70). To summarize this fragment, it can be said that flowcharts are equivalent to any theoretical model of computability, which is itself an important result. One may also wonder why Shapiro attaches such importance to this calculation model, in addition to the one indicated on the basis of Odifreddi. Perhaps the following argument could be used to clarify this point:

- If something is an object of computer science, then it has a counterpart in the form of a partially recursive function (from CT).

²³ The calculation is an expression of some ignorance, therefore the ideal Platonic Subject does not calculate. He simply knows the value of the function for the argument.

²⁴ Perhaps this one of the variants of the famous $P = NP$ problem

- Each value of a partially recursive function can be calculated with a single use of the operation minimum applied to a primitive recursive function (from Kleene's Normal Form Theorem).
- The operation minimum is a certain type of loop; the primitive recursive functions are defined by their composition (sequence) and recursion (kind of selection + iteration) (from the relevant definitions).
- Therefore, every computer object can be obtained somehow with the help of the control structures listed by Shapiro.²⁵

8. CONCLUSIONS AND A WORD IN CLOSING

Finally, it is worth noting that a certain group of computer scientists is trying to extend the Func class of computable functions by presenting algorithms that are intended to compute functions outside of the Func class, or attempt to show machines that can calculate such functions.²⁶ Until now, these intentions have not resulted in practical applications, although until a proof for Church's Thesis is given, we will never have the certainty that this is impossible. This also complicates the epistemological situation of the fundamental problem of the theory of undecidability - the halting problem - as formulated by Turing.²⁷ Here, we distinguish between the general problem of halting and the problem of halting in Turing. The general halting problem for Turing machines is the question: "Is there an effectively calculable procedure in the intuitive sense that decides the halting problem for Turing machines?" The halting problem for Turing machines is as follows, "Is there a Turing machine which decides the halting problem for Turing machines?" The answer to the second question would be a precisely proven theorem about Turing machines. However, the answer to the general question of the halting problem is not known without assuming the truth of Church's Thesis. The halting problem plays a fundamental role in the theory of undecidability, since the undecidability of many problems is demonstrated indirectly by reducing the issue of their decidability to that of the halting problem. That is probably why supporters of the expansion of the (Func) class most often begin by trying to demonstrate whether the halting problem can be determined or not. In conclusion, CT seems sufficient to establish the boundaries of computing and computer science for the time being. However, there is a considerable amount of pressure to transcend these boundaries. There are scientific fields, such as number theory, where similar pressure, sometimes based on practical demands, led to the discovery of other objects such as complex numbers, which have proven of benefit to science in general. Certainly, transcending the current boundaries of computer science would be akin to a scientific revolution. *We need only to keep an open mind.*

²⁵ We owe this argument to J. Mycka.

²⁶ This applies to a sizable group of people, such as Burgin.

²⁷ The Polish logician, Józef Pepis, wrote about the uncertainty of the undecidability of first-order logic in his PhD. dissertation in the 1930s. He felt it was uncertain because it depends on the correctness of Church's Thesis, which he held is empirical in nature.

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PRINCIPLES, RULES, DIFFICULTIES AND DILEMMAS OF INTERPERSONAL COMMUNICATION IN THE SOCIAL WORK

Abstract

The article presents the selected principles of interpersonal communication in social work, paying attention to communication rules referring to active listening, choosing the right questions, or adapting the language to the interlocutor. The authors devoted a special place to communication awareness and the look at interpersonal communication as a meeting with an individual, a unique and exceptional person. In addition to the selected communication principles, the authors have also presented the selected dilemmas and communication difficulties that determine the quality of the conversation, its course and effects.

Keywords: interpersonal communication, social work, communication awareness, listening

DYLEMATY, TRUDNOŚCI I ZASADY KOMUNIKACJI INTERPERSONALNEJ W SFERZE PRACY SOCJALNEJ

Abstrakt

W artykule przedstawiono wybrane zasady komunikacji interpersonalnej obowiązujące w pracy socjalnej, zwrócono uwagę na reguły komunikacyjne odnoszące się do aktywnego słuchania, wyboru odpowiednich pytań czy dostosowania języka do rozmówcy. Szczególne miejsce

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autorki poświęciły świadomości komunikacyjnej oraz spojrzeniu na komunikację interpersonalną jako na spotkanie z indywidualnością, osobą wyjątkową i niepowtarzalną. Obok wybranych zasad komunikacyjnych autorki przedstawiły również wybrane dylematy i trudności komunikacyjne, które determinują jakość rozmowy, jej przebieg i skutki.

Słowa kluczowe: komunikacja interpersonalna, praca socjalna, świadomość komunikacyjna, słuchanie

INTRODUCTION

A social worker in the practice of his/her professional life carries out many important and difficult tasks by performing the function of an adviser, teacher, mediator and negotiator. Each of these roles requires a social worker to use a variety of communication tools and skills that allow creating the atmosphere of trust and security. A social worker as a representative of the community “encourages and gives a sense of security. S/he makes the hospitalization patients feel full-fledged members of society. This way, help becomes solidarity, and solidarity is closely related to sensitivity” (Kucharska 2015, 96). This sensitivity, creating understanding, comprehension, a sense of bonding, acceptance and security is based on the communication process, which principles and their observance are determined by the quality of the social worker – customer relationships, but also the customer – customer’s family relations, a person seeking help – a person outside the family. The importance of communication skills and the efficient use of communication tools is visible not only at the level of helping a person in need of support and understanding, but also in the aspect of building a bridge between such a person and his/her relatives – family, the closer and further surroundings. A social worker can, for example, explain the rules of communication between the patient and his/her family” (Kucharska 2015, 97), and thus “help the dying and the family in communication in the atmosphere of death” (Kucharska 2015, 97) and disease.

Therefore, on the one hand, communication is used to build a person seeking help – social worker relationship, and on the other hand, the social worker acts as a teacher who teaches how the people in need should communicate with the environment in crisis situations, and indicates the communication path that should be followed by relatives of people in need, the sick, to give them support and understanding. Considering the importance of communicative competences on which help for the people in need and their families is based, it is worth paying attention to the basic principles as well as communication dilemmas characteristic of the process of social assistance and work. The aim of the article is to present basic principles and communication dilemmas in the aspect of interpersonal communication, the qualitative dimension of which serves to create relationships, show understanding, support and empathy.

1. INTERPERSONAL COMMUNICATION IN SOCIAL WORK

Direct communication – interpersonal communication is the basic form of communication in the sphere of social work. “Ordinary” conversation can bring “extraordinary” results and be an “extraordinary” source of help for those in need, for people in difficult life situations, and also support their relatives. This communication based both on the word and non-verbal behaviour allows, on the one hand, to provide the people in need with relevant information, knowledge, support, understanding or empathy. Therefore, it should be considered as a tool for social workers in the sphere of helping the ones in need, in the sphere of building a bridge of understanding, but also as a tool to understand the situation, in which the given person has found himself/herself. On the other hand, it should be remembered that a social worker also becomes a teacher who shows the relatives how to communicate with a person in need of help. S/he teaches customers how to communicate with the environment. In this aspect, communication becomes a challenge, because teaching others the communication rules is not easy and simple. Individual communication styles, emotions, health or cultural differences should be taken into account, which often “disorganize work, give rise to conflicts, and cause prejudice” (Bielecka 2017, 161). All of the factors mentioned above determine the quality of communication, affecting its effectiveness and efficiency.

Considering the above, one should agree with the statement that “in order for the social worker to be able to communicate well with the supported person, knowledge in the field of communication psychology turns out to be useful” (Długi 2012, 54), which also becomes useful in the face of the teacher’s role – which is played by a social worker, for example, teaching the family to communicate with a sick or dying family member.

Of course, interpersonal communication is a challenge in helping people who are in crisis. It should be remembered that although communication rules facilitate efficient exchange of information, it is necessary to take into account issues concerning the individuality, uniqueness and distinctiveness of each interlocutor. As observed by M. Jurewicz, “individuality of man is the result of the clash of social situations, roles, patterns, expectations, collectivity with the personal choice and involvement of the person in it. This is always a specific, personal reaction of the individual to situations, problems and social experiences” (Jurewicz 2016, 14). Each person is different, has his/her own unique style of communication, own communication experiences that determine the current and present way of communicating with the environment. It should also be remembered that customers expect different types of help. It is important for the interpersonal communication to be a tool for a social worker to effectively and accurately assess these needs and expectations of the recipients of help. As noted by B. Długi, “it is important that customers receive what they need and now what we can offer them at the moment. Sometimes the client needs to be heard or has the need to «talk

it out», and we offer financial help because it falls within the criteria and we have the resources. Such actions usually result from a disturbed relationship between the client and a social worker who often works under time pressure. Here, the relationship was not established, the actual needs of the client «were not read» well, so s/he has no chance to change his/her situation” (Długi 2012, 58).

Considering the above issues, we should consider the problems, dilemmas and communication difficulties that social workers have to deal with in their work more deeply.

2. INTERPERSONAL COMMUNICATION – DILEMMAS, PROBLEMS AND DIFFICULTIES

The tasks performed by social workers are often associated with making difficult decisions, achieving goals under stressful conditions, dealing with conflicts, misunderstandings and dilemmas. “The profession of a social worker is a typical «profession of the middle», in the very centre of various dilemmas. One can talk about a widely understood conflict of interests, opinions, perspectives and positions in the area of service provision” (Bieńko 2012, 97).

In the context of communication, one can talk about certain dilemmas and difficulties associated with the use of specific means or communication tools to help and support people in need. What tools will be appropriate, what form of communication should be chosen for specific interlocutors and specific communication situations? Social workers have to answer these questions.

However, these questions are not easy, because the answer to these types of questions may depend on the quality of the customer relationship being built, the atmosphere of the conversation being built, the amount of information obtained and the help measures adapted to them. Strong emotions, stress, fatigue, time pressure constitute another obstacles in the sphere of communication with clients. Putting too much focus on speaking, presenting your reasons, point of view, decisions, ideas to solve the problem may be the difficulty in communication instead of careful listening, making efforts to understand the other party’s point of view on a given problem. The lack of reaction to what the client says or the wrong interpretation of his/her words and the incorrect feedback make it difficult to understand each other and reach an agreement, as well as to adjust the right types of help to the client’s needs. In a situation where each of the parties tries to present their reasons, not caring what the other side wants to convey, a communication situation arises, which can be called parallel, which consists in “that every communicator tries to force his/her own thought or vision at any price, not responding to what the other person is saying or experiencing. The other one, in turn, does the same, trying to convince the first one to his/her own reasons, not responding to his/her arguments. Then we deal with the so-called parallel communication, but against each other. It is a situation in which both partners communicate according to one’s own plan, own vision, not paying attention to what the other person is saying.

This type of communication can take a long time and eventually lead to a sharp conflict when one of the parties realizes that the other person does not listen to him/her at all” (Miąso 2016, 270). Adjusting the course of the conversation to the previously developed course of the conversation, establishing a specific vision of conversation with clients, without paying attention to the fact that each person is different and each conversation may be different, may lead to the lack of effective communication, misunderstandings and mistakes in the assessment of the problem. Of course, the adopted scheme and vision of conversations with clients may be helpful, however, it should be remembered that in the qualitative terms of interpersonal communication – and this is how one should look at the process of communicating with clients in social work – every interlocutor is unique, an individual, and meeting with him/her can bring new communication experiences, be considered also in the light of communication lessons – acquiring new knowledge and information. Interpersonal communication is, after all, a two-way process – so when transmitting information, the sender becomes the recipient of messages that can help him/her understand the other person, his/her situation and problem, but also help in adapting the appropriate communication tools and means of assistance, which are expected by the person seeking support. “It is important that customers receive what they need and not what we can offer them at the moment. Sometimes the client needs to be heard or has a need to «talk it out», and we offer financial help because it falls within the criteria and we have the means” (Długi 2012, 58). Interpersonal communication should therefore be treated as a tool that when properly and appropriately used allows to accurately assess the needs of customers and adjust the form of help to their expectations.

When considering the issues regarding communication difficulties and dilemmas, it is worth emphasizing the importance of some feedback, such as showing support or empathy. In the sphere of empathy, compassion, striving to understand the client and identify with his feelings and situation, one can speak about a specific dilemma faced by a social worker. On the one hand, in order to talk about helping another person, attention should be paid to empathy, but on the other hand, it should be remembered that too strong emotional involvement in a specific situation, in which the client found himself/herself is not helpful and beneficial. As the paradoxes of professional action, M. Szpunar includes emotional commitment to solving problems. “The difference of these exposures is a natural consequence of the fact that one of the parties is the subject of the aid activity, concerns it and struggles with the problems being the subject of the action” (Szpunar 2010, 64). The author refers own considerations to the tasks performed by family assistants, noting that in their work “multi-problem families, as the name suggests, are entangled in emotionally difficult life situations, which often cause suffering of individuals. In these situations, the assistant on the one hand, emphatically approaches to accompany the family, on the other hand, s/he cannot, or even should not level this commitment with the emotions of people directly

affected by this. Such an entry into the biography of families enforces a holistic view of the client's life, but it will never be balanced with the experience directly experienced by the person interested, entangled in the problems" (Szpunar 2010, 64) It is impossible to fully accept the other's point of view on the problem and conflict situation in the communication process, because we are never able to "get out of ourselves" and fully "impersonate" another person. We will never get to know all her/his communication experiences, deeply hidden needs, feelings, expectations, etc. We can try to understand the other person, get to know him/her the best we can, but we will never know him/her 100 percent and it is undoubtedly worth remembering.

It is of course an important issue how a social worker engages in a relationship built with the client. Empathy, attentive listening, communicative openness are important components of effective interpersonal communication that serve to build understanding, comprehension, closeness and trust. However, the issues of engagement and distance are important communication dilemmas in social work. It seems legitimate to find a golden measure to maintain a proper distance to the problems of clients and their families. As M. Bieńko rightly observes, "on the interpersonal level, dilemmas concern the determination of the boundaries of the relationship space, and thus the clash of commitment and distance in contact with the client" (Bieńko 2012, 98).

Of course, the dilemmas characteristic of social work are definitely more. They may refer not only to issues related to emotional involvement, compassion and empathy, but also to "choosing the lesser evil, making conflict between law, norm, policy and the goal of therapy, choice – care vs. control – between the well-being of the client and the well-being of the institution, in which we are employed or with which we cooperate; dilemmas also concern disproportions of power and knowledge between a social worker and a client" (Długi 2012, 56). Time pressure, stress, difficulty and complexity of the decision-making process are factors that make it difficult to deal with these dilemmas. In the field of interpersonal communication, it is worth emphasizing that its proper course can be facilitated by coping with problems and dilemmas, and thus serve to achieve the intended goals. Therefore, it is worth paying attention to the issues concerning the principles and rules of effective interpersonal communication, which is an important challenge in the work of social workers.

3. PRINCIPLES AND RULES OF INTERPERSONAL COMMUNICATION IN SOCIAL WORK

When considering interpersonal communication from the perspective of communication principles and rules, it is worth to first emphasize one of the most important principles of interpersonal communication, which concerns looking at each communication situation and at each interlocutor as an individual, a unique person, a conversation that can neither be undone nor repeated. This uniqueness

of conversations and interlocutors means that each subsequent meeting with the client is not treated as a routine conversation, but as a challenge and a key to understanding people. A social worker does not “enter” into a conversation with a ready assessment of the situation, but creates it on the received information, and uses the feedback as a tool to broaden knowledge on a specific topic. Of course, it should be remembered that the pressure of time can cause that the conversation does not proceed in a way that maximizes communication openness. In addition, the next struggle is, of course, the degree of difficulty of conversations with both the client and his relatives. Often, the topics discussed are difficult, painful, and sensitive, and the observations of the client’s situation and behaviour cause that messages that the social worker should pass on to his/her interlocutor may encounter resistance, opposition, anger and frustration.

However, regardless of the complexity of problems faced by customers, the difficulties of the topics discussed, it is worth remembering the above principles. It can protect the interlocutor from an inappropriate assessment to a given situation or an inappropriate matching of communication tools and forms of support and assistance.

Another principle on which the conversation with the client should be based in the careful and empathic listening, which on the one hand allows gathering the necessary information, and on the other hand allow the social worker to build the right atmosphere of conversation – an atmosphere of trust, credibility, security, understanding and respect. Therefore, listening in not only for gathering information, but for communicating the information to the interlocutor indicating that the listener is interested in the subject of conversation, is focused on understanding, support and help. As I. Podobas rightly notes, listening can “create a sense of support and encourage greater openness, confronting all problems – which may make our interlocutor aware of the source of his/her difficulties. Active listening helps to thoroughly analyse and construct the interlocutor’s statements, which increases his chances of solving the problem. It also allows to freely express oneself on a given topic, “throwing a given problem out”, thus reducing psychological tension” (Podobas 2014, 23).

An equally important principle of interpersonal communication is the use of questions. In communication practice, a social worker can use a variety of questions that allow the implementation of various goals. Questions not only serve to acquire new information, to deepen knowledge on a given topic. Properly asked questions allow reflection and looking at a given problem from a different perspective, opening to new solutions. Under the influence of these types of questions, the customer can look at the problem from a different perspective, see what was previously not visible.

Therefore, it is worth remembering that some communication activities, such as listening or asking questions, although they are primarily associated with acquiring information, often also serve to share it, allow you to look at the problem from a different perspective, making it easier to reach an agreement.

When considering issues regarding the principles of effective interpersonal communication, it is also important to emphasize the importance of the principle related to communication awareness. A social worker who wants to use communication tools to achieve his/her goals, help those in need, should pay attention to the conscious use of the available means and forms of communication. Communication awareness means that the sender in a thoughtful and responsible manner uses specific words and non-verbal behaviours, realizing the effects that messages sent by him/her can bring. Reactions of a verbal and non-verbal nature may in fact determine the course of a conversation, its length or subject matter.

The above-mentioned interpersonal communication rules do not exhaust the subject, because communication rules can also include the use of a language of respect, or the use of a language intelligible to the interlocutor. However, the principles described above are the basis for effective interpersonal communication, providing a signpost for the interlocutors indicating how the course of the conversation depends on communication skills, experience, knowledge, attitude to the interlocutor of each party.

SUMMARY

The activities of a social worker are largely based on the efficient and proper use of communication tools. Communication skills, efficient use of feedback, listening, asking questions, paying attention to issues related to the language used, attitude to the interlocutor, well-being or physical health, determine the relationships built with the client and his/her relatives. As B. Długi notes, “the characteristics of a person helping, such as: the way of conducting a conversation and expressing oneself, personality, temperament, attitude towards the client and our attitude towards him/her, can disrupt our relationship with the client so much that not only the substantial presentation of the problem and its cognition will be hindered, but the introduction of the expected change for the improvement of the client’s situation will also be disturbed” (Długi 2012, 53). Therefore, it should be remembered that the responsibility for the result of the conversation rests largely on the social worker, who should consciously use the available tools and means of communication, in order to properly adapt the specific form of assistance to a specific client. Therefore, it seems that communication awareness is a key communication principle on which a conversation with the client should be based. This awareness allows to adjust the language and non-verbal behaviours to a specific communication situation in a suitable way, as well as to predict the possible effects of specific communication behaviours.

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PARTICIPATION OF THE ROMAN CATHOLIC CHURCH IN THE PUBLIC
DEBATE ABOUT LEGAL REGULATIONS ON *IN VITRO* FERTILISATION
IN POLAND IN 2007-2015. SELECTED ASPECTS OF RELIGIOUS,
POLITICAL AND MEDIA DISCOURSE²

Abstract

The present publication is devoted to discourse and analyses the case of the Roman Catholic Church as a subject which, by presenting its teaching, participated in the Polish debate on legal regulations on *in vitro* fertilisation during the 6th and 7th term of the Sejm. Religious, political and media discourses have been juxtaposed.

Keywords: Church, public debate, *in vitro*, religious political and media discourse, 6th and 7th term of the Sejm

UDZIAŁ KOŚCIOŁA RZYMSKOKATOLICKIEGO W DEBACIE PUBLICZNEJ WOKÓŁ
REGULACJI PRAWNYCH ZAPŁODNIENIA *IN VITRO* W POLSCE W LATACH 2007-2015.
WYBRANE ASPEKTY DISKURSU RELIGIJNEGO, POLITYCZNEGO I MEDIALNEGO

Abstrakt

W publikacji, która dotyczy dyskursu, dokonano analizy przypadku Kościoła rzymskokatolickiego jako podmiotu, który brał udział w polskiej debacie o regulacjach prawnych

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zapłodnienia pozaustrojowego w okresie VI i VII kadencji Sejmu, prezentując swoje nauczanie. Zestawiono dyskurs religijny, polityczny i medialny.

Słowa kluczowe: Kościół, debata publiczna, *in vitro*, dyskurs religijny, polityczny i medialny, VI i VII kadencja Sejmu

INTRODUCTION

The Church's presence in the public sphere has long been an important question in European civilisation. As regards modern Polish society, the frequency of debates in this area may result from the systemic transformation and the arising possibility to open the discussion after the fall of the Communist system (Sowiński 2012, 9-10) and the emergence of pluralism (Borowik 2001, 25) and democracy³ in an open society (Kość 2008, 205). The state-Church relationship can be considered to have shifted from hostile to coordinated separation (Mazurkiewicz 2001, 319).

In modern Polish society, bioethical questions constitute one of the main issues in public debate. This discussion has a permanent character and seems to be a natural element of life in modern Poland. Such a situation is typical of free and pluralistic societies (Dahrendorf 2008, 277). It is an example of an axiological conflict (Wnuk-Lipiński 2005, 253-254). In principle, this dispute predominantly concerns abortion (Wejbert-Wąsiewicz 2011, 166), however, *in vitro* fertilisation, and especially its legal regulations, including the question of legality, has also been the subject of intense public debate over the past 30 years. The Catholic Church has been actively involved in that debate, defending its teaching and remaining faithful to the documents of the Holy See⁴ (Episkopat.pl 2015a; Episkopat.pl 2015b).

The publication is structured according to a problem-chronological order and it has an analytical-synthetic character. *Terminus a quo* (the year 2007) seems justified due to the intensification of the debate in the Polish public space on *in vitro* fertilisation (Kozub-Karkut 2017, 246-247) following the announcement by Health Minister, Ewa Kopacz of plans to reimburse this procedure. On the other hand, *terminus ad quem* (the year 2015) is important because of the adoption of a law regulating this issue at that time. After 2015, the topic of *in vitro* fertilisation was less frequently raised in Polish public discourse.

³ The Catholic Church supports democracy but does not approach it uncritically. It acknowledges that such a system does not constitute an autothalytic value *per se* but treats it as a means of implementing care for the common good and respect for human dignity (Nagórny 2009, 193).

⁴ *In vitro* fertilisation in humans is opposed, among others, by the Catechism of the Catholic Church (*Katechizm Kościoła Katolickiego* 1994, 2373-2379) and John Paul II's encyclical *Evangelium vitae* from 1995 and the *Dignitas personae* instruction on certain bioethical problems from 2008 issued by the Congregation for the Doctrine of the Faith. In 2015, the website episkopat.pl recalled documents of the Holy See criticizing *in vitro* fertilisation (Episkopat.pl 2015a). As Jacek Salij, OP writes: "The specificity of moral norms in relation to the beginnings of human life results from the uniqueness of man among phenomena, things, creatures, that is, generally beings that we meet on our earth" (Salij 2017, 210).

The paper, which has a preliminary character, is related to several subdisciplines of sociology. It mainly concerns religious, political and media, or even legal and ethical discourses. The author adheres to a comparative method, a case study and, above all, discourse analysis, which means approaching language as a social phenomenon (Horolets 2008, 5). It is the language that, as an important element of the debate, attracts special attention of the media and society (Kampka 2014, 130).

1. THE CATHOLIC CHURCH AND ITS PARTICIPATION IN PUBLIC LIFE

The Church is the object and subject of faith and constitutes a special reality. It is, moreover, the subject of science it provides and the object of science dealing with it. The Church is the subject of numerous sciences, primarily theology, but also, for example, history, philosophy and sociology (Bartnik 2009, 9-10).

The Catholic Church can be considered from the religious, but also from the social point of view, e.g. when it participates in a public debate and presents its teaching in the event of particularly important disputes concerning e.g. human rights, which may be the subject of legislative work undertaken by politicians. As Professor Józef Krukowski writes: “in the teaching of the Church, politics means a prudent care for the common good of the human person, that is, for building a social order in which the rights and freedoms of every human being are guaranteed and exercised” (Krukowski 1996, 7). The Roman Catholic Church in Poland plays exactly such a role.

Bioethics, including legal regulations on *in vitro* fertilisation, is one of the main issues in the political debate about human rights in technologically developed countries (Bołoz 2007, 17). As Prof. Stanisław Warzeszak contended: “On the example of *in vitro* fertilisation, we can see how difficult it was to achieve general social consensus, both in the world of science, medicine, politics, and in the opinion of society, which is differentiated by religion and worldview.” The theologian added further that the phenomenon of “artificial insemination” also touches upon the problem of violating human dignity (Warzeszak 2011, 152-153).

2. THE CHURCH IN THE DEBATE DURING THE 6TH TERM OF THE SEJM 2007-2011

The issue of *in vitro* fertilisation in the public debate in Poland was first raised in the 1980s, but it became a significant subject of dispute in 2007 (Kozub-Karkut 2017, 246-247). Intensification of public discourse in this area took place after announcing reimbursement of this type of treatment. Prior to that, it was merely an insignificant part of public discourse, or the activity of the Catholic Church, with the exception for, e.g. the Pastoral Letter of the Polish Bishops for the Feast of the Holy Family in 2003 (Kardynałowie 2003).

The announcement in 2007 of planned reimbursement met with a quick response from the Church. In the letter of the Council for Family of the Polish

Bishops' Conference to legislators of December 2007, attention was drawn to the teaching of John Paul II on in vitro fertilisation (Episkopat.pl 2015b). In the following years, bishops also addressed the topic of IVF in their official communications, presenting the opinion of the Church. The legal aspects, however, were not the main subject of bishops' reflection. Considering the subject of the article, it seems important to mention the statement of the Presidium of the Polish Bishops' Conference in 2010, in which the faithful were asked to pray for members of parliament. The bishops wrote: "In the coming days and weeks, when works will be carried out at the sessions and committees of the Sejm and Senate of the Republic of Poland, let us ask God for the grace of the Holy Spirit for the consciences of all parliamentarians as well as for courage allowing them to adopt the best legal solutions, consistent with the universal right to life, guaranteeing «the dignity of the human person called to fulfil God's calling in the gift of love and life»" (Konferencja Episkopatu Polski 2010).

Besides addressing official, collegial speeches, the hierarchs also spoke about legal regulations on in vitro, for example, in press interviews. A famous statement was made in 2010 by Archbishop Henryk Hoser, chairman of the Polish Bishops' Conference Team for Bioethics, and the Warsaw-Praga Ordinary Archbishop for the Polish Press Agency. When asked about Catholic MPs supporting IVF, along with embryo freezing and selection, the hierarch gave the following answer: "If they are aware of what they are doing and want such a situation to occur, if they do not act towards reducing the harmfulness of such an act, then in my opinion they are automatically excluded from the community of the Church" (Karnacewicz and Rozwód 2010).

Priests also contributed their opinion in this respect, although their voices did not meet with such a wide public response. They generally spoke in the similar vein as bishops, but unlike them, they did not tend to focus in their popular statements so specifically on regulatory aspects of the question. Similarly to bishops, they often explained the teaching of the Church, providing arguments related to human rights. An example here can be Prof. Jacek Salij, OP. In an interview with KAI Catholic Press Agency, the theologian, referring to in vitro fertilisation, stated: "It is true that many people perceive the Church's opposition to such endeavours to have a child as a sign of backwardness and not keeping up with progress. In exactly the same manner, however, the Church was accused of backwardness and obscurantism, when in the interwar period it firmly opposed the laws on compulsory sterilization of people who «should not have children»". The clergyman further added: "If the Church began to adapt its teaching to human expectations, it would cease to be a servant of God's truth" (KAI 2009a).

At this point, mention should also be made of the involvement of lay Catholics during the 6th term of the Sejm. Jacek Kotula, the coordinator of the civic project from 2009 banning IVF, directly referred to the teaching of the Church. Referring to the existing legislative proposals in the field of in vitro fertilisation, he stated that: "what has been presented so far is inconsistent with the teaching of the Church"

(KAI 2009b). The project was rejected, and the first reading of parliamentary bills regulating this issue, which to a lesser extent took into account the teaching of the Church, took place in 2010. Some of them were referred for further work, but eventually, the Sejm of the 6th term of office did not introduce reimbursement of the IVF procedure from the state budget nor did it pass an act regulating in vitro fertilisation (Kowalczyk 2018, 14).

3. THE CHURCH IN THE DEBATE DURING THE 7TH TERM OF THE SEJM 2011-2015

At the beginning of this term, disputes concerned mainly the question of reimbursing in vitro fertilisation from public funds and led to the introduction of such a program at the national level. The issue of statutory regulation of in vitro fertilisation appeared as a frequent topic of public debate once the government of Ewa Kopacz took office (Łoziński 2014).

Catholic hierarchs actively participated in the in vitro dispute in Poland in 2015. In the document of March 31, 2015, when the legislative process in this area was commenced, the Presidium of the Polish Bishops' Conference indicated proposals that were contrary to Catholic teaching (Dyda 2016, 112). The bishops' comments were omitted by the legislator. Finally, on June 25, 2015, the Sejm passed the act in a liberal version. In reaction to this, the Presidium of the Polish Bishops' Conference issued a statement in which it called for the amendment of the law in the Senate, referring to the March document (Gądecki, Jędraszewski and Miziński 2015b). However, the Senate dismissed the bishops' appeal and supported the act in the version passed by the Sejm. As a result, Archbishop Stanisław Gądecki, President of the Polish Bishops' Conference, appealed to President Bronisław Komorowski. The hierarch asked the head of state to veto the act or refer it to the Constitutional Tribunal (Kowalczyk 2018, 16). However, the president signed the act on July 22, and referred it only partially to the Constitutional Tribunal under the *aposteriori* procedure. In response to the decision of the head of state, Archbishop Henryk Hoser stated that the aforementioned normative act would require, as soon as possible, "improvement and adaptation to elementary human rights" (KAI 2015a).

The Legal Council of the Polish Bishops' Conference presided by Archbishop Andrzej Dzięga announced that the politicians who voted for the liberal regulations of in vitro fertilisation committed a grave sin. These words sparked numerous comments, also among some of the clergy. For example, Father Alfred Wierzbicki from the Catholic University of Lublin told the journalists from "Gazeta Wyborcza": "The law is not everything in the Church, and excessive application of the law may prove to be detrimental. The recommendation of the Legal Council brings little order, and some may feel outraged by it. Bishops should rather appeal to consciences, conduct dialogue. We need gentleness and mercy, even in such fundamental matters as in vitro" (Wiśniewska 2015). It was not the only important

statement made by priests who distanced themselves from the initiatives of Polish bishops in the field of IVF at that time. A famous event was the Holy Mass celebrated at the end of Bronisław Komorowski's presidency. Father Aleksander Seniuk apologized to the politician for the injustices by the Church that, according to him, the outgoing president suffered in the context of signing the in vitro act. The clergyman distanced himself from the episcopate, saying: "we are not episcopoi, we are presbyteroi - priests." Later, however, Father Seniuk stated that he did not want to oppose the position of the bishops (PCh24.pl 2015b). Basically, however, it was difficult to notice in Poland any significant criticism of the episcopal activities by the presbyterate in relation to the discussed issue.

However, as regards, moral assessment of in vitro fertilisation, priests spoke unanimously in the public discourse. For example, Father Prof. Stanisław Warzeszak claimed that the deputies who supported the government's bill on in vitro fertilisation were guilty of a grave sin (Gosc.pl 2015). Prof. Wojciech Góralski, a specialist in canon law, made a similar statement saying that: "Voting for the IVF law and signing it by the president is an obvious grave public sin. Because it is, above all, condemning to death those who under this law will perish, if only in the eugenic practices of embryo selection. But the IVF procedure as a whole is sinful from the very beginning to the end and it is inconsistent with God's Law" (Naszdziennik.pl 2015).

Bishops unanimously defended the teaching of the Church in public debate in the context of legislative work, but they differed in their measures. Some of them did it in a conspicuous manner. For example, Archbishop Andrzej Dzięga, the Metropolitan of Szczecin and Kamień, defined the law adopted in this respect as criminal (PCh24.pl 2015a). On the other hand, Archbishop Marek Jędraszewski, the Metropolitan of Łódź, considered the IVF Act as a betrayal of the moral values of the Warsaw Uprising, saying: the «gender recognition» act can be regarded as a betrayal of those moral values for which the Uprising broke out in the first place" (Tokfm.pl 2015). Some bishops adopted a more measured approach to defending bioethical values. For example, Cardinal Stanisław Dziwisz, the Archbishop of Krakow at that time, criticized the in vitro fertilisation act, describing it as very liberal, but he did not resort to emotional comments or to controversial comparisons. The clergyman said: "I was sad to hear the information that the Polish parliament passed an extremely liberal act on the in vitro method" (KAI 2015b). Many clergymen, including bishops, referred to the issue of in vitro fertilisation without taking into account the legal context, e.g. only mentioning religious and moral aspects, however, these statements have been omitted here, due to the scope of this study.

Initiatives of Polish lay Catholics constitute a rather minor aspect of activities undertaken by the Catholic Church in the conflict over the legal regulations on IVF in Poland during the 7th term of the Sejm (compared to the 6th term), but they could not be omitted in the article. The faithful, involved in the life of the

Church and by supporting its teachings, made a contribution to the activities undertaken in the conflict analysed in this paper. An important role was played here, among others, by the environment of “Nasz Dziennik”. The main initiative in this regard was a novena promoted by “Nasz Dziennik” on the gifts of the Holy Spirit for senators before the vote of the act (Bochenek 2015, 1&9).

4. POLITICAL AND MEDIA COMMENTS ON THE ACTIVITIES OF THE CHURCH

The activity of the Catholic Church was the subject of numerous comments on the part of politicians. Some of them, for example PiS representatives, expected the Church to take an active part in the public debate and offered their help in this respect. For example, the senator of the above-mentioned formation, Stanisław Kogut, after the adoption of the act, announced that his party, together with bishops, would strive towards amending the law. The politician said: “If we win the election, there is an entire team that, in agreement with the episcopate, will introduce changes so that people can have children. We promote naprotechnology” (RadioKraków.pl 2015).

On the other hand, some politicians, e.g. those associated with the Civic Platform (PO) were dismissive of the activities of the Church. An example of such an attitude may be the behaviour of President Bronisław Komorowski, who, in the context of the aforementioned words of Archbishop Hoser about excommunication, said: “This is an institution a bit from a different era and it seems to me that nothing like this will happen, because it would also be fatal for the relationship between the state and the Church, democracy and the Church” (Deon.pl 2010).

In turn, some politicians, e.g. representatives of the Democratic Left Alliance (SLD), considered the activity of the Church as a threat to the rule of law and democracy, as evidenced by the statement by Katarzyna Piekarska referring to the words of Archbishop Hoser in 2010 about excommunication. The politician stated: “We consider it as an unacceptable attack on parliamentarians in the law-making process. The archbishop actually behaved like a lobbyist, but he has not registered himself as a lobbyist and acts on the verge of blackmail” (Onet.pl 2010).

Non-political participants in the media debate also, in various ways, referred to the activities of the Church. Some of them revealed a disrespectful or mocking attitude to the Church’s initiatives. For example, Magdalena Środa, in a column published in wp.pl, referring to critical statements on IVF made by bishops on the Feast of the Holy Family in 2008, tried to juxtapose in vitro fertilisation and the conception of Jesus (Środa 2008).

Some participants in the media debate were critical of the Church’s activity. For example, Professor Jan Woleński, in his text for Polityka.pl in 2015, accused the Church of corrupting the state, when he wrote: “Participation of the Church in the political game, although, let us repeat, admissible, brings quite specific damage. Challenging the law (this applies not only to the IVF law, but also to the so-called anti-violence convention or the law on gender recognition; and it is not only the

question of criticism, but also of calling for non-application of the law) adopted within the normal democratic order and congruent with global trends is corruption of the state, the more so, done in a situation in which the Church recognized that law by signing an appropriate international agreement” (Woleński 2015).

Some journalists, mainly those representing the right-wing, defended the Church, recognizing the fact that in a democratic state it has the right to express its views and influence legal regulations concerning in vitro fertilisation. In 2015, Piotr Zaremba stated in the weekly “W Sieci”: “The Catholic Church has every right to proclaim that this technology is launching a march in an unknown direction: towards human production. If we decide to accept it once, we have to be prepared for all kinds of abuse and experiments” (Zaremba 2015).

CONCLUSION

The issue discussed in this publication has been presented in a general way. The author tried to present its most important aspects focusing on those topics of the public debate on in vitro fertilisation, which concerned its legal regulations and were related to the activity of the Roman Catholic Church in this area. Based on the analysis of public discourse, it can be concluded that Polish bishops in the years 2007-2015 actively and unanimously opposed in vitro fertilisation and the related practices, remaining faithful to the documents of the Holy See (Episkopat.pl 2015a; Episkopat.pl 2015b). At the end of the above-mentioned period (as opposed to the 6th term of the Sejm), several priests criticized the way the bishops presented the teaching of the Church. However, the presbyterate did not distance itself from the episcopate as regards the negative moral assessment of in vitro fertilisation. The laity in the period of legislative works in 2015 revealed a rather passive attitude to the discussed conflict, as opposed to the earlier period (when there was a civic legislative initiative from 2009 demanding a ban on in vitro fertilisation).

The Church’s activity was commented on by politicians. Some of them supported it actively, some approached it dismissively, and some criticized the Church’s attempts to influence the law. The situation in the media debate was alike. It is worth noting that although the religious discourse was at least generally balanced, some participants in the media and political debate criticized the very fact that the Church spoke out publicly about in vitro legal regulations.

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SOCIAL RESPONSIBILITY OF MUSEUM EDUCATION. RESEARCH DIRECTIONS²

Abstract

The noticeable changes taking place in museums, regardless of the character of the collected and displayed artefacts or objects, allow one to draw attention to a definite turn towards the audience. Inclusiveness of educational activities, which results from the transition from passive to active cooperation methods, leads to an increasingly common educational turn within the field of museum studies. The article is an attempt to present the research perspective undertaken by the author. This kind of approach involves examining the role of museums in societal changes. The definition of social responsibility ought to be considered from different points of view while taking into consideration documents of museum strategies.

Keywords: museum education, social responsibility, audience development, museology, sociology

SPOŁECZNA ODPOWIEDZIALNOŚĆ EDUKACJI MUZEALNEJ. KIERUNKI BADAŃ

Abstrakt

Zauważalne zmiany zachodzące w muzeach, bez względu na charakter gromadzonych i pokazywanych artefaktów czy obiektów, pozwalają zwrócić uwagę na zdecydowany zwrot ku publiczności. Inkluzywność edukacyjnej działalności wynikająca z przechodzenia od pasywnych do aktywizujących metod współpracy wywołuje coraz bardziej powszechny w muzealnictwie zwrot edukacyjny. Artykuł jest próbą omówienia przyjętych kierunków badawczych celem uchwycenia roli muzeów w zachodzącej zmianie społecznej. Definicja społecznej odpowiedzialności powinna być rozpatrywana z wielu perspektyw przy uwzględnieniu także dokumentów strategicznych muzeów.

Słowa kluczowe: edukacja muzealna, odpowiedzialność społeczna, rozwój odbiorców, muzeologia, socjologia

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INTRODUCTION

“Beyond the captions, the information panels, the accompanying catalogue, the press handout, there is a subtext comprising innumerable diverse, often contradictory strands, woven from the wishes and ambitions, the intellectual or political or social or educational aspirations and preconceptions of the museum director, the curator, the scholar, the designer, the sponsor – to say nothing of the society, the political or educational system which nurtured all these people and in so doing left its stamp upon them. Such considerations, rather than, say, the administration of museums, their methods and techniques of conservation, their financial well-being, their success or neglect in the eyes of the public, are the subject matter of the new museology” (Vergo 1989, 3)³.

It was with these words of introduction that Peter Vergo began, in December 1988, his breakthrough discussion on the goals which are set for museums and museology, describing it as the new museology. As doctor Mirosław Borusiewicz noted, Vergo accused old museology of being concerned too much with the methodology of the museum activities, and not enough with their goals (Borusiewicz 2012, 102). It is therefore worth looking at the consequences and changes that Polish museology has experienced over the past thirty years. One of the most important effects is certainly the museum education to which this article has been devoted⁴.

This article is an attempt to outline research directions based on the grounded theory, using the triangulation of research techniques combining the analysis of the available documents (sources), observations, in-depth interviews and quantitative data facilitated by the investigated museums as well as by the National Institute for Museums and Public Collections (NIMOZ). This will help to diagnose the state of museum education in terms of its social responsibility and thus to complement the museum knowledge previously not described in this manner in Poland.

1. THE MUSEOLOGICAL VIEW

The educational shift which can be noticed in the current discourse allows to develop, as doctor Nieroba remarks, a new definition of the status of an artist, a curator, an educator, the audience, and the work of art in the creative act.

³ All the quotations within the text are the author's own translations from Polish sources [excluding Vergo's original citations].

⁴ The article is an extension of the author's speech entitled “Social responsibility of museum education. Research directions.” during the international scientific conference “What's new? Revisiting new museology 30 years later” organized by the Institute of Ethnology and Cultural Anthropology of the Jagiellonian University, the Institute of Art History of the Jagiellonian University and the National Museum in Krakow on 20-21.11.2019 in Krakow.

“The new way of producing knowledge is supposed to be a tool which will make it possible to capture the past and current phenomena and to build new strategies of their communication. This way, an educational project that was until now aimed only at supporting, for example, an exhibition, has become an autonomous work of art itself” (Nieroba 2019, 107).

While summing up the research in her earlier work, “Between the common good and elitism. The contemporary museum model” from 2016, Nieroba wrote that “the world in which contemporary museums operate forces us to reflect on the social functions which they can fulfil. Each museum has to face different challenges – the structure and expectations of their target audiences are changing, and the methods of communication should be adjusted accordingly” (Nieroba 2016, 225). It seems, therefore, that it is impossible to continue the discussion on the subject mentioned without an interdisciplinary approach combining expertise and experience in museum knowledge with sociology and a great emphasis on the issue of social research. This can be an answer to Borusiewicz’s reflection that “unfortunately, Polish sociology academics continue to be disinterested in museums, thus any attempts at this type of research conducted by some universities tend to be fragmentary in nature and do not allow one to draw even general conclusions” (Borusiewicz 2012, 142). It can be stated that in the vast majority museum education, which is defined as the space of interaction of all visitors, is the right field for sociological research⁵.

Another crucial aspect is the issue of “social responsibility”. It is mostly associated with the world of business, where the phrase CSR – corporate social responsibility – is used. Professor Łukasz Gawęł has already written on CSR in the context of managing museums as public cultural institutions. He highlighted four areas in need of development and arrangement in Polish museums based on CSR: 1. organizational order, 2. relations with employees, 3. relations with the audience, 4. social engagement. He also added:

“Cultural institutions provide one of the most important spaces for negotiating cultural values as well as social and ethical norms (values) that are important for the community. However, the question is whether or not we are making a serious mistake by reflecting on their social responsibility” (Gawęł 2018a, 50).

In order to somewhat rectify that mistake, it ought to be mentioned that, since 2017, the National Institute for Museums and Public Collections (NIMOZ) has been running a project on researching the museum audience and the way museums function in their social environment. In 2017 a report by Piotr T. Kwiatkowski and Beata Nessel-Łukasik entitled *Publiczność muzeów w Polsce*.

⁵ Here I would like to thank Professor Rafał Wiśniewski, a sociologist from the Cardinal Stefan Wyszyński University in Warsaw and head of the National Centre for Culture, for his inspiration and invaluable help with my research. I would also like to thank Izabela Bukalska, PhD, also from the Sociology Department of the Cardinal Stefan Wyszyński University in Warsaw for her academic support.

Badania pilotażowe (Eng. Museum Audience in Poland. Pilot study) was published (Kwiatkowski and Nessel-Łukasik 2017); a year later the same authors presented yet another one – *Muzeum w społeczności lokalnej* (Eng. Museum in the Local Community) (Kwiatkowski and Nessel-Łukasik 2018b). In 2018 they published a handbook *ABC Badania publiczności w muzeum* (Eng. An ABC of Studies on Museum Audience) which was part of the complimentary training publications for museum experts (Kwiatkowski and Nessel-Łukasik 2018a). A significant input into the museum studies discourse is also provided by Elżbieta Nieroba (Nieroba 2016; Nieroba 2019), and one of the first publications within Polish studies on museum sociology was published by Jerzy Mikułowski-Pomorski (Mikułowski-Pomorski 1994), however it only broadly discusses the studies conducted between the 1950's and the 1970's.

2. THE SOCIOLOGICAL REFLECTIONS

To initiate further discourse, several thoughts on the issue of museum education in the context of its social responsibility will be presented, in line with the previously defined deficits, on the basis of the paradigms it is based upon. It starts with setting symbolic interactionism as a starting point, which differentiates among three dimensions of social significance: 1. cognitive dimension, 2. communication dimension, 3. dramaturgical dimension or creating meanings in people's mutual interactions (Hałas 2006, 93). One should also take functionalism into account, with its view of the world as a system of elements linked with their functions, where understanding a specific social (or institutional) behavior requires thinking of how they serve the continued existence of the social system as a whole. For example, in order to understand the meaning of a museum, one should correctly identify the need which is to be met, i.e. the extent to which a museum serves social adaptation (Gofron 2008, 46). The assumptions of the neo-institutional theory are also worth pointing out, where an institution provides the foundation for the social order and the context for actions of individuals within the society. Institutions are social structures, relatively stable in time, shaping individuals' behaviors, and ensuring the experience of common values and the existence of coherent points of reference for identifying the meaning of particular actions (Marczewska 2016, 186).

Bearing in mind the groundbreaking research conducted by Pierre Bourdieu (Bourdieu, Darbel and Schnapper 1991; Wiśniewski et al. 2019, 42-51), yet another important summary of the issue of museum sociology, in both academic and institutional practice, was undertaken by Volker Kirchberg who touched upon the impact of society on museums and museums on society (Kirchberg 2016). Referring to the Weberian definition of action, he stated that it is justified to practice the sociology of museology, suspended between theory and practice both in the study of the institution, its recipients and social relations as museums are both the source and the result of human activity (Kirchberg 2016, 232). Kirchberg

referred to the 1996 breakthrough study of Gordon Fyfe and Sharon Macdonald entitled "Theorizing museums", which initiated the sociological discourse around museum science, understood as the continuous building of relations between the museum and values, memory, identity, economy and management. The impetus to start the sociological research in museums of various types has become the need to redefine their functions to confirm the need for their existence caused by postmodern changes, thus implying the presence of both new professional roles and market requirements associated with marketing research or research on the needs of recipients.

3. RESEARCH METHODOLOGY

To illustrate the selected research process, it is necessary to present the grounded theory methodology developed by Barney G. Glaser and Anselm L. Strauss and described in their work entitled *The discovery of Grounded Theory: Strategies for Qualitative Research*, firstly published in 1967 (Glaser and Strauss 2009). It has been refined, both theory- and workshop-wise, and published as a handbook by Kathy Charmaz under the title *Constructing Grounded Theory. A practical Guide Through Qualitative Analysis* (Charmaz 2009). In the realm of the methodology, it is particularly important for the researcher to remain open to forming and modifying the methods of collecting data, at the same time to improving them, bearing in mind that it might influence "what phenomena they will see, where and when they will notice them and what conclusions will be drawn out of them" (Charmaz 2009, 25). Occasionally, during the data collecting process, there might occur new materials, which primarily have not been taken into account. Concurrently, a theory should not be used to formulate a hypothesis prior to obtaining data (Charmaz 2009, 216).

"researchers using the grounded theory methodology very often initiate their studies, having had certain research interests and a general set of concepts. Those concepts are the source of preliminary ideas, which need to be considered, and they draw attention to certain questions which ought to be asked regarding the subject of the study" (Charmaz 2009, 27).

While searching for the essence of the grounded theory, which allows one to outline the research process consistent with the article's title, it is worth accentuating its character, following the idea of Kathy Charmaz. Thus, the submitted paper presents an adaptable and interactive nature, its research problem influenced the preliminary method of collecting data, and its author speaks as an integral part of the research topic (Charmaz 2009, 228). At the same time, it is important to notice that in the grounded-theory-based research, it is the analysis which guides the entire process, during which new methods of obtaining data might be necessary. However, the most significant aspects are:

- Consecutive levels of abstractions emerging during comparative analysis, which are the foundation of the analysis leading towards the grounded theory⁶.
- Analytical directions are rather based on researchers' reactions to their own comparisons, analysis and interpretations, rather than on external recommendations (Charmaz 2009, 229).

At this point, a few words must be presented on how the sample was selected for the needs of the researches. Since 2013, the National Institute for Museums and Public Collections (NIMOZ) has been carrying out the research as part of the Museum Statistics project. The recently published data for 2017 (Andrzejkowicz and Źmijewska 2018) show that 247 museums took part in the study, i.e. 24.1% of all the museums in Poland, whose total number was 1,027, regardless of the form of ownership. According to the information obtained by the National Institute for Museums and Public Collections, 147 surveyed museums have either a promotion and image strategy or the results of surveys regarding their image and audience structure. Interestingly, what was missing from the survey was the question on the functioning of an institution based on strategic long-term development, and these were the most desirable for the purpose of the study. In cooperation with Professor Wiśniewski, 147 museums were asked to collaborate for the purposes of this research on museum social education, and to provide access to the previously mentioned documents. It should be noted here that, as a result of this discussion, paradoxically the institutions were most eager to share with the researches on their general development strategies. The more cooperative a museum was, having a promotion and image strategy or professional surveys available, the more it was found to operate primarily on the basis of a written general development strategy available in a version including accurate graphs and illustrations or photographs. A total of 65 museums responded to the invitation, of which 60 positively. Following an analysis of the available documents, seven museums were selected across Poland with regard to: the positioning of their education department in the organizational structure, the concept of its development, the shaping of its image, and its role in the communications. In this section it ought to be mentioned that the documents describing the museum strategy at a given time, are internal files developed according to the individual vision and possibility of the institution. It is challenging to describe them in a structured way and to systematize the data they contain as different criteria need to be applied for each one. Each of the seven museums also have a different form of ownership, comprising of: local-government museums, those reporting only to the Ministry of Culture and National Heritage, those run jointly by local governments and the Ministry of Culture and National Heritage as well as museums managed by a different ministry. They additionally differ in the

⁶ While conducting data analysis new theories can be based upon the current research state and highlight both low level and overarching research themes, for more on the subject of grounded theory see Glenn A. Bowen (2006, 12-23).

nature of their collections, as there is an open-air museum (called a “skansen”), a city museum, a regional museum, a national museum, and a museum within a historical building with a garden. At the next stage of the research on each of the museums, in-depth interviews will be carried out with their directors or assigned deputies, heads of education departments, heads of departments responsible for communication, educators, persons in charge of keeping watch of the exhibitions.

Based on the grounded theory methodology, it is safe to assume that the interviews will be carried out one-by-one in subsequent institutions, in order to fill in the gaps in data and make the study more specific. Thanks to the definition of “new museology”, slow but noticeable changes have started to take place in the functioning of museums as structures, in the awareness of their employees’ actions, in the relations initiated with their audiences, and in the developed offer. The conducted qualitative and quantitative research based on data triangulation will provide an answer to the questions about:

- The place currently held by education, understood as a department in the organizational structure of a museum, as the nature of the offer, and, finally, as a form of dialogue with the audience.
- How do the respondents interpret the issue of museum education responsibility?
- What kind of change can museum education cause in society in general, and what kind of changes does it cause within an institution?
- What are the correlations among the changes taking place in museums, changes relating to technology, marketing, promotion and image, or changes in approaches and teaching methods?
- How does it affect social capital, and to what extent does it contribute to its creation?
- How does museum education affect social change among groups with disabilities and groups from the so-called disadvantaged backgrounds?
- At the same time, one should ask whether, through education, society is given an opportunity to reflect on what is the purpose of museums. The process should lead, through the satisfaction gained from the contact with heritage, to understanding and noticing its value, consequently evoking the feeling of being responsible for that heritage (Gawel 2018b, 20).
- Does museum education shape permanent attitudes of responsibility, involvement, and concern about culture and heritage?
- What kind of contribution, if any, can an individual make to the social system?
- How can a selection of museum education methods affect those changes in the macro- and micro- society?
- What kind of an impact on the relations among museum employees will such an offer have, assuming it is prepared in a joint, cross departmental, and conscious manner?

- Finally, how can one foster, through cooperation with educators, the awareness of the social role of a museum among employees who are not related to museum education in their day-to-day work?

“Investigating the artistic sphere creates the necessity to make research decisions fundamental from the sociological standpoint. Establishing facts is imperative to re-create the sphere of imaginations, which seems both mandatory and difficult in case of a discipline operating in axiological categories, as it happens within art. The sociologist has two options which are the stages of research development. They can stop at the first stage in accordance to the positivist assumptions and discover the truth which lies under the layer of imaginations and representations, what is closer to the critical approach. Anthropological inspirations may, however, make this stage the primary memento of a complex study which distinguishes logic immanent to creating and consolidating imaginations” (Heinich 2010, 114).

Museum education, which in Polish source literature to a large degree is treated mainly in terms of statistics⁷, requires a more descriptive approach and an in-depth qualitative analysis, paying attention to the character of its reception, and possibly broadening its conceptual apparatus⁸. It is particularly important nowadays, when museums are facing challenges such as population aging, cultural diversity, intensification of everyday online communication, the need of individuals for participation in the institutional life, and the question of sustainable development during economically difficult times. The matter of social responsibility regarding museum education opens new fields of studies, especially based on the grounded theory methodology. Professor Marian Golka clearly emphasized that “the reception of art is the only confirmation of its societal value, being also the public expression of its fate” (Golka 2008, 170) as well as that “only the act of perceiving art by the audience ensues its societal fulfillment and a unique kind of creation” (Golka 2008, 170). At this point it is impossible to advance any further thesis without conducting the above-mentioned studies because, as Golka stated, “the status of art is determined by its reception, and the reception is determined by the audience, whose existence we are aware of, not fully knowing what their contours or specific figure are” (Golka 2008, 185). It is one of the key statements, which ought to be treated with the utmost attention by the majority of Polish museums. As observations and conversations show, the museum environment is still lacking proper research on

⁷ The first and last of such in-depth quantity studies in museum education was published in 2012 (Szeląg 2012), which exemplifies the need for the continuation given the field’s dynamic situation in Poland.

⁸ The term which does not seem to appear within the Polish museum sphere is “mediation”, used more and more often in the field of art sociology as well as in the museum practice in Western Europe, particularly regarding contemporary art. “It designates all the mediations between the artwork and its recipients” (Heinich 2010, 83). Observations and interviews conducted by the author lead to the conclusion that the term art mediation is predominantly dedicated to educational actions focused on contemporary art, where the dialogue moderated and inspired by art educators seems to be the most effective mean of communication.

the audience statistics – their age, origin, perception possibilities, needs etc. The studies must go beyond marketing and report needs in order to broaden the circle of recipients, not only in attendance depiction, but also by answering their needs. “The incomplete image of the needs and expectations of particular audience groups makes certain undertakings insufficient as the proposals are often inadequate to the hopes of potential recipients, leading to create new models of education” (Nessel-Łukasik 2019, 179). To make those museum initiatives satisfactory to the potential guest’s expectations, the host needs to build a systematic, extensive relation with its audience. Especially nowadays, in times of social media and highly developed research possibilities, the fear of decreasing number of visitors can be minimized – “the status of art is determined by its reception, and the reception is determined by the audience, whose existence we are aware of, not fully knowing what their contours or specific figure are” (Golka 2008, 185). To make the reception process even clearer for the decision-maker, Golka distinguished the following components: sensorial perception, aesthetic experience, reading, evaluation, memorizing, internalizing the value, influence on the basics (Golka 2008, 186)

Summarizing, as Marian Golka noticed, the influence on the basics is hard to measure and is relatively rare, being relatable only to exceptional art works and experiences (Golka 2008, 198-199). However, from the author’s point of view it is the most interesting element of grand process of not only the perception of the artwork, museum artefact or presented object but its consequences for both the audience and the offer provider i.e. the museum.

THE SUMMARY

Although the need for social research within the Polish museum field receives increasingly more attention, it is not sufficient due to the lack of funding for such measures being the usual culprit. However, this demand faces many other obstacles as seen in the statement received from one of the museums “audience surveys were carried out here by a local university a year ago, but we didn’t think about asking them for the results. As for the number of visitors, we do count them, but we don’t draw any conclusions based on that”. It is therefore necessary to show measurable results that can be achieved by investigating the audiences’ preferences; and this means educating museum employees. One cannot speak of “audience development”, which has been gaining more and more popularity recently, unless the real needs of that audience are considered with a reasonable approach by the designers of the offer. The academic and pragmatic approach is provided in the quote by Professor Łukasz Gawel:

“While searching for a definition of a museum meeting the needs of today’s audiences, used to sophisticated visual communication being present in various areas of their lives, one should look for a way to combine the requirements of protecting, collecting and documenting exhibits with their modern dissemination, taking into account the diverse needs of contemporary

audiences. (...) modern museum education can make a breakthrough in all those museums in which the belief is still held that these institutions are made for things, not for people” (Gaweł 2018b, 31).

Such an attitude towards the problem, which is likely to have laid the foundations for the new museology as understood by Peter Vergo 30 years ago, nowadays should be considered museums’ duty in order to work for the development of museology in the social sense and at the same time to cooperate with the society for the positive future of museum studies.

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LEBANESE EXPERIENCES AND THE CHALLENGES OF EVERYDAY LIFE IN POLAND

Abstract

The article addresses the issue of pluralism in the axiological and normative area which affects Polish-Lebanese relations. It presents the findings of a research on the Lebanese community in Poland. The research gives insight into Lebanese citizens' motivations for moving to Poland and their opinions on everyday life in this country.

Keywords: qualitative sociology, migration, intercultural communication, family ties

LIBAŃSKIE DOŚWIADCZENIA I WYZWANIA ŻYCIA CODZIENNEGO W POLSCE

Abstrakt

Artykuł dotyczy kwestii pluralizmu w obszarze aksjologicznym i normatywnym, który wpływa na stosunki polsko-libańskie. Prezentuje wyniki badań przeprowadzonych pośród Libańczyków mieszkających w Polsce. Badanie daje wgląd w motywacje obywateli Libanu do przeprowadzki do Polski i ich opinie na temat codziennego życia w tym kraju.

Słowa kluczowe: socjologia jakościowa, migracja, komunikacja międzykulturowa, więzi rodzinne

INTRODUCTION

Lebanon is a relatively small Middle East country on the Mediterranean coast, bordering Syria and Israel (Korzeniewski 2004, 41). Its area equals approximately one third of the area of Poland, and in 2015 the country had over 6.85 m inhabitants (The World Bank 2021). What differentiates Lebanon from other countries in the region is its religious diversity. The amazing cultural mosaic shows that cohabitation and cooperation of different communities is possible (although

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not easy), and it has been an element of the long tradition of the region. However, as a result of the geopolitical situation many Lebanese people cannot live in their country. Therefore, a large part of the Lebanese diaspora is presently living abroad. The main reason for emigration was numerous wars which afflicted Lebanon, including the civil war which lasted from 1970s to 1990s (Reklajtis 2003, 55). Due to the political situation many citizens of the “Switzerland of the Middle East” came to Poland, although not many Lebanese people. Poland was not a primary destination for emigrants. According to Polish Central Statistical Office, in 2002 there were 174 Lebanese citizens living in Poland. It is assumed, however, that these data do not reflect the reality accurately (the number may be twice as high). According to the Office for Foreigners, in the years 2003-2005 45 Lebanese citizens received Polish visas with residence permit, 22 persons were granted residence permit in Poland, and 136 persons received temporary residence permit (Urząd do Spraw Cudzoziemców 2021). A relatively small number of Lebanese citizens living in Poland may result from the fact that diplomatic relations between the two countries have not been intensive in the last several years. Lebanese embassy in Poland opened only in 1994 (before Poland was under the “supervision” of the embassy in Prague), and diplomatic relations between Lebanon and the People’s Republic of Poland (PRL) were initiated in 1956. They have never been intensive due to, among other factors, the historical events of the World War Two.

The aim of the article is to present pluralism in the axiological and normative area which affects Polish – Lebanese relations in Poland. It uses the research performed by Elżbieta Reklajtis and the author before the migration crisis. The research was qualitative – researchers used the technique of partially structured in-depth interviews which were carried out in Poland (in Warsaw, Łódź, Poznań, Wrocław, Kielce, Cracow, Puławy, Racibórz). Almost all interviews were conducted in Polish, only three were in foreign languages (two in English and one in French); in four cases the Lebanese persons interviewed resorted to English or asked family members to translate the questions into French. The answers were given in Polish. The research was done on a purposive sample of Lebanese people living in Poland. The researchers used typological sampling, taking into account sex, age, education, religion, place of residence in Poland and, especially, citizenship and time of residence in Poland (not shorter than 12 months).

1. REASONS FOR MIGRATION

It is not surprising that one of the most important reasons for migration was wars experienced by the Lebanese (the present situation also cannot be regarded as stable) (Madeyska 2008, 54-69). Emigration from Lebanon is a result of the civil war and its consequences (Reklajtis 2003, 71-84). The population of Lebanese people in Lebanon is presently about 4 million. It is assumed that another 4 million live outside Lebanon, in the USA, Canada, Western Europe, Africa or Australia (Wiśniewski 2009, 163).

In the opinion of the interviewees, one of the factors influencing their choice of the destination was Poland's educational potential and the possibility of obtaining free university education. Before 1990 university studies were the main reason why Lebanese people came to Poland. This is confirmed in one of the interviews: "As far as I know many Lebanese people are studying in Poland, maybe fewer now, but my mother's generation... My mother has many Polish friends with Lebanese husbands, they met while studying in Poland, so it's not a rare case. When I'm in Germany, Canada or France, I meet Lebanese people who studied in Poland – they can name some Polish cities or say a few words in Polish. Studying in Poland is not unusual" (woman, age unknown, W1). According to the interviewees, the choice of Poland was not accidental, it was influenced by previous experience of family members and also by more prosaic factors: in Poland university education was free and costs of living were significantly lower than in Western European countries. Nowadays, the independent Poland also attracts Lebanese people with relatively cheap university studies, however the interviewees often said that Polish university diplomas are not as prestigious as the ones from Western European universities. In recent years Lebanese people have been settling in Poland because they married Polish women or set up companies here. Moreover, constant armed conflicts in the Middle East resulted in the increased number of Lebanese people of Polish origins coming to Poland. However, most contacts between Poland and Lebanon still have private character. "Polish policy regarding Lebanon has no name, and I don't think they'll pay attention to this in the near future" (man, age 49, W9)

According to respondents, the Lebanese in Poland assimilate to a large extent and without major problems. Of course, it is easier for Christians due to cultural and religious similarities. However, many Muslims, especially those who came to Poland before 1990, have not had any problems with functioning in our country. The biggest barrier was the language, yet most respondents learned it relatively fast thanks to language courses for foreign students and their own cultural capital. The command of several foreign languages was not unusual among immigrants – most of them spoke Arabic, English and French. In some cases the respondents were not limited to these languages. It should be emphasized that the respondents stressed Poland's educational potential. The relative ease with which the Lebanese adapt to the life abroad stems from their experience of living in an open, multi-religious society which the Lebanese society used to be before the numerous conflicts. This refers primarily to people coming from intelligent families living in big cities. However, this is not a rule. The assimilation of people who came to Poland in the time of communism might have been facilitated by their left-wing political views. They came from Lebanon to a socialist country that to some extent met their ideas of equality. What is surprising, is the large group of respondents who call themselves atheists or non-religious. Those are mostly immigrants from cities who came to Poland before 1990. The younger generation, regardless of religion, more frequently declare themselves as believing and practicing.

Basing on the interviews, it can be said that the Lebanese do not have major problems with living in Poland. Most of them are doing well, they achieve good financial standing and are accepted in their environment. People who settled in Poland are business people, doctors and engineers. Their competence acquired both in Lebanon and in Poland contributed to their satisfying standard of living in the 'new' country (Wiśniewski 2016).

2. HISTORY: SIMILARITIES AND DIFFERENCES

One of the main similarities between Poland and Lebanon indicated by the respondents is complicated history of the two countries. "Surely there are similarities, in Poland there was German occupation, in Lebanon – Israeli, and last year there was a war in Lebanon – Poland had many wars" (man, age 43, W3). From the 16th century Lebanon was a part of the Ottoman Empire, and after the First World War it virtually became a French colony (Madeyska 2003, 42-56). After World War Two it took part in the conflict of Arabic countries and Israel. In 1975 a civil war between Muslims and Christians broke out, with frequent interventions of Syria and Israel (Schulze 2010, 87-96). This war brought a prosperous country to the edge of bankruptcy. "As for Poland, it was under foreign occupation for many years, that's why the present situation is like that. Polish economy does not equal the Western countries because Poland was always a colony or was divided. Polish people had to rebuilt their country from scratch while others were creating empires. Therefore, regarding history, there's a similarity. For four centuries, until the end of the First World War, Lebanon and the whole Mediterranean region was occupied by the Turks. The Turks were worse than the Germans. They didn't allow to create schools, illiteracy spread together with diseases. If a person is illiterate, he's ignorant and dumb. If he can't read, he can't tell the right and wrong. There's no knowledge; if there's no knowledge, there's no medicine; if there's no medicine, there are diseases. It's a vicious circle (man, age 61, W2). Respondents believe that the similar history may be the result of geographical location. "In Poland there were Russians and Germans, in Lebanon – Turks and the French. Poland is a kind of country of which everyone wanted a piece and everyone took a piece, it's the same in Lebanon... Poland is also a bridge between the East and the West" (man, age 43, W12). The only difference between the two countries, as one respondent said, was that Lebanon could count on the support from the French. Poland did not have such help. "Lebanon is now in such situation. On the one side of Poland there was Germany, which was an aggressor, we have Israel. On the other side there was the big brother, in our case it's Syria, so the country is between a rock and a hard place, yet Lebanon can count on French support in its contacts with European Union" (man, age unknown, W7). Both nations showed similar determination in their struggle for independence. "Lebanon was under strain for a long time. Both countries didn't allow others to control them" (man, age 52, W15). History was

not favourable for either country. For centuries strong and aggressive neighbours posed a threat to both Lebanon and Poland. Lebanon, which for almost four hundred years was a part of the Turkish Empire, gained independence only in the 19th century. Lebanese people organised uprisings against the occupant, however, as in the case of Poland, they were unsuccessful. After the fall of the Ottoman Empire, Lebanon was under French influence. After the Second World War they gained independence, but the young country had to face its powerful neighbour – Israel. In addition, Syria and Iran regard Lebanon as their area of influence. Last several years have seen constant wars, military interventions of neighbouring countries, Israeli occupations.

When looking at Lebanon's recent history, we can find many analogies with the history of Poland. Partitions, uprisings, attacks of neighbouring countries on the young state which regained independence after 123 years of occupation. Sacrificing the future of Poland for the interests of foreign powers. Even the Targowica Confederation resembles slightly Lebanese civil war. In both cases the conflict was brought about by neighbouring countries which benefited from the fratricidal war. Yet common experience can be found not only in war memories. Elżbieta Reklajtis finds universal message in the works of two great poets: Lebanese – Khail Gibran and Polish – Cyprian Kamil Norwid (Reklajtis 2010, 8-9).

3. CLIMATE

Surprisingly, many respondents talked about similarities of climate and landscape between Poland and Lebanon. Although Lebanon is a Mediterranean country, geographic features of the land (mountains) result in diverse climate conditions. “The climate is similar; in Lebanon we also have mountains, and if somebody lived in the mountains, in winter the temperature can reach minus five. On the coast, where I lived, temperature in winter is about 10-15 degrees, but in the summer it's a disaster” (man, W4). Obviously, people who came from the coast and did not live in Lebanese mountains said that the climate was one of the main difficulties in getting used to new living conditions. It referred not only to cold winters, to which they were not accustomed (one respondent got frostbite during his first winter in Poland), but also to cold and wet summer. But for people coming from Lebanese mountains it was not a problem. “No, no, I come from the cold climate, from Balbek, there, over one thousand meters above the sea level, winter is real, it must be minus twenty, it's real, there's a lot of snow, it snows a lot, it's thick, often a meter thick, after a few sunny days the snow slowly melts, but on mountain tops the snow doesn't melt until next year, from one winter to another, there is always snow on tops of Lebanese mountains, that's why the climate was not a problem for me, not at all” (man, age 37, W10). Contrary to stereotypes, snow was nothing new or surprising for the Lebanese. “There is snow. Where I come from, there is snow. And where I was born, there is always snow (laughs).

Lebanon is a small but diverse country, we have snow and four seasons, and I didn't have problem with adjusting to the temperature and the weather" (man, age 49, W9). Another geographical feature of the two countries was mentioned by one respondent. In his opinion, not only the climate is similar. "I think that Poland and Lebanon have a lot in common. Poland lies in the centre of Europe, many things go through it, trade routes. It's the same with Lebanon. Nature and landscapes are similar" (man, age 42, W17). Similar climate makes it easier for many Lebanese people to adjust to Polish conditions. It is even more so because, as many respondents said, the climate in Poland is getting warmer and scorching summers more and more resemble the summers in Lebanon.

4. HOLIDAYS

One of the most important issues connecting the two countries is the way of celebrating holidays, especially religious ones, and, in broader perspective, the question of religion. "I am a Catholic, everything here looks like in Lebanon. Meeting the family... As for Easter, it's the same as in Lebanon, Christmas is also the same" (man, W4). This applies not only to Christians, and results from the character of Lebanon, which is a multi-religious country. "I come from Lebanon, and Lebanon is a multi-religious country, which means that we all live together, we celebrate holidays together – Christian, Muslim and other, regardless of religious denomination, and as far as this is concerned, we are very tolerant. Therefore, it was not the first Christian I saw, I lived among Christians, I visited a convent and attended a school run by friars. It was not a shock for me" (man, age 49, W9). The issue of celebrating religious holidays was not a problem for any of the respondents. Regardless of their initial religion, many Lebanese people attend church services with their Polish families, celebrate Catholic holidays and accept raising children in the Catholic faith. "I come from a community where we celebrated state holidays, we celebrated holidays with Muslims, with Jews, with Christians... with everybody. For me every holiday is a holiday! When I grew up I noticed the difference between Muslims and Christians. We (celebrated) with Muslims, our family with Christians, there was Christmas, but it was more symbolical than here. A person is formed by their environment... My environment was a mixture of Christians and the Druze. The Druze is a group which comes from Islam but now is autonomous. They are a little similar to Christians, a little to Muslims (in their tradition), but they are in between. I lived in a mixed environment. For me the presence of church was nothing strange – I was familiar with it. I went to a mixed school, in Lebanon we also had schools which were not mixed. There were different ethnic groups and boys and girls. It was a reputable school" (man, age 61, W2). What is surprising, is that most respondents rather celebrate Catholic holidays than holidays connected with their religion. This brings about the problem of transferring the culture of their country of origins to their children. Although many Lebanese people regularly visit their

country, in many cases their children do not speak Arabic and do not know the culture of their “second homeland”. In the homes of Lebanese men whose wives are Polish, and such constituted the majority of respondents, the main language spoken is Polish. Very often the first regular contact with Lebanese language and culture after many years of emigration was through satellite television.

In this place we should touch another issue important for emigrants, namely the food. It was the food that was indicated by the respondents as the main difference between the two countries. This subject was mentioned by both Christians and Muslims, especially those who came to Poland before 1990 and in the early 1990s. The food in communist Poland was poor and monotonous. They had come from a country where people eat plenty of fruit and vegetables, and the number and variety of dishes eaten during one meal is impressive. In Poland they were served the same meal for years – potatoes and a piece of meat. Only in the 1990s food became more varied and different kinds of food were available. What is important, even those emigrants who did not teach their children Arabic or assumed Polish way of celebrating holidays, still prepare Lebanese dishes.

To sum up, Lebanese people in Poland do not have problems with cultural isolation, adjusting to unfamiliar living conditions, the system of values connected with religion nor the way of celebrating holidays. Especially elder people who came from tolerant, multi-religious Lebanon, where diversity is respected. They came to a country where the dominant religion and traditions, for example celebrating holidays, is similar to Christian traditions present in Lebanon. Churches, monasteries and priests are the same. People on the streets dress in the same way in Lebanon and in Poland. Therefore, there is no cultural gap as in the case of immigrants coming from the countries where one religion, e.g. Islam, is dominant (as it is mentioned by one respondent). All those factors helped the Lebanese to adjust to living in new conditions.

5. FAMILY RELATIONS

Another similarity between Poland and Lebanon is family relations. “Polish families are similar to Lebanese, they are completely different than in other European countries. People stick together here, they live together, and there the families have fallen apart and everybody lives for themselves. In Lebanon people also live together, whole families” (man, age 43, W3). This similarity has both cultural and economic reasons. “Yes, there are a lot of similarities. Of course not everything is the same, but Poland has this oriental feeling, because Poland is an Eastern country. Maybe it will vanish in the future, but I hope not. I think you can raise a child well both here and in Lebanon. There are a lot of good people in Poland, for example John Paul II. There are differences in Lebanon, too (...) I think yes, they are similar, but since Lebanon is a small country, family ties are stronger. In Lebanon traditions are stronger, too. In general, family relations are

similar (mentality, family reunions, etc.). If we wanted to put it on a scale, I'd say that in Poland 70% of family relations are very good, in Lebanon it's 90%." (man, age 37, W10). The respondents did not notice major differences in the manner of raising children. In both countries parents try to give their children the best start in the adult life, except some pathological cases, of course, which can happen everywhere. "As for family matters, I noticed here that the family, that is mother and father, if they are normal, try to take care of their home, of their children. In Lebanon they also look after their children, if they are normal, I mean. They take care of the children's future and their education" (man, age 61, W2); "I think they are, because, generally speaking, the Polish protect their children in the same way as the Lebanese. Parents always look after their children" (man, age 43, W12). "It's the same thing. In Lebanon when a child is born, the family think what to do, to what school send the child. Now it's the same thing" (man, age 30, W23). The respondents noticed that the differences in this area have appeared in recent years and are connected with economic changes in Poland. In Lebanon, family members still have more time for each other, life goes more slowly, and the time spent together is celebrated (Reklajtis 2000, 85-103). In Poland both parents usually work, very often they work long hours and they live far from the place where they were born. As a result, they do not have time for their children nor for their parents. Therefore, family ties become looser and Polish families more and more resemble families in other European countries, which the respondents think has a negative impact on Poland's future. Lack of time also impairs the control of children, this is why, according to one respondent, the problem of young people using drugs is lower in Lebanon. Polish children have more freedom in their everyday life. "Yes, rather yes. A lot of similarities. But children in Poland have more freedom" (man, age 62, W16).

Another similarity mentioned by the respondents is hospitality. "You must say objectively that Arabic people are hospitable, but Polish people too" (man, age 57, W22). It was indicated even by those respondents who did not see any other similarities. "One characteristic which is common for the Polish and the Lebanese is hospitality. In general, they cannot be compared, the two countries are completely different" (man, age 47, W6). The similarities between the two countries: attitude to family, ways of raising children, respect for the parents, allowed Lebanese people living in Poland to have lasting and apparently happy relationships and families. Only one of the respondents talked about a break up with a Polish partner (which did not "scare" him from further attempts to settle down in Poland). In other cases marriages of Lebanese men and Polish women seem quite happy. Relationships with in-laws and other family members do not pose any problems, either. Respondents talked of close relationships and frequent visits. It can be assumed that respect shown to elders, care for the wife and resourcefulness made Polish families accept Lebanese husbands regardless of religious differences.

6. LIFE EXPERIENCE

According to most respondents, similar history of Poland and Lebanon resulted in similar experiences of their citizens. For example, many had to leave their countries. As it was said, many Lebanese people are living abroad. Similarly, millions of Polish people are living outside Poland. "I can see a similarity in the fact that so many Lebanese people are living outside Lebanon, apparently a few times more than in the country. Lebanon is a small country, three–four million people, and there are a lot more people of Lebanese origins around the world. In this respect, Poland and Lebanon are similar because many Poles are living outside Poland, it's estimated on fifteen million" (man, age 57, W22). Common experience of war and poverty created other similarities. "These are two nations which enjoy life, they love life. That's why the Lebanese adapt so easily in Poland and the Polish in Lebanon. There are religious differences, but if it's a Pole, there are no problems" (man, age 50, W24); "We are open people. We are resourceful, hardworking, hospitable, and we can assimilate in any country, any nation. I could say the same about the Polish" (man, age 61, W21). The similarities are not always positive. Respondents asked to describe the Lebanese said for example: "A good man but stubborn like a Pole" (man, age 37, W10). "people with entrepreneurial spirit can resemble Poles who are masters at contriving things and dealing with difficult situations" (woman, age unknown, W1).

SUMMARY

To sum up, the research shows that Lebanese people do not have major problems with adapting to life in Poland. Most of them are not planning the return to Lebanon, even if they say they are thinking about it. They came to Poland, adjusted to the life here and they feel Polish to the same extent as they feel Lebanese. It has been facilitated by history, family relationships and, in some cases, even the climate. Lebanese people who are coming to Poland nowadays are looking for a place where they could live, do business, raise children. Now it is not a big group, but it can be assumed that the number of Lebanese immigrants in Poland will increase considering the fact that there are no signs that the situation in Lebanon might improve. Immigrants are coming to a new Poland which is undergoing an economic change. Family relations are changing and they resemble, to a large extent, Western European countries. There is a change in the way of raising children who, with falling birth rate, become most important in a family. This can be hard to accept for people brought in traditional Lebanese society. This cannot be compensated by an easier access to the kinds of food the immigrants are used to.

A question can be posed whether young Lebanese people will adapt to life in Poland as easily as their older countrymen. The research is not conclusive in this matter. One can notice a change in the character of Lebanese immigration

to Poland. Before 1990 and in the early 1990s the dominant group was students. Very often Poland was an accidental choice. They had not planned to stay here, yet their life turned out this way. They got education, made careers, started families. Presently it can be seen that Poland is no longer a transit country, it has become a final destination.

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SALESIAN WORK WITH SOCIALLY-MALADJUSTED YOUTH PERCEIVED FROM THE VIEWPOINT OF PARADIGMATIC FOUNDATIONS OF CONTEMPORARY SOCIAL REHABILITATION³

Abstract

In this article, the authors tackle the issue of Salesian social rehabilitation perceived from the point of view of the paradigmatic foundations of contemporary social rehabilitation.. The article is based on the analysis of available literature on the subject. The analyzes undertaken allow to state that the Salesian preventive system fits into the paradigms of social rehabilitation in the Polish context. Therefore, the presented analyzes prove that this system correlates with paradigms functioning in contemporary social rehabilitation practiced in relation to socially maladjusted youth.

Keywords: Salesian preventive system, maladjusted young people, social rehabilitation, paradigms

PRACA SALEZJAŃSKA Z MŁODZIEŻĄ NIEDOSTOSOWANĄ SPOŁECZNIE
POSTRZEGANA PRZEZ PRYZMAT PARADYGMATYCZNYCH PODSTAW
WSPÓŁCZESNEJ RESOCJALIZACJI

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Abstrakt

W niniejszym artykule autorzy podejmują zagadnienie resocjalizacji salezjańskiej postrzeganej przez pryzmat paradygmatycznych podstaw współczesnej resocjalizacji. Artykuł opiera się na analizie dostępnej literatury przedmiotu. Podjęte analizy pozwalają stwierdzić, że salezjański system prewencyjny wpisuje się w paradygmaty resocjalizacji w kontekście polskim. Ukazane analizy dowodzą zatem, że system ten koreluje z paradygmatami funkcjonującymi we współczesnej resocjalizacji praktykowanej w stosunku do młodzieży niedostosowanej społecznie.

Słowa kluczowe: salezjański system prewencyjny, młodzież niedostosowana społecznie, resocjalizacja, paradygmaty

INTRODUCTION

Social rehabilitation measures employed by the Salesian preventive system fit to a certain extent into the society-based rehabilitation agenda, the goal of which is to allow a socially-maladjusted young person establish a relationship with the local environment (develop bonds with the local community), thus creating certain goods or services that are beneficial for the society. At the same time, such a person gets engaged in the educational system, taking part in vocational training, organized leisure time (sports and recreation) as well as social and religion-related activities (Bałandynowicz 2012b, 18). Theoreticians of the prevention system claim that the concept of the Salesian prophylaxis is founded upon a well-defined philosophical background, characterised by adequate understanding of ontological, anthropological axiological and christianological issues (Marszałek 2005, 386-399).

This paper is intended to provide an analysis and demonstrate how eligible it is to perceive the Salesian preventive system, applied in social rehabilitation conditions, from the perspective of paradigmatic foundations noted in contemporary social rehabilitation. In connection with what has been said above, it is worth pointing out the position of A. Jaworska, who emphasizes the importance of contemporary paradigms in social rehabilitation (Jaworska 2009, 137-148). I would also like to mention that the above work by A. Jaworska provided an inspiration for this article and the paradigms developed by the author also found their expression in this article.

1. PARADIGM OF FILLING THE EXISTENTIAL VOID VS. ORIENTATION TOWARDS DISCOVERING THE MEANING OF LIFE

One can hardly disagree with the statement that social rehabilitation of socially maladjusted young people is a process of an individual's transformation (Kieszkowska 2010, 263-278). Such a process would mainly involve erasing the present contents from a person's consciousness and introducing new ones, thus transforming his or her perception of the world and environment, reconstructing one's own image and one's identity (Szacka 2003, 154-155). In this context, it is possible to refer to a specific existential/axiological void, which develops in the lives of young people

who violate laws and morals. Scholars suggest that this void may be filled with values. Consequently, social rehabilitation would be focused on encouraging young people to choose values and subordinate them to a specific hierarchy of values based on the social hierarchy of such values. An important element in this context would also be the process of the adjustment modification of the hierarchy of values to pupil's individual characteristic, that is, their subject (personality and character) as well as object (environment) specificities (Kuč 2005, 141-142).

While analysing the Salesian preventive system from the theoretical perspective and looking at its application in social rehabilitation conditions, it must be said that it fits perfectly into the paradigms of the contemporary social rehabilitation. The system regards and treats pupils and their social rehabilitation process in a highly integral manner. Constant emphasis on the meaning of existence and life in this system (the value of life and self-improvement), stressing the quality of interpersonal relations between young people and significant others (the tutor as a father, friend and master roles) – it all brings social rehabilitation efforts closer to modern rehabilitation trends. In the prevention system, that existential void felt by a young person is filled not only with strictly external actions (ergotherapy, doing sports, etc.) but most of all by integral therapy in the spirit of prevention, which affects various dimensions of a young person's development: somatic, moral (establishing own moral core and reference points), cognitive, interpersonal (assistant-pupil relations) as well as the spiritual dimension (Stańkowski 2015, 279-289).

2. RELIGIOUS ASPECT IN THE PARADIGM OF OPTIMISTIC THINKING

In the paradigm of optimistic thinking, a significant role in social rehabilitation is played by religion, which not only opens socially maladjusted young people or prisoners to the issue of reconciliation with God, thus becoming an impulse to undertake the process of transforming one's life, but also guarantees in a certain way the individual's sense of safety and reinforces people's belief that the victory of good over evil and life over death is possible (Makselon 1995, 255-281). As scholars assure, an optimistic view of one's own life through the lens of faith triggers the willingness in pupils to form the image of their own humanity, which helps them develop a mature personality in somatic, psychological, social and spiritual dimensions (Kalinowski 2005, 150).

B. Stańkowski's investigation in terms of using the prevention system in social rehabilitation conditions demonstrate that in the said system a pupil/Christian is perceived as an individual on his/her way to perfection in the moral, agathonistic and religious dimensions. In this context, religion provides moral notions which enable young people to build/ arrange and evaluate the world. Religion is the source of hope also in the Salesian context and it introduces young people to the soteriological dimension (my existence extends beyond the material dimension, which implies the possibility of looking with hope at one's own life as well as of

improving oneself following the example of spiritually-wealthy people). In addition, religion in the prevention system satisfies the human need of transcendence and following higher values as well as subjecting one's instincts to those higher values (optimistic thinking in the scope of moral, ethical and agathonistic issues) (Stańkowski 2012, 339-365).

3. OPTING FOR THE POSITIVE ASPECT OF PUPILS' FUNCTIONING IN THE SOCIAL REHABILITATION PROCESS

In paradigmatic foundations of the contemporary social rehabilitation, it is stressed that there is also a necessity for the pupil to do good. This necessity stems from the human need to do good for other people and it is, therefore, understandable that social rehabilitation efforts concentrate on capabilities and powers of young people, on their urge for the self-expression of the inner good. The optics of doing good for oneself and other people is consistent with the activities which comprise art therapy programmes aimed above all else at obtaining constructive changes of personality in the structures of self-assessment and positive reorganisation of perceiving the surroundings, which have so far remained in a falsified form. As stressed by scholars, therapy/rehabilitation through artistic creation is an important form of work oriented towards discovering good in oneself and attempting to express this good, as well as opening to changes that may occur in the sphere of values (Florczykiewicz 2011).

As it refers to the achievements of personalism, the Salesian pedagogy chooses to treat pupils subjectively so that they gradually become protagonists of their own lives. Thus, the activities based on the preventive system are focused on bringing out what is invisible in pupils since humans are born as human beings but they strive to develop their own transcendental nature and personality, which is ontologically inclined to the good (self-improvement) (Lemoyne 2020). The studies prove that pupils in the Salesian practice are approached as important and unique subjects, endowed with numerous positive features and equipped with internal dynamisms which allow for the externalisation of the good inherent in them. For that reason, it is not uncommon for the Salesian practice to promote charity or work of the socially maladjusted youth to the benefit of social community and educational institutions (e.g. pupils' participation in activities in kindergartens) (Stańkowski 2015, 213, 218-219).

4. PARADIGM OF SELF-REALISATION

In modern intellectual trends in the scope of humanistic and transpersonal psychology, scholars accentuate subjectivity to emphasise that if human beings have their own sense of subjectivity, i.e. when they gradually become a subject, thus gaining an impact on the events and at the same time causing and receiving everyday experiences, then such people also develop in themselves an inclination

to take responsibility for their own life (making active decisions about taking responsibility for one's failures) (Maslow 1977; Rogers 1970). A philosophical trend of personalism contributes significantly to the understanding of subjectivity, emphasising human dignity and the right to self-determination of oneself while also objecting to the instrumentalization of the human being. Such emphasis on the personalisation process is important in social rehabilitation; following the thought of John Paul II – development of people and their upbringing is to be a process of becoming a human being (Iwański 2020).

The issues of self-realisation and subjectivity in the preventive system should also be understood in the spirit of personalism. The mere upbringing practice of Giovanni Bosco itself proves that the focus of upbringing had always been the pupil perceived in the categories of protagonism (Cian 1985, 199). Therefore, pupils' active engagement is required as a condition of their advancement and upbringing. It is worth noting that the entire educational activity of Giovanni Bosco was intended to awaken empowerment in pupils, thereby making them the first responsible one and the first cause of their development. Thus, the perceived self-realisation of an individual required a complete cooperation between the tutor and the pupil and it was an element of a holistic vision of pupils with orientation towards their moral, intellectual and physical development (Ricaldone 1953, 144). Hence, self-realisation on the part of the pupil in the Salesian perspective relied on cooperation transforming into a complete self-education that comprised inspiring, motivating, supporting and reinforcing pupils on the way towards self-upbringing (Braido 1967, 190).

5. RESPECTING THE OTHERNESS OF PUPILS

The authors dealing with social rehabilitation of prisoners and socially maladjusted young people emphasise the need to differentiate the approach towards both groups (Lipkowski 1976, 282-285). The paradigm of overcoming the routine and respecting the otherness of pupils is therefore becoming a practice resulting from obtained diagnoses concerning life trajectories of the law-conflicted individuals, from analyses of the previous legal offences or mental states of the youth as well as behaviours of juveniles and prisoners during various activities (sports, therapeutic, recreational, etc.). In this context, the authors refer to the principle of individualisation in social rehabilitation measures (Siemionow 2014, 44). The authors also emphasize the need to respect the pupil's subjectivity in social rehabilitation (Fidelus 2008, 219-220). The principle stems from the complexity and uniqueness of bio-social characteristics of each pupil. Consequently, the differences pertaining to personality features or social circumstances of the pupil should discourage from taking a "one-size-fits-all" approach (Górecki and Stachowiak 2002, 23). Also, the Polish legal system provides social rehabilitation measures on the basis of subjective, objective and environmental criteria of individualisation (*Ustawa* 2020).

The priority in the prevention system is getting to know pupils in terms of their character, disposition, aspirations, as well as in the aspect of upbringing-related efficiency of the family (financial situation, pathologies, etc.) (Marszałek 2010, 535-539). Theoreticians of preventive systems emphasise the very role of the principle of individualisation in the upbringing process. An individualised concept of upbringing provided in the Salesian preventive system promotes above all the pupils' subjectivity, the level of their development and the need to tailor their upbringing efforts to the specific character of individual pupils (Marszałek 2010, 611-620). Other studies confirm the involvement of Salesian upbringing communities in respecting the broadly-understood uniqueness of pupils, demonstrated in applying drama therapies, arts therapies, etc., in which pupils experience an individual approach to the process or social rehabilitation (Stańkowski 2015, 212-214).

6. PARADIGM OF RESPECTING PERSONAL DIGNITY OF PUPILS/ PRISONERS

According to scholars, a society pursuing to respect democracy and principles of cohabitation should follow the principle of respecting dignity of the human being and objecting to any forms of criticism (Marzec-Holka 2000a, 9). It is also assumed in the context of social rehabilitation that this process should concentrate not only on organising education for pupils and creating possibilities of preparing for professional work, but also on respecting dignity of young people living in upbringing centres and opting for the dimensions of cultural, sports or relational activity in undertaken efforts (Ostrowska 2008).

The Salesian preventive system also fits well into the paradigm of respecting pupils' dignity. As noted by B. Matyjas, the issue of bringing up a human being was the fundamental one to Giovanni Bosco, which is why the said system was deeply rooted in human experience and tradition of the Church (Matyjas 1996, 9). We have already mentioned that the Salesian upbringing is founded on a personalistic approach to a human being, putting pupils in the centre along with their dignity and freedom to self-realisation. A starting point in the preventive system is the conviction that pupils are children of God, have dignity, the respecting of which is a prerequisite to reach pupils' hearts. Respecting pupil's dignity in the Salesian educational/rehabilitation practice reveals itself mainly through understanding pupils (episodes from their lives, which determined a form of life and interactions), in a profound familiarity of pupils in various situations of their lives (family, school, sports field, relation with others) as well as looking at pupils as if with their own eyes.

7. PREVENTING STIGMATISATION/ DE-STIGMATISATION OF PUPILS

A social stigmatisation process may begin after young person's return to his natural environment, and thus become a source of new exclusion and continuation of social maladjustment from the past (see more in: Baładynowicz 2012a, 37-

63). Assuming that people create their identity on a continuous basis (Gałdowa 2010, 130), we must acknowledge that deviational identity of socially maladjusted individuals may also be subject to a conversion (Kubiak-Krzywicka 2008, 154-156). In this perspective, scholars postulate the necessity of minimal intervention linked with avoiding stigmatisation of adolescents (Düinkel and Junger-Tass 2009, 144-146). De-stigmatisation is referred to as the process of cancelling people's deviational identity and transforming its dimensions into parameters acceptable in the social sphere. This process is carried out through an individual's realization of the wrong in the current life, emergence of doubts about the legitimacy and usefulness of performing the current role (e.g. the role of hooligans, criminals) (Pindel 2009, 101-102). The process of de-stigmatisation would, therefore, be linked with transforming one's "individual Self and social deviational Self" into the normative Self (Konopczyński 2009, 61-62). M. Konopczyński refers to this process as dressing new identity costumes, created by temporal and interpersonal factors, the source of which are unconventional methods of creative social rehabilitation (see more in: Konopczyński 2006). E. Pindel indicates that this process is not an act of a one-time decision or incidental action, neither is it carried out in a vacuum but it depends on many factors, both favourable ones, arising from unpredictable coincidences or intentionally introduced (Pindel 2010, 121).

The pedagogical message of Giovanni Bosco is also important in the Polish context of social rehabilitation, where - as stressed by numerous authors - one has to deal with "false social rehabilitation - the rehabilitation of appearances" (Marzec-Holka 2000b, 375-389). However, B. Stańkowski's investigations in this area have led him to the following conclusions: a) thus far, no theoretical considerations have been developed with regard to preventing stigmatisation in the spirit of preventive systems in Polish deliberations on such a system; b) at the present stage of development and the existing papers on preventive systems, the emphasised elements are mainly those of the role of practical influences, the strategy in reducing the process of youth stigmatisation (Stańkowski 2015, 200-206). Recent studies confirm that the need that socially maladjusted young people initiate contact with an external world, develop their own initiative and escape potential stigmatisation is not common. In many situations, it depends not only on pupils' difficult past (staying in other centres, escaping, pathological situation in family homes) but is also related to personality determinants of pupils (Stańkowski 2018, 48-49).

CONCLUSIONS

The considerations proposed in this article led me to the following conclusions:

1) Having been analysing theoretically the Salesian preventive system and looking at its application in the context of social rehabilitation, I conclude that it significantly fits into the paradigms of the contemporary social rehabilitation.

2) The said system also points to the person-centrism that grants subjectivity to pupils. It also demonstrates clear references to Christian values and intentional environment creating optimal environment of promoting the person.

3) The emphasis in the Salesian social rehabilitation on the meaning of existence as well as on the value of life and quality of interpersonal relations prove that social rehabilitation efforts using the preventive system are consistent with the current trends in social rehabilitation of Polish socially maladjusted youth.

4) This consistency is also visible in the way that pupils are treated: opting for positive aspects of their functioning, opportunities for a complete self-realisation on the part of a young person (supporting the process of upbringing), respecting pupils' uniqueness demonstrated by an individual approach to every pupil. The last two paradigms, functioning in Polish social rehabilitation, are also reflected in the Salesian upbringing efforts for socially maladjusted adolescents. On one hand, it is showing respect to pupil's personal dignity, not encapsulated in only theoretical considerations but mainly aimed at encouraging young people to discover and personally experience their own dignity. On the other hand, these are efforts to the benefit of adolescents, aimed at their de-stigmatisation.

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MISSION STATEMENTS AS A BASIS FOR REFLECTION ON THE PRIORITIES OF THE GENERAL SECONDARY SCHOOL²

Abstract

The article provides an analysis of general secondary school mission statements of 53 schools from the public sector in Warsaw. The purpose of the study was to gain a perspective on the school's priorities as defined by secondary schools themselves. The qualitative content analysis revealed that mission statements highlight the broad range of goals that the schools pursue. Some of these goals may be thought of in terms of educational results, while others may be seen as educational "inputs". The obtained results show that schools share certain priorities, but there was also a range of "specific" objectives that the educational institutions pursue.

Keywords: the purpose of school, school mission statements, general secondary school, qualitative content analysis

MISJA SZKOŁY JAKO PODSTAWA REFLEKSJI O PRIORYTETACH LICEUM OGÓLNOKSZTAŁCĄCEGO

Abstrakt

W artykule przedmiotem analizy uczyniono misje 53 publicznych liceów ogólnokształcących zlokalizowanych w Warszawie. Celem badań było ustalenie, jak szkoły definiują swoje priorytety. Na podstawie jakościowej analizy treści misji badanych instytucji ustalono, że szkoły deklarują orientację na różnorodne cele: zarówno te opisujące oczekiwane efekty kształcenia, jak i te związane z charakterystyką środowiska instytucjonalnego szkoły. Zaprezentowane wyniki pozwalają dostrzec specyfikę misji badanych szkół, mimo pewnych podobieństw w definiowaniu przez nie swoich priorytetów.

Słowa kluczowe: cel szkoły, misja szkoły, liceum ogólnokształcące, jakościowa analiza treści

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INTRODUCTION

For some time now, many pedagogical studies have been focused on comparing schools based mostly on educational outcomes (e.g. Coleman, Hoffer and Kilgore 1982; Lubienski and Lubienski 2006). Such an approach seems to stem from the assumption that schools are homogeneous as far as their overall purpose is concerned. However, as early as in the Antiquity, philosophers concerned with education considered different goals of school. For example, Plato, Aristotle or Confucius wrote about the purpose of schooling in their respective cultures (Noddings 1995). Over the following centuries, the debate on the meaning and aims of education was still ongoing with participation of such great thinkers as Rousseau, Pestalozzi, Herbart, Froebel or Dewey, to name only a few.

The purpose of schooling is still very much a relevant issue, and the notion of school mission statement is analyzed from various points of view: academic, legislative, legal, entrepreneurial, international, and institutional (Stemler and Bebell 2012; Stemler and DePascale 2016). Theorists, researchers and policy makers, as well as the general public, all recognize that schooling has multiple purposes. However, there exists little empirical work examining the viewpoint of the school itself on its priorities. Such research may be particularly necessary in Poland, as there are currently very few studies exploring the issue of the mission statement. These studies, however, have generally been conducted as part of projects concerning the organizational culture of schools, rather than aimed at a systematic and in-depth exploration of the values, objectives, and tasks of the school as an institution (e.g. Polak 2007).

This paper reports on the empirical data collected in a research project with a twofold objective: (1) gain a perspective on the school's priorities as defined by secondary schools themselves; (2) understand how school principals perceive and interpret the mission of their school. The aim of this article is to present the results of the study to show how the sampled public general secondary schools define their own role and purpose themselves.

The article consists of two main parts. The first concerns the notion of the mission statement as an important summation of the priorities of an institution. Examples of previous empirical studies on this issue are presented. My research project focused on the mission statements of general secondary schools. For this reason, the purpose of secondary education is also discussed. In the second part, both methodological background and the results of my study are discussed.

1. THE NOTION OF MISSION STATEMENT

Interest in mission statements has significantly increased on a global scale in the past 25 years. Their overall significance has been studied in numerous areas in both profit and non-profit organizations (e.g. Khalifa 2012). In the literature on management, various definitions of the concept of mission statement as well as various

benefits of having a mission statement can be found (Alegre et al. 2018). For example, Ekpe states that a mission statement is a brief and formalized document intended to distil an organization's purpose, values and function (Ekpe, Eneh and Inyang 2015, 135). It is a declaration of an organization's "reason for being" and distinguishes one organization from other similar enterprises (David, David and David 2014, 96-98). It is a set of long-term goals and objectives of the organization giving direction to the work of its members. It is a "self-definition" of the organization through answering the questions: "why does the organization exist?", "what is its purpose?", "whose and what kind of needs should it satisfy?", or "what is its social mission?" (Piotrowski 2000, 759).

Based on a review of the literature, it can be concluded that the process of articulating an organization's mission has at least two potential benefits: instructional and motivational. The first concerns the members of the organization. A clear mission helps them distinguish between decisions and activities that do and those that do not conform to the institutional priorities. Another benefit derived from a mission statement is a shared sense of purpose and a set of common values. It can inspire and motivate people within the organization and to communicate its characteristics, objectives, values, and history to key external entities (Morphew and Hartley 2006, 457).

It is worth adding that over the past decade, mission statements have become an increasingly popular management tool (e.g. Cardona and Rey 2008). Some researchers point to the value of mission statements in expressing a vision for an organization's future. Others stress that mission statements play numerous roles in an organization's present and future situation (e.g. Williams 2008). A clear definition of the purpose of an organization enables it to survive and develop.

However, many scholars and practitioners see – as Morphew and Hartley put it – "the mission statement glass as half-empty" (2006, 457). In line with this approach, mission statements are considered a "collection of stock phrases that are either excessively vague or unrealistically aspiration or both. From this perspective, mission statements ultimately fail to follow through on or convey any noteworthy sense of an institution's current identity" (Morphew and Hartley 2006, 457). Others, in turn, emphasize that a mission statement is made effective and real only when it is formulated jointly by the representatives of all stakeholders and when it serves as a guidance (e.g. Sufi and Lyons 2003).

The mission statement was adopted by schools from the corporate sector. Simply speaking, it specifies why a school exists, and what its fundamental purpose is (Gurley et al. 2015). For Boerema (2006), the mission statement of a school actually articulates a set of values that answer fundamental questions about the purpose of education. It provides context for governance, decision making, and the way the school is managed.

According to Stemler and DePascale (2016, 60), "mission statements represent an important summation or distillation of an organization's core goals represented by concise and simple statements that communicate broad themes. Furthermore,

school mission statements are one of the only written documents outlining purpose that nearly all schools have". Therefore, school mission statements may be viewed as a valuable source of data on the purpose of the institution. They may offer an insight into its priorities, making it possible to monitor their changes over time, comparing schools with regard to their priorities and even make the schools play a greater role in the educational policy discourse (Stemler and Bebell 2012).

2. SCHOOL MISSION STATEMENT AS AN OBJECT OF THE STUDY

In recent years, we have observed an increasing interest in the school mission statement as an object of empirical studies. Scholars have noted the importance of the mission statement as an indicator of school effectiveness (e.g. Rutter and Maughan 2002), as a basis for creating a collaborative school culture (e.g. Gruenert 1998) or as part of a standard practice for strategic planning and school improvement program (e.g. Fritz 1996). There are studies examining the purpose and value of developing and stewarding the mission from the viewpoint of various groups of school stakeholders (e.g. Gurley et al. 2015). The answer to the question which competences should be viewed as fundamental to the core mission of a school is reflected in the assessment battery of comparative educational studies (e.g. PISA). Some very interesting findings are available showing how employers expressed their preference for educational outcomes and the most important competencies they felt were needed for college and university students to succeed in the labor market (e.g. Barwińska-Małajowicz 2012). An important direction of research that has been developing from the mid-1990s is also the work on the mission statement of higher education institutions (e.g. Kosmützky and Krücken 2015).

It is worthwhile to revise some examples of the studies concerning content themes or trends in school mission statements. In 2006, Stemler et al. studied the mission statements of 421 public high schools from ten states across the USA. The data were coded into 11 categories and then quantitatively analyzed. The researchers noted that despite the range of political and geographical diversity found in the sample, there was a clear consensus on some major purposes of secondary education across the schools. There were also significant differences in thematic emphases within states (Stemler, Bebell and Sonnabend 2011).

Slate (et al. 2008), in turn, focused on the mission statements of 100 elementary schools in Texas. Qualitative data analysis yielded 15 themes. Next, these themes were converted into numbers for statistical analysis. Quantitative analyses indicated significant differences between high and low performing elementary schools. The mission statements of high performing schools were more likely to include the themes of challenge and academic success, citizenship, empower, partnership, and social development than the mission statements of low performing schools. The researchers stressed that it was challenge combined with support that characterized the mission of the successful schools.

The idea of school as a “challenging environment” was also highlighted in the study on K-12 school mission statements carried out in 2011 by Stemler and Bebell. They studied the mission statements of a wide variety of American school types using a coding rubric to analyze the entire set of 111 mission statements. The results showed a general convergence on the importance of cognitive, emotional, and civic goals. However, notable differences by school type were also noticed. For example, the creation of a challenging school environment was observed more often in public middle school mission statements than in elementary schools. In addition, none of the Waldorf Schools sampled included any mention of elements related to challenging environment, while Apple Schools of Distinction tended to focus not only on emotional and cognitive goals, but also on providing a challenging environment. A strong emphasis on creating such a school environment was also found in Award Winning Schools (Stemler and Bebell 2012, 154-169).

A comprehensive content analysis of school mission statements was conducted in Australia. Allen et al. (2018) investigated trends in the priorities of Australian secondary schools. A stratified sample of school vision and mission statements across 308 schools from government, independent, and Catholic sectors in Victoria was analyzed using qualitative and quantitative methods. Findings indicated that academic achievement was the most common theme, with school belonging and mental health promotion themes cited by over half of the schools.

In this context, the study conducted by Boerema (2006) is worth mentioning. Using content analysis, he focused on statements from private schools in British Columbia, Canada, aiming to explore the diversity within the private school sector. The results of these analyses yielded interesting findings. For example, a considerable diversity was discovered between private school groups in the goals and objectives pursued by the schools.

The above-mentioned studies highlight the importance of school mission statements as a valuable source of data for reflecting on the schools’ priorities or comparing the purpose of schooling nationwide or abroad.

3. SECONDARY EDUCATION AS A LINK IN THE EDUCATION CHAIN

Based on the literature review, it can be concluded that traditional European forms of secondary education began as institutions serving universities, with the purpose of preparing young people for higher education studies. In brief, they represented an advanced stage of liberal education and a narrow gateway to higher social and occupational statuses (Benavot and Resnik 2007). Generally, from the historical perspective, secondary education has served many purposes: teaching mathematics, science, and social studies; selecting candidates for higher education; helping young people to develop socially; preparing them for productive life; forming responsible citizens and healthy parents, to name a few (Alvarez, Gillies and Bradsher 2003, 18).

Benavot and Resnik (2007, 52), exploring the developments in primary and secondary education across the world, point out that the historical transformation of secondary education involved at least three interrelated shifts: (1) the expansion of the purposes of secondary schooling, (2) the establishment of new selection mechanisms to ease the transition between primary and secondary education, (3) the development of diversified curricula, and school types that address the heterogeneous interests and needs of expanding student populations.

Nowadays, although the worldwide trend is that young people learn in multiple different contexts, the developmental role of the school, secondary education in particular, is still critical at the level both of the individual and of the nation. According to Alvarez, Gillies and Bradsher (2003, 13-30), the developmental purposes of a secondary school are not limited to creating workers or solving specific problems. It should promote critical general learning and problem-solving skills that can have a positive impact on health behaviors or involvement in civil society of young people. Lewin and Caillods (2001, 354-355) point out that secondary education promotes the development of a skilled and knowledgeable citizenry with access not only to the national but also to the global economy.

Recently, secondary education has also been confronted with a multifaceted audience. Higher education institutions, local and global communities, and the labor market all need secondary education to prepare students for their present and future respective endeavors (Alvarez, Gillies and Bradsher 2003, 89). Thus, the debate on the purposes of secondary school must involve many issues simultaneously.

4. METHODOLOGY

4.1. General background

The presented study was inspired by the research conducted by Stemler et al., who focused on goals and values in American education. My intention was to examine the nature of mission statements in public general secondary schools located in Warsaw. The aim of this study was to identify the broad themes in their mission statements. All mission statements were collected between July 1, 2018 and September 1, 2018.

4.2. Data source

A sample was created using information from the website of the Education Department of the City of Warsaw. There was a list of general secondary schools ($N = 94$), of which schools with publicly available mission statements were selected ($n = 53$). The source of data was extant mission statements taken from the schools' websites.

4.3. Data analysis

The content analysis technique was used in this study. Qualitative content analysis is probably the most prevalent approach to the analysis of documents. Generally, it

comprises a search of underlying themes and patterns in the materials being analyzed. This implies the key role of the investigator in the construction of the meaning of and in texts (Bryman 2012, 557-559). Stemler (2001, 1) points out that content analysis has been defined as a systematic, replicable technique for compressing many words of text into fewer content categories based on explicit rules of coding. According to Gibbs (2007, 39-40), coding can be done in pre-set and/or open ways.

In this study, a hybrid approach to creating codes was used in order to avoid the dichotomy of “present” or “absent” themes in the process of coding mission statements. Thus, before beginning the coding process, a “starting list” of “a priori codes” was made based on a coding rubric for school mission statements that was developed by Stemler and colleagues. Another set of codes emerged from reading and analyzing the mission statements.

5. FINDINGS

Totally, 17 categories were developed: ten of them may be thought of in terms of educational results or “outputs” (e.g. cognitive development), while others may be seen as institutional goals or educational “inputs” (e.g. provide a safe environment).

Table 1 shows the frequency of the extracted dominant mission statement themes across the schools being studied.

Table 1. Percentage of schools including each major theme in their mission statements (n = 53).

Categories	N	Total %
Cognitive development	41	77
Civic development	35	66
Provide a safe environment	27	51
Social development	26	49
Preparation for adult life	22	41
Comprehensive development	21	40
Moral development	21	40
Integrate into local community	20	38
Emotional development	19	36
Provide high quality education	19	36
Individual approach to student/client	16	30
Physical development	15	28
Staff development	9	17
Cultural development	7	13
Spiritual development	6	11
Integrate into global community	3	6
Provide a challenging environment	2	4

Across these schools, cognitive development was the most frequently articulated theme (found in 77 percent of school mission statements), followed by civic development (66 percent) and providing a safe school environment (51 percent). The least frequently cited element was providing a challenging environment (4 percent of schools).

To sum up, mission statements highlight the broad range of objectives that the schools pursue, but they showed consensus on at least three major purposes of schooling: (1) cognitive development, (2) civic development, and (3) providing a safe school environment.

5.1. Cognitive development

The most frequently invoked theme found across all the mission statements of the schools subject to the study is the cognitive development of students. However, in the given category, there are many different elements creating a mixed picture of the ways in which schools invoke this issue in their mission statements. The analysis has shown that there are three aspects of cognitive development that schools commonly express:

- knowledge and skills;
- developing interests and passions;
- academic achievement.

The first way schools describe cognitive development in their mission statement is to speak of students' knowledge and skills. This knowledge relates to both physical and social areas. Many schools focus in their mission statement on the knowledge and skills necessary to succeed not only in further education, but also in the fast changing world. Generally, "knowledge and skills" as a mission statement subcategory can be divided into the following elements:

- 1) equip students with knowledge and skills;
- 2) support students in the process of acquiring knowledge and skills;
- 3) help students to develop communication and technological skills;
- 4) promote the development of higher-order academic skills (independent and critical thinking, open-mindedness, creativity, problem solving).

Some examples:

"We prepare our students to seek and explore knowledge, and to solve problems independently" (34);

"We strive to make sure that all our students employ the scientific method as a way of explaining the world, using logical and critical thinking" (29);

"Our purpose is to raise the children who are entrusted to us by their parents and transmitting to them reliable knowledge about the world" (17).

The second way that schools invoke cognitive development in their mission statement emphasizes the idea of developing students' interests and passions. Generally, the focus within these mission statements is on creating the opportunity for each student to discover or develop their interests and talents. For example:

“We create a friendly atmosphere to help you develop your talents” (4);

“We seek to create optimal conditions for establishing (...) an attitude of curiosity about the world and other people” (19).

The final way schools invoke a cognitive development theme in their mission statement relates to academic achievement. School mission statements describing academic achievement commonly refer to:

1) providing an education that create an opportunity for the students to be admitted to a university;

2) the focus on high academic achievement;

3) success in the matriculation examination.

For example:

“We create an inclusive and safe environment, which allows our students to develop, educate, and pursue their interests using modern methods of knowledge and skills acquisition, with the help of a highly qualified teaching staff and support from the parents, achieving spectacular results of the secondary-school leaving examination. It allows them to select a higher level education institution according to their interests and passions” (35).

5.2. Civic development

The analysis has revealed that the schools invoke civic development in two ways:

– patriotism;

– responsible, active and entrepreneurial citizens.

One way schools include a civic development theme in their mission statements is instilling patriotism into the students. This phrase is invoked frequently in mission statements. However, they very often stress that patriotism (also the so-called “modern patriotism”) should place individuals in wider communities: Europe and the world. Below are examples of language used in mission statements that focus on patriotic conduct:

“[...]increasing a sense of national identity and community; shaping the contemporary understanding of patriotism” (16);

“Shaping a sense of modern patriotism with the respect to the ancestral heritage, the success of their own nation and its contribution to the development of Europe and the whole world” (18);

“The mission of our school is education aimed at developing in young people the sense of responsibility, love to Homeland, and simultaneously, being open to the value of European and world’ s cultures” (29).

The other way schools express the importance of civic development in their mission statement relates to their focus on a nation of responsible, active and entrepreneurial citizens. This subcategory contains such elements as:

1) participation in the political and social life;

2) shaping a positive attitude to study and work;

3) being knowledgeable and informed members of society;

4) developing responsible and entrepreneurial citizens of Europe and the world, guided by values such as solidarity, democracy, freedom, justice and a sense of duty;

5) concern for the natural environment.

Below are select good examples from this subcategory:

“Our mission, thus mine and all our teachers’, is to support the aspiration that all of our graduates will be actively involved in the life of their community” (51);

“We want to educate youth who will have a good value system, and who will be responsible for the future, who will be a motivated group of people with the will to extend their knowledge and skills constantly” (9);

“The graduate should be primarily a very responsible person. Thus, we guarantee our students the right to make their own choices, while showing the possible impacts of their decisions” (22).

5.3. Providing a safe school environment

Across all the schools subject to the study, many mission statements demonstrate the importance of providing a safe school environment. In general, schools incorporate this goal in their mission statements using two approaches:

- providing a friendly and supportive environment;
- providing a secure school environment in a physical sense.

The first way that school mission statements invoke a safe environment shows how schools perceive the emotional aspect of schooling. School mission statements describing a friendly and supportive environment commonly refer to:

- 1) providing a supportive learning environment;
- 2) creating a feeling of partnership, mutual trust and help, respect, and caring;
- 3) foster an environment of tolerance, respect for human rights and dignity;
- 4) providing a positive school atmosphere;
- 5) providing pedagogical and psychological support to students;
- 6) ensuring equal opportunity for all students;
- 7) contributing to the good of the school as a whole through cultivating and

creating its tradition.

Examples of this type of school mission statement:

“The school is based on kindness and mutual respect for human dignity between all members of the school community” (37);

“The school is a community based on the principles of partnership, friendship, respect in matters of freedom of beliefs and mutual assistance” (38);

“Our mission is to provide safety and a friendly atmosphere for the students. Our school is a place where the process of education is based on the rule of partnership” (40).

The second way schools refer to a safe environment in their mission statements addresses the safety of the school community members. Below are examples of the language that school mission statements use in relation to creating a safe school environment:

- 1) ensure the physical safety of students, staff, and parents;
- 2) prevent young people from engaging in risky behaviors;
- 3) prevent addictions;
- 4) provide a secure, orderly educational setting.

For example:

[Our goals are:] “to be a safe and friendly school, to ensure order and discipline, and to fulfil our obligations reliably” (3);

“The mission of the school is also to counteract risky behaviors, to create an attitude of responsibility for oneself and others, and to ensure security of students, teachers and parents” (49);

“We prevent drug addiction, and individually help students at risk” (9).

6. DISCUSSION

The presented study examined the broad themes in general secondary school mission statements. The analysis of 53 school mission statements revealed that: 1) mission statements highlight the broad range of objectives that the schools pursue; 2) some of these goals may be thought of in terms of educational results, while others may be seen as educational “inputs”; 3) schools share certain broad beliefs about the basic purposes of schooling. As shown above, most school mission statements highlighted at least three themes: the cognitive development of their students, their civic development, and providing a safe environment.

Given that schools are primarily intended to be educational institutions, the inclusion of cognitive goals in school mission statements is not surprising. Undoubtedly, a general secondary school should focus on cognitive development of its students. Allen’s study indicated that cognitive development, and in particular academic achievement, was the most common theme, with school belonging and mental health promotion themes cited by over half the schools (Allen et al. 2018, 249-274). Stemler, Bebell and Sonnabend (2011, 383-420) reached similar conclusions working on data from public high schools. They noted that cognitive development was one of the main priorities for these schools. However, the most dominant themes cited across mission statements related to civic development and emotional development. These researchers stressed that the strong emphasis on students’ civic development appeared to be a rather distinctive feature of public high schools in America, and no other school type similarly emphasized civic development as frequently as those schools.

In the presented study, civic development was also a very frequently articulated theme. The schools invoke civic development underlying the importance of patriotic attitude and developing students who are responsible and entrepreneurial citizens. Obviously, the belief that the development of citizenship should be one of the major objectives of schooling is not new. According to Stitzlein (2014), the identity of a citizen is not individual understanding, nor is it constituted only by a sense of membership. This identity is deeply social, and citizenship itself increasingly needs to be perceived as a “shared fate”. It entails an inclination to care about everyone in the community, even people who are different or who do not adhere to a single unifying ideology. Such an approach regarding the understanding of citizenship is a consequence of globalization: technology, communication, and the economy have

drawn people from around the world together in new ways, changing the meaning of national belonging and rendering traditional patriotic citizenship obsolete. From this point of view, schools, and in particular general secondary school, should provide a space that helps create bridges between people in local and global communities. Stemler, Bebell and Sonnabend (2011) have found in their research that the sampled high schools invoke civic development in four distinct ways: productive citizenship, responsible citizenship, public service, and contribution to the society. In the authors' opinion, this finding provides some empirical support for the philosophy of Adler, who argued that the development of citizenship is one of the primary purposes of a school. Interestingly, the analyzed theme did not emerge as dominant in the sample of Australian secondary school vision and mission statements (Allen et al. 2018). The researchers stated that civic engagement had become of increasing interest to the government through the inclusion of civics and citizenship education in the National Curriculum since 2013. Despite this, words directly related to citizenship are yet to be characterized strongly in the Australian school vision and mission statements (Allen et al. 2018).

Based on the obtained results, it could be concluded that numerous school mission statements focus on the importance of developing students who are able to succeed, demonstrate their academic achievement, pursue their passions and interests, and who are simultaneously able to adapt to the changing world, developing the life skills and attitudes needed to succeed in their own lives and contribute to the well-being of their communities, both local and global. These declarations are often accompanied by statements concerning the emotional dimension of schooling. For over three decades, the importance of providing a safe, friendly and orderly school environment has been emphasized by scholars and researchers in almost all countries (e.g. Preble and Gordon 2011). Many researchers have underlined the importance of developing school policies that will create foundations for school rules that can be promulgated to create a safe and nurturing school climate (e.g. Whitlock 2006).

Across the schools subject to the study, many mission statements mention the school being a safe and friendly place. In other words, the schools highlight the emotional safety and physical protection. Interestingly, according to Stemler and Bebell (2012), the theme of a safe or nurturing environment is emerging with a various degree of frequency across all public schools. The authors observed that this theme was cited in approximately half of the sampled elementary and middle school mission statements. By contrast, 22 percent of public high school mission statements emphasized the need of providing such a school setting. However, a strong focus on mental health promotion and school belonging was evident in the results of Allen's (et al. 2018) research. This study revealed that schools did indeed prioritize academic achievement and that these two themes appeared to have a strong presence in most of the sampled school mission statements.

In light of the above findings, it can be concluded that schools prioritize not only educational outputs, but also educational inputs such as the quality of school

environment or school climate. It is likely that schools see the interconnectedness between cognitive goals and goals related to the quality of the internal school setting.

However, the obtained results may be also viewed from another perspective. One may say that only three themes were found in over 50 percent of the schools subject to the study. From this point of view, it may be stated, on the one hand, that many school mission statements shared themes, but on the other, that individual school statements were rather different than similar. Stemler, Bebell and Sonnabend (2011, 412) spoke of the “specific aims” of each individual school. They stressed that “at least in many instances, schools themselves establish and interpret the purpose of schooling in terms of local and community needs, despite the increasing presence of state and federally mandated educational reforms”.

The way in which schools define their priorities depends on the broader legislation and educational policies at the national level. Obviously, there are many legal documents that profile the purpose of schooling and, consequently, determine how educational institutions orient their priorities and goals. One of the key document is the Polish Education Law Act of December 14, 2016. As stated in the Preamble: “education and upbringing serve to foster the development of young people’s sense of responsibility, love for their homeland, and respect for the Polish cultural heritage, as well as openness towards the values of European and world cultures. The school should provide every student with the conditions necessary for their development and prepare them to perform their duties as family members and citizens, based on the principles of solidarity, democracy, tolerance, justice, and freedom.” These two sentences refer to the general purposes of education and, at the same time, outline the mission of every educational institution. This is the foundation of the curriculum of general education, which constitutes a formal interpretation of the objectives and content of education at the national level. In accordance with the Basic General Curriculum for the school year 2017/2018, Polish educational institutions for young people had five main objectives: (1) the development of cognitive skills, (2) shaping health-promoting attitudes, (3) personal and social growth, (4) shaping civic attitudes, (5) ensuring a comprehensive development of each student.

My aim is not to assess the main objectives of schools as laid down in the documents referred to above. Instead, I want to outline a framework for reflection on the priorities that the schools under study have defined in their mission statements. It is worth noting, however, that even a cursory look at those mission statements from the perspective of the aforementioned legal solutions reveals the decision-makers’ focus on educational goals rather than on educational inputs. Interestingly, the description of the mission of schools as provided in the Act puts particular emphasis on students’ civic development. It is also highlighted in the core curriculum as one of the objectives of general secondary education, alongside cognitive, social, and the so-called comprehensive development of students. Civic development was also strongly emphasized in the mission statements of the schools that took part in the study. Among the fundamental purposes of schools,

decision-makers also include “providing every student with the conditions necessary for their development,” which in the core curriculum is further detailed in the provision on personalized education at school. The core curriculum also accentuates shaping students’ pro-health attitudes, which can be considered part of the process of building a safe school environment.

The obtained results show that although these priorities were echoed in mission statements across the schools, clearly there was a range of “specific” objectives that the schools pursue. One could risk the claim that schools would probably be more accountable for those purposes that they themselves define as most important.

CONCLUSIONS

This study must be considered with regard to its limitations. One limitation may be the difficulty in establishing a link between the objectives defined in the mission statement and their actual effect on the daily life of the school. The findings could be triangulated with data taken from other sources such as other schools’ documents or interviews with school stakeholders. In the future, it would be worthwhile to increase the sample size and use quantitative analysis methods. It will help to ascertain the reliability and validity of the study and obtain more generalizable results.

Despite these limitations, this study has showed mission statements as a useful and interesting source of information on how schools define their priorities. The results demonstrate that despite similarities between mission statements, schools signal their uniqueness in expressing their aspirations and publicly state which values are the most important to them. The diversity of the educational goals as well as the unique way the schools subject to the study perceive their own mission and role are also evident in the provisions of the above-mentioned highest-level documents on education, which also set out the mission of the school as an institution.

The obtained results may become a starting point for an in-depth reflection on the purpose, or purposes, of secondary education.

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THE PROCESS OF EDUCATING CHILDREN AND YOUNG PEOPLE IN THE ASSOCIATION OF CATHOLIC SCOUTING “ZAWISZA” FEDERATION OF EUROPEAN SCOUTING

Abstract

Upbringing is an indispensable element of the growing up of children and youth. In the first years of life, it is the parents who exert the greatest influence on the child, trying to show the child what is right and what is wrong. Over time, when the child grows up, parents are no longer alone in this difficult process, because they are helped by the school, the community of the Church and various associations to which children and young people can belong. This association includes the Association of Catholic Scouting “Zawisza” Federation of European Scouting. It is an association that follows a decades-old scouting tradition and is a movement based on the principles of the Roman Catholic religion.

Keywords: education, children and youth, scouting, “Zawisza” association

PROCES WYCHOWANIA DZIECI I MŁODZIEŻY W STOWARZYSZENIU HARCERSTWA KATOLICKIEGO „ZAWISZA” FEDERACJA SKAUTINGU EUROPEJSKIEGO

Abstrakt

Wychowanie jest nieodzownym elementem dorastania dzieci i młodzieży. W pierwszych latach życia to rodzice wywierają największy wpływ na dziecko, próbując wskazać mu, co jest dobre, a co złe. Z biegiem czasu, gdy dziecko dorasta, rodzice nie są już osamotnieni w tym trudnym procesie, gdyż pomaga im szkoła, wspólnota Kościoła oraz różne stowarzyszenia, do których dzieci i młodzież mogą przynależać. Do takich stowarzyszeń można zaliczyć Stowarzyszenie Harcerstwa Katolickiego „Zawisza” Federacja Skautingu Europejskiego (FSE). Jest to stowarzyszenie, które nawiązuje do tradycji skautowej liczącej ponad 100 lat i jest ruchem opartym na zasadach religii chrześcijańskiej.

Słowa kluczowe: wychowanie, dzieci i młodzież, skauting, stowarzyszenie „Zawisza”

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INTRODUCTION

The Association of Catholic Scouting “Zawisza” Federation of European Scouting was established in 1982. It is an educational movement following the decades-old tradition of European scouting and its Polish variation (“harcerstwo”) and build on the principles of the Christian religion. The Association employs the scout method participating in the great community of faith and common activity, i.e., the European Scouting (SSHKZ 2).

1. FOUNDATION OF THE FEDERATION OF EUROPEAN SCOUTING – A HISTORICAL OUTLINE

In order to gain a fuller insight into the character of the Association, it is necessary to look back at its sources. The Scout Method originates from the pedagogical intuition of an English Lieutenant General, Robert Stephenson Smith Baden-Powell. During his military service in India and South Africa, Lord Baden-Powell noticed that young soldiers, when they were encumbered with a high degree of responsibility but at the same time when they were trusted by their superiors, were capable of surprisingly positive behaviours. In 1899, Baden-Powell published a seminal book entitled *Aids to Scouting*, which was addressed to the British Army scouts. On his return to London, the general was surprised to find that his book became popular among young people not in any way associated with the army. The proposed model of upbringing rose interest among the youth who turned to him with numerous questions. Consequently, Lord R. Baden-Powell decided to devote more attention to this subject. In 1907, he gathered twenty boys of different social background on Brownsea Island and divided them into teams of seven called patrols. In each patrol, he chose one person to act as its leader. The outcome of this experience was a book entitled *Scouting for Boys* (Pilch 2003, 5). Sir Robert Baden-Powell said: “The motto of our times, both of the nation and of an individual, is as it seems: Selbst ueber alles - All down - me up” (Baden-Powell 1930, 16).

In Poland, the scouting movement owes its origin to Andrzej Małkowski, a student of the Polytechnic and University of Lviv, who one day in 1911 was late for classes of the Polish independence organization “Zarzew”. By way of punishment, he was ordered by the commander to translate *Scouting for Boys* into Polish. The translated book quickly became a bestseller, and the partitioned Poland was enriched with numerous scout troops. In 1913, representatives of Polish scouts participated in a rally of English scouts in Birmingham, presenting the flag of their homeland, which did not at that time exist on the political map of Europe. “This year they also take the [Polish] name *harcierz*, which means not only the first who undertakes the reconnaissance (scouting), but also the first to fight ([Polish] *harcownicy* i.e., skirmishers, or *harce* i.e., skirmishes before a battle). In 1918, after Poland regained its independence, the Polish Scouting and Guiding Association

(ZHP) was founded. The leading figures of Polish scouting were Fr. Kazimierz Lutosławski and Stanisław Sedlaczek, who was greatly influenced by the thoughts of Father Sevin and by the Catholic Scouting” (SHK 5).

The development of scouting was halted in 1948 by communist authorities, who began the process of ideologizing the scouting movement and subordinating it to its own assumptions (Kołodziej 2010, 9-18; Kwiek 1995, 123). During this period, the world scouting was also experiencing a crisis in the aftermath of World War II. The founders of the Federation of European Scouting aimed at renewing the fraternity among the warring nations in accordance with the adopted Christian principles. Unfortunately, many scouting organizations in the West began to depart from the main teaching of Lord Baden-Powell. In France, the wealth of Father Sevin’s thought was likewise abandoned. With the aim of returning to the origins and to the former principles, a French couple, Perig and Lizig Géraud-Keraod worked out a statute defining the essence, goals, and principles of the FSE, while Pierre-Yves Labbe and Jean-Charles de Coligny developed the movement’s pedagogy. After these changes, the Federation of European Scouting began to develop very rapidly in France and Italy. The activities and development of the FSE became easily recognizable. In 1975, on the occasion of the Holy Year, Pope Paul VI for the first time publicly expressed his great appreciation for the educational work of the Guides and Scouts of Europe (*Udienze* 1975).

2. EMERGENCE OF THE CATHOLIC SCOUTING IN POLAND – A HISTORICAL OUTLINE

The events of August 1980 brought in Poland a hope for a change for the better also to young members of the scouting organisation which has been operating in Poland as an educational social movement for nearly 100 years (SHK 3). Even the martial law failed to destroy these desires and aspirations. The Catholic scouting movement first established in February 1982, was in 1989 transformed into the Association of Catholic Scouting (SHK) “Zawisza” and registered in the Provincial Court in Lublin on April 10, 1990. The “Zawisza” Association, developed its own principles, goals and method of operation (DP 1999, 9). In 1995, “Zawisza” joined the European Scouting. This act made a reference to the pre-war efforts of Polish scouting and at the same time it was the culmination of the efforts initiated by Stanisław Sedlaczek and of his vision of the Catholic Scouting based on the achievements of Father Sevin. An important event for scouts from the “Zawisza” Association was their participation in 1994, in Eurojam, a great international rally of the FSE held in Italy. On August 3, 1994, 7,500 guides and scouts were received at an audience in St. Peter’s Basilica by the Holy Father John Paul II (SHK 7).

In a word addressed to the gathered youth, John Paul II said, among others: “Dear - Guides and Scouts of Europe! I am delighted to welcome you to this Wednesday general audience. During your International Jamboree in Viterbo, you undertake reflection on the theme: *In Christ, every man is my brother*. It is in this

context, that you set on a pilgrimage to the places sanctified by the martyrdom of the apostles Peter and Paul, in order to strengthen your faith and undertake with animated zeal the mission that has been entrusted to you. Indeed, you are called to participate with the whole youthful enthusiasm in the construction of a Europe of nations where the dignity of a child loved by God would be respected in every human being and where a single community based on solidarity and brotherly love would be created. (...) The Scout Law is your ideal. It inspires you to develop the basic human values: honesty, integrity, conscientiousness in fulfilling your duties, love of nature, service to others. It consists in giving others what you get. It is through service to our neighbour that we find true happiness. The scouting pedagogy provides you with invaluable means for the formation of your personality. At your side there are superiors and adults who, by guiding you with determination and delicate patience, want to assist you in becoming better and better. (...) Dear young people, at the end of this general audience I cordially greet all of you coming here from Germany, Austria, Belgium, Canada, Spain, France, Hungary, Italy, Lithuania, Luxembourg, Poland, Portugal, Romania, Russia and Switzerland. May your hearts never cease to desire to follow in the footsteps of Christ in the Church!" (Discorso 1994; DP 1999, 52-53). Currently, the SHK "Zawisza" FSE is developing the pedagogy of European Scouting, remaining faithful to the traditions of the pre-war Polish scouting (SSHKZ).

3. CHARACTER, GOALS AND METHODS OF THE ASSOCIATION OF CATHOLIC SCOUTING "ZAWISZA" FEDERATION OF EUROPEAN SCOUTING

The Association conducts educational activities for the benefit of the general community. Those activities are focused on providing young people with means of personal development by practicing the traditional scouting method worked out by the founder of scouting, Robert Baden-Powell, and later developed by Jakub Sevin and the founders of Polish scouting. This goal is carried out based on the principles of the Roman Catholic religion and through the widest possible cooperation with young people from other European countries (SSHKZ). The Association promotes young people's development in the five following areas: "health and physical fitness, practical sense, character training, sense of service, religious life" (SHK 2).

The Association pursues its goals in particular through: "educational work in separate units for boys and girls, respecting their diverse needs and psychophysical abilities. It cooperates with parents of children and youth, conducts scouting activities throughout the year (assemblies, camps and events held in nature, activities promoting physical culture and sports) and organizes winter camps, summer camps and hiking. The Association units obtain funds for the purposes of statutory activities. It also organizes training camps and courses for the educational staff and conducts publishing and information activities. Members and participants of the Association are provided with uniforms, badges, publications, pedagogical

materials, and basic scout equipment. The Association organizes scientific sessions, exhibitions, cultural events, etc. (SHK 2).

An important educational element of the Association is the principle of "Education of the young by the young". Young people are responsible for one another by fulfilling specific tasks assigned to them in their patrol. The educational work in the Association is conducted based on the division into male and female activities with the aim of respecting the natural differences in the psychophysical development of girls and boys. Scouting has also adapted its educational method to the particular stages of a young person's development.

The first stage called *Wolf Cubs* is intended for children aged 8 to 12 and its motto is *Me and Others*. This stage draws on Rudyard Kipling's *The Jungle Book*. Boys and girls are assigned to packs of six. Each child undergoes a short trial period, after which he or she becomes a cub and makes the Cub's Promise (*Prawo wilczka*). All tasks and responsibilities assigned to children in the pack are selected and formulated in such a way to help them overcome the tendency to selfishness and develop their interest in another person. The group counsellor is the *Old Wolf*, whose task is to observe the children entrusted to his or her care and to provide them with constant assistance such as advising them on their decisions, helping them to solve problems and overcome complexes, and above all, to steer them towards God. Each child has the task of gaining stars and skills, which are the outward manifestation of their progress. The patron and special advocate of the cubs is St. Francis, from whom children learn simplicity, poverty, and joy (SHK 3).

The second stage, called *Guides and Scouts*, is dedicated to children aged 12 to 17 and its motto is *Me with Others*. At this stage, the so-called patrol system is implemented in which each person experiences life in a small group of 6-8 people, under the leadership of one young person selected from this group. Each group member is moreover assigned a specific task for which he or she is responsible. Such a method develops in young people a sense of responsibility and teaches them the skill of exercising power in line with the competences typical of their age (*Karta skautingu europejskiego*). Patrols aim at integrating young people and enabling them to establish friendships. A group of friends is meant to provide support for each other and help all its members to overcome the difficulties they encounter. Education to such attitudes takes place through outdoor games, joint trips, and camps. It is during such activities that the formation of basic human virtues and the deepening and ordering of religious life takes place. Guides and scouts are obliged to give testimony with their attitude at school - through diligent study, as well as at home and in their families. Each guide and scout is bound by the scout oath: "On my honour, with God's grace, I promise to serve God, the Church, my homeland and Christian Europe with my whole life, to help my neighbour in every need, and to obey the Scout Law" (*Przyrzeczenie harcerek*).

All patrols have their leaders responsible for each of their charges. Moreover, each patrol has its own cook, who is responsible for preparing meals and for

collecting recipes; a topographer who prepares and reads maps and has orienteering skills; a treasurer in charge of the patrol's finances; a master of ceremonies and a quartermaster (SHK 3).

The third stage, *Rangers and Rovers* is intended for young people over 17 years of age and its motto is *Me for Others*. This stage means for the eldest entering the path of following Christ. For young people, it is the time to recognize their vocation and to serve others. The rangers, i.e., scout girls and rovers, scout boys, are grouped in teams of 6-8 members. The rangers form "fires", and the rovers "clans" (*Przewodniczki*). The rangers chose St. Teresa of Lisieux as their patron, while the patron saint of the rovers is St. Ignatius of Loyola (SHK 4). Fires and clans are places where young people inspire and enrich one another. Their formation is supervised by a priest as well as by the team superior. It is also a time when young people choose their spiritual leader who will help them make the right choices (SHK 19). The formation path of the rangers and rovers is divided into two stages. The first is called the stage of the *young road*, which in the case of the rangers ends with the ritual of the yellow Good Samaritan Trail, and in the case of the rovers - with the trail trial. The second stage of *active service* consists in young people's engagement in the work for the Association. Most often, this work involves taking charge of educating a specific group of children or youth undergoing formation in the Association.

The formation that both boys and girls undergo in the Association is meant to help them implement the learned principles and ways of conduct in their adult lives. Its goal is also to enable young people to begin their adult life in a responsible manner, prepare them to adopting specific attitudes and undertaking tasks in society, as well as to teach them how to face life's adversities. However, the most important goal of the formation is to prepare young people to understand and follow God's will in their lives.

At this point, it is worth clarifying the ways in which the training of the instructors' staff is performed in the Association. Young people aged 19-25 who intend to become instructors take part in in-depth personal formation for at least one year and take part in one or two training camps. The superiors of the Association participate in trainings abroad, while younger staff members are supported by older, more experienced instructors. The staff of the Association Superiors work solely on a voluntary basis (SHK 4).

Each association also has its own rules of conduct and the law which each member of that association is bound to adhere to. The basic principles of the European Scouting are as follows: 1) Scout duties start at home. 2) The scout is faithful to his homeland and works for unity and brotherhood in Europe. 3) The Scout - a son of Christianity - is proud of his faith: he works diligently to establish the Kingdom of Christ throughout his life and the world around him (SHK 4).

The Scout Law is a constant reminder to the members of the Association who they are and how they should act: the guide/scout cares about his or her honour

to earn the trust of other people. The guide/scout is loyal to his or her country, parents, superiors, and subordinates. The guide/scout is called to serve his or her neighbour and his or her salvation. The guide/scout is everyone's friend and brother or sister to another boy and girl scout. The guide/scout is polite and courteous. The guide/scout sees the work of God in nature, respects plants and animals. The guide/scout is disciplined, he or she carries out each task conscientiously to the end. The guide/scout is the master of himself or herself, smiles and sings when in trouble. The guide/scout is thrifty and cares about the welfare of others. The guide/scout is pure in thought, speech, and deeds (*Prawo harcerza*).

4. ACTIVITY OF THE ASSOCIATION OF CATHOLIC SCOUTING "ZAWISZA" FEDERATION OF EUROPEAN SCOUTING

Each Association is characterized by a specific activity. The tasks and objectives set by the Association are assigned to individual months of the year. The first two months are the period of winter holidays and the time of when individual teams and groups set on trips to the mountains to experience unforgettable adventures and get to know each other during a variety of games and mountain hikes. February 22 is the *Day of Brotherly Thoughts*, commemorating the birthday of Lord Robert Stephenson Smith Baden-Powell. It is a worldwide celebration for all guides and scouts united in the Federation of European Scouting. Another common celebration is March 25, which is the Annunciation of the Blessed Virgin Mary. On this day, each FSE community makes a pilgrimage to its local Marian shrine where the Holy Mass is celebrated for the entire FSE. This day is the *Day of Prayer for the FSE* (SHK 20).

In May, *May's Games* are organized every two years. In the gap year, all troops and packs organize individual several-day camping trips to spend time together. July is the time of summer camps for scouts and packs of wolf cubs, who travel to various places in Poland, and sometimes also abroad. The camps last from two to three weeks and are dedicated to games, study, rest, and prayer. August, in turn, is a month reserved for hikes of clan and fire leaders from each troop. At the end of the month, there are training courses for future leaders and training hikes for the current leaders of the rangers and rovers. September is the month of the new year of work, especially of scout work. On the penultimate weekend of this month, all rangers make a pilgrimage to Żarki (*Pielgrzymka wędrowników*), while on the last weekend, rovers set off on a pilgrim trail to the Benedictine Monastery Święty Krzyż (*Pielgrzymka wędrowników*).

Since its establishment in 2001, the Association has been a co-organizer of the Papal Day held in October by the Foundation Work of the New Millennium. Members of the "Zawisza" Association attempt to familiarize the public with the thought of St. John Paul II. On this day, guides and scouts also conduct a fundraising campaign under the slogan: "Let's share the love". The funds obtained in this way

are allocated to the Foundation's scholarship fund. The last two months of the year are devoted to distributing calendars, which are a contribution to the costs of daily activities of local troops and packs (SHK 20).

The main idea that inspired the founder of the European Scouting, Lord Baden-Powell, was to build peace and brotherhood among young people worldwide. The Guides and Scouts of Europe are also present in many European countries (*Wspólnota*) and in North America - Canada. The International Union of Guides and Scouts of Europe is a federation of associations based on the same fundamental text, i.e., the FSE Statute (DP 1999, 34). They also work in the same spirit to serve the younger generation. Following this idea, the organization have developed a number of documents including, among others, the *Charter of the European Scouting*, which is to "set a common code of reference for all those who wish to found an actual and true scouting brotherhood worldwide" (DP 1999, 35). For "Scouting believes that each individual has his own immortal, personal and unique destiny, and therefore rejects any social philosophy leading to any «mass planning or collectivisation» that sacrifices the individual to society. Scouting intends to educate a man of faith, a son of the Church" (DP 1999, 35).

The FSE Association admits only children and young people or associations belonging to one of the following Churches: the Catholic Church, the Orthodox Church and the Evangelical Church. In other words, their members come from communities that profess the deity of Jesus Christ and recognize the Apostolic Creed (*Dyrektorium FSE*).

The community implements the idea of brotherhood both on the national and international level through joint camps of teams from different countries and through large international jamborees called *Eurojams* (SHK 21). These meetings teach young people openness to another person and to the world. In 2003, in Żelazko near Częstochowa, the "Zawisza" Association organized the first *Eurojam* in Poland. The international scout jamboree gathered 9,000 young people from all over Europe. Another event of an international scale was a great pilgrimage of rangers and rovers from all over Europe, *Euromoot*, held in 2007. Just as the Eurojam for guides (SSHKZ) and scouts in 2003, it was a time which provided young people of different nationalities with an opportunity to build mutual bonds. During this event, 5,000 people took part in the pilgrimage to the Sanctuary of Our Lady at Jasna Góra in Częstochowa (SHK 21).

CONCLUSION

Since 1980, the Guides and Scouts of Europe have been recognized as a non-governmental organization with an advisory status in the Council of Europe (SHK 22). This article does not exhaust the topic but provides encouragement to explore it in greater detail. At the same time, the scarcity of source texts available in standard studies in Polish should be pointed out, most of the materials are available in the virtual space of the Internet.

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THE VERY HUNGRY CATERPILLAR: STORY READING AS AN EFFECTIVE STRATEGY TOWARD ACHIEVING PROFICIENCY IN EFL IN VERY YOUNG LEARNERS*

Abstract

This article examines how the use of music, tangible objects, story-reading, hands-on activities, drama activities, and Readers Theater strategy can help very young learners to become proficient in English as a foreign language. The present study is based on an English lesson taking place in a kindergarten in Lower Austria. There were two target groups of three to six year old children, one consisting of 25 learners and one consisting of 24 learners. English as a second language was taught to them in a naturalistic way for the period of three years. The learners' language skills and communicative competence in English were assessed through three different oral tests during the lesson. The results of the tests proved that the learners had already acquired a high level of proficiency in EFL as a result of the effective teaching strategies used in their English program and were capable of acquiring new vocabulary and meanings during the current English lesson.

Keywords: English as a foreign language, very young learners, effective teaching strategies, hands-on activities, story reading, Readers Theater

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BARDZO GŁODNA GAŚIENICA: CZYTANIE OPOWIADAŃ JAKO SKUTECZNA STRATEGIA OSIĄGANIA BIEGŁOŚCI JĘZYKOWEJ U MAŁYCH DZIECI W PROCESIE NAUCZANIA JĘZYKA ANGIELSKIEGO JAKO JĘZYKA OBCEGO

Abstrakt

W tym artykule przeanalizowano, w jaki sposób korzystanie z muzyki, przedmiotów, czytania opowiadań, zajęć praktycznych, zajęć teatralnych i strategii teatru czytelników może pomóc bardzo młodym uczniom w opanowaniu języka angielskiego jako języka obcego. Niniejsze badanie opiera się na lekcji języka angielskiego odbywającej się w przedszkolu w Dolnej Austrii. Badano dwie grupy dzieci w wieku od trzech do sześciu lat, jedna składała się z 25 uczniów, a druga z 24 uczniów. Angielski jako drugi język był nauczany w sposób naturalistyczny przez okres trzech lat. Umiejętności językowe uczniów i kompetencje komunikacyjne w języku angielskim zostały ocenione podczas trzech różnych testów ustnych podczas lekcji. Wyniki testów udowodniły, że w wyniku stosowania skutecznych strategii nauczania w programie języka angielskiego, uczniowie osiągnęli wysoki poziom biegłości w nauce języka angielskiego, będąc w stanie przyswoić sobie nowe słownictwo i jego znaczenie podczas bieżącej lekcji.

Słowa kluczowe: angielski jako język obcy, nauczanie małych dzieci, skuteczne strategie nauczania, zajęcia praktyczne, czytanie opowiadań, teatr czytelników

INTRODUCTION

The ability of young learners to express themselves effectively and to increase their vocabulary depends to a large extent on confidence and self-esteem partially achieved by placing the learning in an active context (Hayes Karabowska 1984; Vacca, Vacca & Mraz, 2014). Teachers can promote academic language acquisition in English through providing hands-on, inquiry-based lessons to children who learn English as a foreign language (Lee & Buxton 2010). Use of creative movement, music, and drama within a natural language environment setting can greatly enhance learning a foreign language by very young learners (Isenberg Packer & Jalongo Renck 2014). Active learning, in a variety of forms, utilizes hands-on education and reinforces student competencies and motivation in addition to connecting with the natural sense of wonder and curiosity children experience (Armon & Morris 2008; Copple & Bredekamp 2009; Freeman et al. 2014; Hornáčková Klapicová & Reister 2019a).

Teachers may feel overwhelmed in thinking about how to incorporate a variety of instructional activities designed to support learning when working with children who learn English as a foreign language (Nabors & Edwards 2011). The focus of instruction being not only on the academic content but also on the language itself contributes to this challenge the teachers may face (Hornáčková Klapicová & Reister 2019b). Two ways to overcome this challenge are to build on what the children already know through scaffolding instruction (Turnbull et al. 2004) and to provide opportunities for the children who learn English as a foreign language to talk with one another mixing or combining the two languages (Short, Vogt & Echevarria 2011). Children must use language in order to learn language

(Coleman & Goldenberg 2010). In addition, use of visual demonstrations, explanations in simple English, and allowing children to talk with one another informally as they complete a task while the child learning English as a foreign language receives the chance to practice basic vocabulary words with his or her English-speaking “buddy” can lead to successful acquisition of English as a foreign language (Hansen-Thomas 2008; Nabors & Edwards 2011).

Understanding and mastery of content can be much richer and make a deeper impact on children when teachers provide children learning English as a foreign language with multiple ways to communicate with one another and to manipulate the learning material (Armon & Morris 2008; Hornáčková Klapicová & Reister 2019a). Teaching strategies that allowed for this interaction with the material to occur in the lesson that is the focus of this article included: use of visual aids (including costumes or clothing related to the vocabulary, such as, wings of a butterfly or a headband with small butterflies on it), reading stories aloud, discussing the events presented in the story, acting out parts of the story by incorporating role-playing in reenacting what was presented by the story or the teacher, incorporating songs, and Total Physical Response activities (Armon & Morris 2008; Pray & Monhardt 2009; Short, Vogt, & Echevarria 2011; Vacca, Vacca & Mraz 2014).

During this lesson, the learners were also able to work with a teaching strategy that was loosely based on Readers Theatre that promoted student comprehension and revision of the information presented to them through engaging them in acting out parts of the story. Readers Theatre is a teaching strategy that typically focuses on developing reading fluency. This is due to the strategy involving children in working on their oral reading skills through reading aloud scripts that are based on the children’s book or literature that is the focus of the lesson. When engaging in Readers Theatre, children are not expected to memorize the lines or act out the script but rather they are to read aloud the part or script with appropriate inflection, meaning, and facial expressions (Isenberg Packer & Jalongo Renck 2014; Prescott 2019). This teaching strategy of Readers Theatre was modified in that the teacher read aloud the script of the story in English while the children role-played the action as they comprehended the material.

Through these shared experiences within the described lesson, the children not only manipulated the academic content and practiced conversational skills with one another but they were also able to demonstrate and role-play what they learned from the story as they built relationships with one another (Nabors & Edwards 2011). This type of play in a natural way is extremely beneficial in addressing communication challenges between English speakers and speakers of other languages (Burton & Edwards 2006; Hornáčková Klapicová & Reister 2019b).

This building of relationships and establishing trust with one another leads to a classroom environment or atmosphere that is warm and inviting. Teachers who incorporate naturalistic teaching strategies geared toward young learners results

in being a pleasant space for learners and one that is enjoyable and relaxed, allows for the learners to feel safe, and enables learners to take risks in trying new things, such as role-playing what is read aloud in a story through a modified form of readers theatre. This sort of setting enhances the children's potential to acquire English in a natural, spontaneous, and stimulating manner while also hopefully decreasing any anxiety from the learning process on the part of the children (Hornáčková Klapicová, 2018; Hornáčková Klapicová & Reister 2019a). Another teaching strategy to incorporate in the classroom when teaching young children English as a foreign language is through the use of tangible items.

The present paper highlights some of the teaching techniques which were used during an English lesson in kindergarten with the aim to help children acquire the second language in a naturalistic and motivating way. The contextual background and settings in which the second language was acquired will be provided, so that readers may envision how they will carry out the strategies in their own practice with a focus on implementing a modified form of the Readers Theatre teaching strategy.

1. AIMS OF RESEARCH AND METHODOLOGY

The present paper is one of the outcomes of a longitudinal project carried out in a kindergarten in Lower Austria whose primary aim was to verify whether young learners between three and six years old are capable of acquiring English as a foreign language in a natural way, and achieve a certain degree of bilinguality (German-English) through their English lessons. Instruction took place once a week during the school year for the period of 45 minutes. There were two groups of learners, each consisted of 25 learners, who were three to six years old. The strategies used in the classroom were based on the communicative approach, taking into consideration the age of the learners and their potential to acquire another language naturally and with ease. Instruction was carried out by native and near-native speakers of English. The instructors made use of various techniques and highly motivating teaching strategies, which included the use of authentic language through a great number of visual aids (real objects and pictures), auditory aids, songs, rhymes, kinesthetic aids, Total Physical Response (TPR) activities, body movement activities, multi-sensory activities, hands-on inquiry instruction, stories (story reading and story-telling), role-plays, skits and drama activities, gestures, facial expressions, social and emotional aids through active interaction with individual learners, use of the Story pyramid graphic organizer teaching strategy and Readers Theater strategy, while engaging the learners in all of the above activities and strategies, providing a relaxed and friendly learning atmosphere, eliminating fear and anxiety from the foreign language learning and communicating in the foreign language. The learners were immersed in a natural speaking environment, where English was used in meaningful contexts, providing them with real-life experiences. The results showing the effectiveness of the

above mentioned teaching strategies were obtained mainly through vocabulary tests, grammar and sentence-structure tests, listening comprehension tests, pronunciation tests, tests assessing the comprehension of meaning of words and speech acts (such as greetings, apologizing, saying thank you, making a request, asking a favor, etc.). The data was collected in the form of written notes and audio and video recordings during the English lessons. The findings disclosed that the learners had acquired quite a high level of proficiency in English by the end of the school year and demonstrated a certain degree of sequential bilingualism. Since the project in teaching English in a naturalistic way lasted for three years, there were learners in each of the two groups who attended the English lessons for more than a year (two years or three years). Those learners showed a higher level of proficiency in English and often served as helpers or assistants in communication to their younger peers.

2. STRATEGY AND ITS AIMS

The Very Hungry Caterpillar modified Readers Theatre strategy consists of reading aloud the script from the story and having the children role-play or act out what was shared in the story. The modified Readers Theatre incorporates introducing vocabulary, sequencing, rhyming, addition, role playing, actions, and the modified Readers Theatre teaching strategy. Through using the Readers Theatre teaching strategy, student comprehension and recall of the information presented to the learners was promoted. This occurred through engaging the learners in acting out the parts of the story. Readers Theatre is a teaching strategy that typically focuses on developing reading fluency. This is due to the strategy involving children in working on their oral reading skills through reading aloud scripts that are based on the children's book or literature. When engaging in Readers Theatre, the children are not expected to memorize the lines or act out the script but rather they are to read aloud the part or script with appropriate inflection, meaning, and facial expressions (Isenberg Packer & Jalongo Renck 2014; Prescott 2019). Engaging in Readers Theater promotes expression on the part of the learners, fosters communication with one another, and enhances social and pragmatic skills. This teaching strategy of Readers Theatre was modified in that the teacher read aloud the script of the story in English while the children role-played the action as they demonstrated comprehended the material.

The lesson began with the teacher introducing to the children the vocabulary and story of *The Very Hungry Caterpillar*. There was one teacher of English who presented the lesson to the Kindergarteners. The vocabulary consisted of: hungry, caterpillar, egg, leaf, moon, sun, the names of the different kinds of fruits and other food that were mentioned in the story, cocoon, and butterfly.

Visual aids were used for most of the nouns presented in the story (Pictures 1-9). One student was invited to put on the costume of the butterfly's wings and a headband that had small butterflies on it. The teacher read *The Very Hungry*

Caterpillar, invited the learners to act out what was being read aloud, and provided comments on some of the passages contained in the book explaining new words in English as she read. The teacher also added additional information to enhance comprehension on the part of the learners.

Music was incorporated into the lesson through the singing of songs, such as, *Bread and butter, honey and jam, are you hungry, yes I am!* TPR activities were carried out in the lesson for the verbs from *The Very Hungry Caterpillar* for actions like fly and eat.

After presenting *The Very Hungry Caterpillar* to the learners, a discussion on food took place. Learners were asked to list what kind of food they enjoy eating and connections were made to the food that came up in the story. Reading this story allowed for review of English vocabulary for several different food items, some animals, terms from nature, numbers, and colors.

The visuals that were used for *The Very Hungry Caterpillar* lesson were toys, clothing items, and pictures to show the learners visual representations of English vocabulary and signs. The visual representations consisted of colorful pictures of the other items from the above list in the *Needed Materials* section.

The first step in the instructional sequence was to teach or review the English words for hungry, caterpillar, egg, leaf, moon, sun, the names of the different kinds of fruits and other food that were mentioned in the story, cocoon, and butterfly. The second step was to read the book, *The Very Hungry Caterpillar*, starting with the story-reading from the children's book, using repetition, and acting out in the modified Readers Theatre what happened in the story.

The lesson concluded as the Kindergarteners completed the modified Readers Theatre teaching strategy with the teacher to assess the children's understanding of the story that was presented to them.

3. THE STORY

The Very Hungry Caterpillar is a children's book written by Eric Carle in 1969. It recounts the story of a caterpillar that hatched from its egg at the beginning of the story. The caterpillar realizes how hungry he is and decides to eat apples, pears, plums, strawberries, and oranges for an entire week by the end of which he is still hungry. The caterpillar goes on to eat cake, ice cream, pickles, swiss cheese, salami, lollipops, cherry pie, sausage, a cupcake, and a slice of watermelon which fills him to the point of a stomachache. The caterpillar's stomachache disappears when he eats through a green leaf the next day and he is all better. Once the caterpillar has had his fill of food he stays inside his cocoon until he breaks through and becomes a beautiful butterfly.

4. NEEDED MATERIALS

Pictures, toys, and other tangible items including *The Very Hungry Caterpillar* book, a caterpillar (a flowerpot and a toy), a butterfly, an egg, a cocoon, house, the moon, the sun, flowers, grass, a tree, candy, ice-cream, cake, pickles, swiss cheese, salami, lollipops, cherry pie, sausage, a cupcake, a slice of watermelon, apples, pears, plums, strawberries, and oranges, leaves (Pictures 1-9).

5. PROCEDURE

5.1. Pre-reading activities

In order to introduce the main character and the plot to the learners, various visual aids (Pictures 2-8) and interactive activities were performed before the actual reading of the story took place. The learners were invited to discuss the names, shape, color, taste, size, number, etc. of the different objects used as visual aids during the lesson. Just like what the caterpillar eats in the book, the learners were asked to classify which foods are fruits, vegetables, liquids, and sweets. Learners were also asked to identify those foods which they thought were healthy and those which were not so healthy. The learners learned that the caterpillar in the story ate too fast and too much, which made his stomach hurt. They also learned that they should take time to eat slowly and choose the healthy foods more often. The following nouns, adjectives and verbs present in the story were also reviewed and practiced during the pre-reading activities: *days of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday), eat-ate, hungry, sun, moon, house, egg, cocoon, morning, feel better, big, small, fat, slow, fast, hole, push, hurt, stomach, stomachache, butterfly.*

5.2. Story reading

After the introductory activities, which helped the learners acquire and practice old and new vocabulary and meaning, the story of *The Very Hungry Caterpillar* was read to the learners. The illustrations were showed to the learners as the story was being read and different visual aids were also used to enhance listening comprehension (including costumes or clothing that could be worn that related to the vocabulary, such as, wings of a butterfly or a headband with small butterflies on it). Individual learners were invited to act out parts of the story by incorporating role-playing in reenacting what was presented by the story.

5.3. Post-reading activities

After reading the book, the teacher discussed the events that occurred in the story with the learners. The learners were then asked to complete three different listening comprehension tests. In order to provide accurate answers, the learners needed to recall information and display their knowledge and successful listening comprehension.

6. TESTING

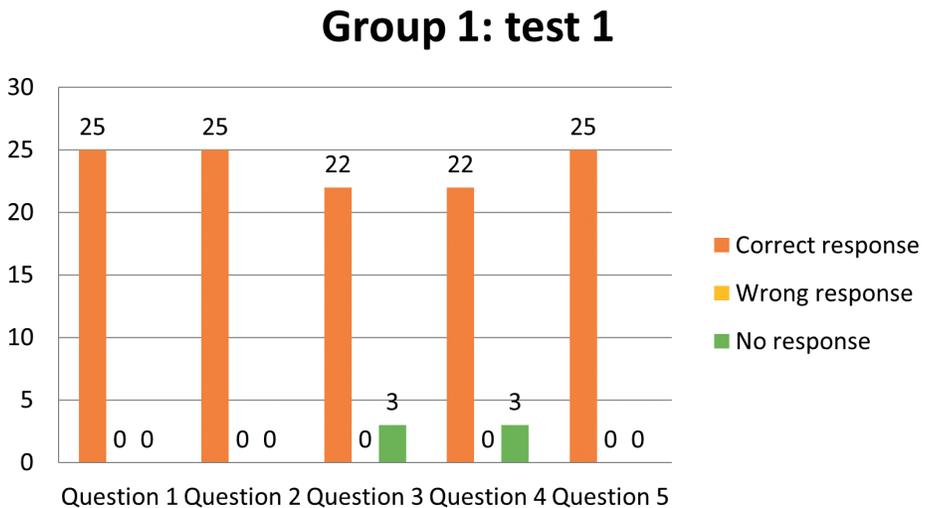
The following listening comprehension tests were applied to measure the learners' understanding of meaning of new (and old) vocabulary, listening skills, speaking skills, strategic competence, and sociolinguistic competence in English as a foreign language. The tests were given to 25 learners in Group 1 and to 24 learners in Group 2.

6.1. Test 1

In Test 1, learners were asked to answer six questions about the main character and plot.

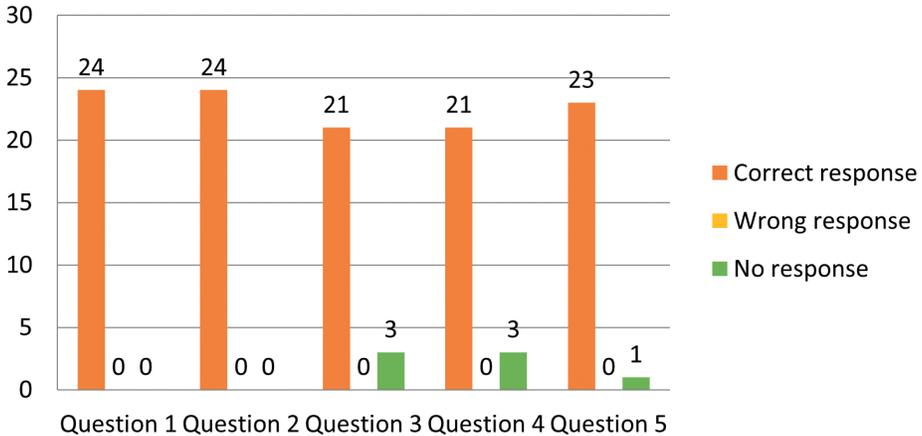
1. Who is the main character in story?
2. What did the caterpillar eat?
3. What happened to the caterpillar after he ate so much food?
4. What did the caterpillar eat that made him feel better?
5. What became of the caterpillar at the end of the story?

Graph 1



Graph 2
6.2. Test 2

Group 2: test 1

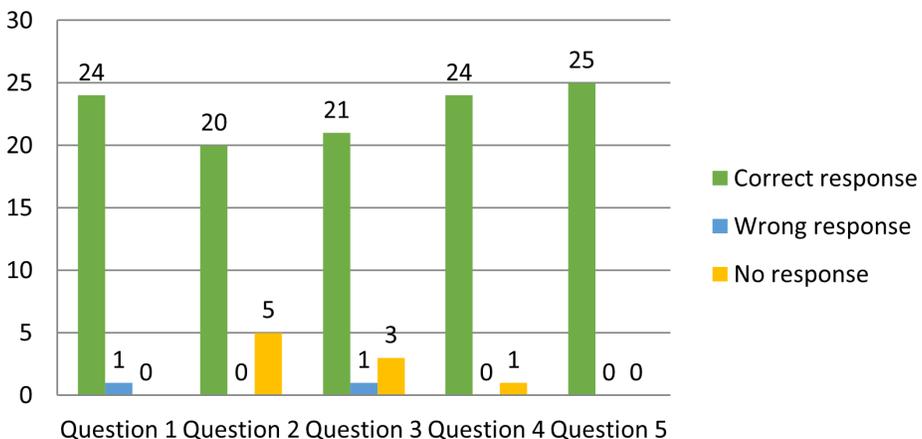


In Test 2, the learners were supposed to provide the appropriate word(s) to finish the sentences.

1. The caterpillar was very.... (hungry).
2. The Swiss cheese had... (holes) inside.
3. On Sunday, the caterpillar ate through one nice green...(leaf).
4. The caterpillar built a small...(house).
5. Then he nibbled a hole in the cocoon, pushed his way out, and he was a beautiful...(butterfly).

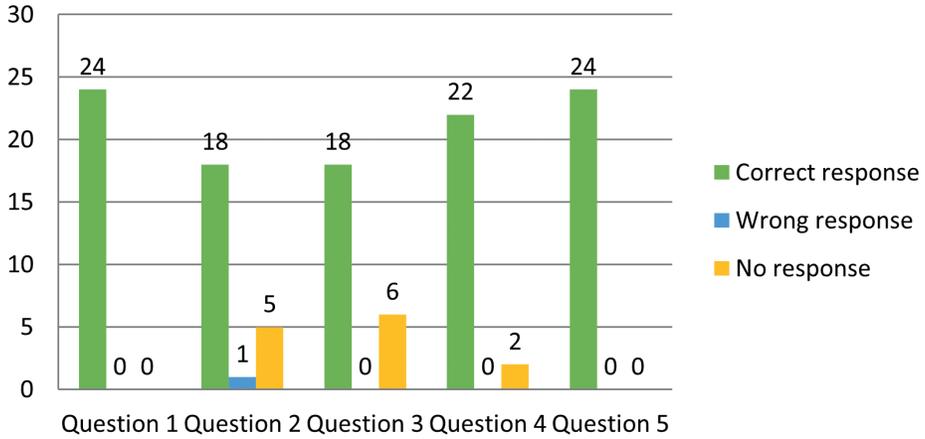
Graph 3

Group 1: test 2



Graph 4

Group 2: test 2



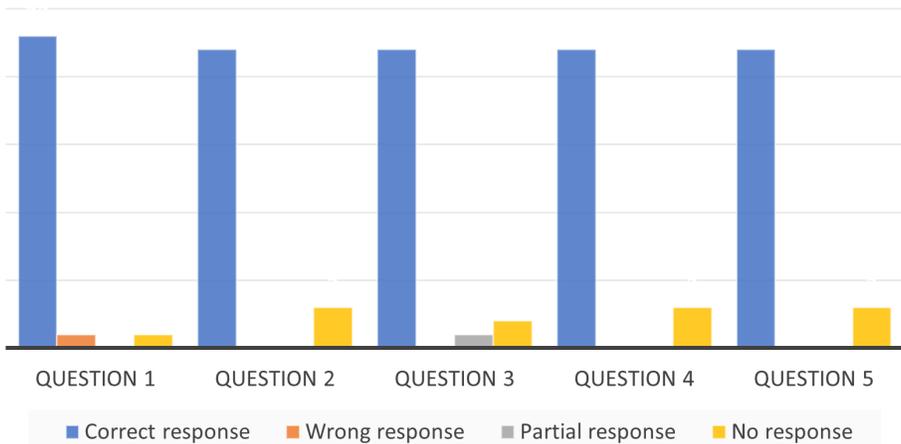
6.3. Test 3

In Test 3, the learners were asked to provide the appropriate antonym.

1. Was the caterpillar’s egg big or small? (small)
2. Is watermelon healthy or unhealthy? (healthy)
3. Is ice-cream warm or cold? (cold)
4. Is candy sweet or sour? (sweet)
5. Is cake hard or soft? (soft)

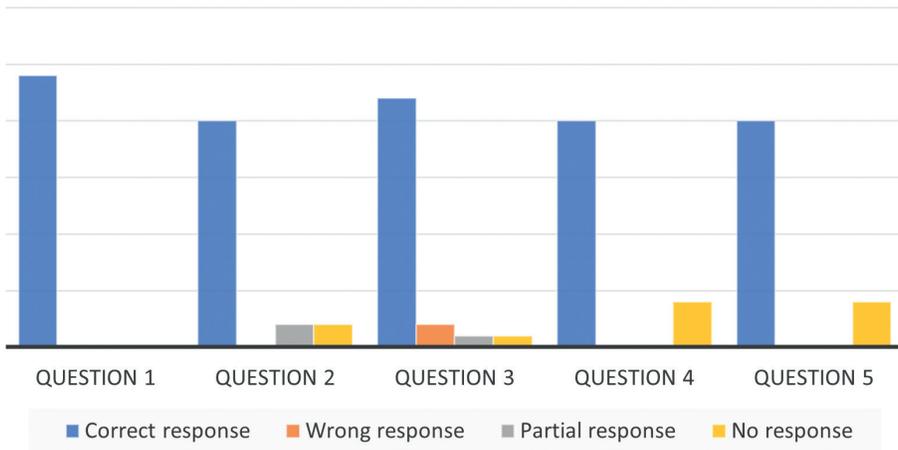
Graph 5

Group 1: test 3



Graph 6

Group 2: test 3



7. FINDINGS AND DISCUSSION

In Group 1, 25 learners out of 25 scored 100% on Questions 1, 2, and 5 in Test 1. 22 learners provided correct answers on Questions 3 and 4 in Test 2, while two learners did not provide any answers. In Group 2, 24 learners out of 24 scored 100% on Questions 1 and 2 in Test 1. 21 learners provided appropriate answers to Questions 3 and 4 on Test 1 and 23 learners provided appropriate answers to Question 5 on Test 1. Three learners provided no answers to Questions 3 and 4 on Test 1 and 1 learner provided no answer on Question 5 on Test 1.

In Group 1, 24 learners out of 25 provided appropriate answers to Question 1 on Test 2. One learner provided a wrong answer. 20 learners provided appropriate answers to Question 2 on Test 2, while 5 learners provided no answers. 21 learners provided appropriate answers to Question 3 on Test 2, while 1 learner provided an incorrect answer and 2 learners provided no answers. 24 learners provided correct answers to Question 4 on Test 2, one learner provided no response. All 25 learners scored 100% on Question 5 on Test 2.

In Group 2, 24 out of 24 learners scored 100% on Question 1 on Test 1. 18 learners provided accurate answers to Question 2 on Test 2, 1 learner provided an inaccurate answer and 5 students provided no answers. 18 learners provided accurate answers to Question 3 on Test 2, 6 learners provided no answer. 22 learners provided correct answers to Question 4, 2 learners provided no answer. All 24 learners scored 100% on Question 5 on Test 2.

In Group 1, 23 learners out of 25 provided accurate answers to Question 1 on Test 3. 22 learners provided correct answers to Question 2 on Test 3, 3 learners

provided incorrect answers. 22 learners provided accurate answers to Question 3 on Test 3, 1 learner provided an incorrect answer and 2 learners provided no answer. 22 learners provided appropriate answers to Question 4 on Test 3, 3 learners provided no answers. 22 learners provided correct answers on Question 5 on Test 3, 3 learners provided no answer.

In Group 2, 24 learners out of 24 scored 100% on Question 1 on Test 3. 20 learners provided accurate answers to Question 2 on Test 3, 2 learners provided incorrect answers and 2 learners provided no answers. 22 learners provided accurate answers to Question 3 on Test 3, 2 learners provided wrong answers, 1 learner provided a partially correct answer, and 1 learner provided no answer. 20 learners provided correct answers to Questions 4 and 5 on Test 3, 4 learners provided no answers to these questions.

In general, the results of Test 1, 2, and 3 show the high level of listening comprehension skills of the learners in both Group 1 and Group 2. The reason why some of the learners did not provide answers to some of the questions was mainly because they were the youngest members of the group (3 years old) and did not have as much exposure to English as their peers had had. Another reason for not providing the appropriate answers was that the vocabulary item tested on the test was part of new vocabulary. Wrong answers provided in some of the cases were a result of misunderstanding the question (e.g., providing the color instead of the size of the object). Partially correct answers were a result of German interference, mostly providing the appropriate answer in the German language.

The high scores on the tests are undoubtedly due to the teaching techniques used during the English lesson. The use of visual aids, TPR activities, motions, songs, story-reading, drama activities, interactive role-plays, authentic language, real-life experiences, catchy rhymes, inquiry based seeing-hearing-doing activities, hands-on activities, motivational activities, connectedness to the world, substantive conversation, implementing the modified Readers Theatre teaching strategy, use of the strategy of spiral curriculum as well as providing a relaxed and exciting learning environment are methods and principles which were implemented into the learning process. This occurred not only during the current lesson but also throughout the whole time of research with the aim to enhance learning and to provide learners with a positive experience from learning a foreign language.

CONCLUSION

This paper examined how the use of a modified Readers Theatre teaching strategy, songs, tangible items, and visuals may help very young learners who are learning a foreign language to acquire communicative skills. The current study is an outcome of an English lesson carried out in a kindergarten in Lower Austria, which incorporated hands-on inquiry-based instruction through the form of a modified Readers Theatre teaching strategy. The aim of the lesson was to teach

and practice new and old vocabulary, meaning, and structures of English as a foreign language with the use of the communicative approach. At the same time, the learners had the opportunity to improve their language skills, social skills, communicative skills, and strategic competence. Assessment was done through a number of oral tests. The results of the tests showed a very high competence of the learners in EFL. This was due to the effective teaching strategies used during the English lesson and to the learners' prior knowledge of English. The fact that the learners did not realize that they were being tested helped decrease any anxiety or stress in the learners while providing their answers to the tests.

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Appendix



Picture 1



Picture 2



Picture 3



Picture 4



Picture 5



Picture 6



Picture 7



Picture 9



Picture 9

EDITORIAL REQUIREMENTS
FOR TEXTS PUBLISHED IN “SEMINARE”

1. The editors accept materials in the form of an article, review or report related to the theological, philosophical, socio-pedagogical and historical thematic profile of the journal. “Seminare” publishes articles in Polish, English, German, Italian, Russian and French. Articles in other languages may also be exceptionally admitted. Materials for publication in the next calendar year should be sent by 31 October of the current year.
2. In order to provide reliable and accurate evaluation of texts submitted for publication in “Seminare”, each article is peer-reviewed by two independent specialists in a given field in a double-blind review process. The reviews provide clear recommendations regarding publication or rejection of a given article. On the basis of evaluation, the editors of the Editorial Board decide on the rejection, approval or sending the publication back to the author in order to make any corrections suggested by reviewers. Taking into account the limits on the number of texts adopted for a given year, the Publisher reserves the right to refuse the printout of articles notwithstanding their positive evaluation. In some cases, the editors may offer the authors a possibility of publishing their texts in the next calendar year.
3. The editors introduce time limits as regards publication of scientific reviews amounting to 3 years for Polish books and 5 years for foreign books from the date of their publication. For example, the 2019 issue of “Seminare” contains reviews of Polish publications from the years 2016-2018 and foreign language publications from 2014-2018.
4. The editors accept materials through an integrated journal management system Journal Open System 3.x available through the periodical website (<https://ojs.seminare.pl/index.php/seminare>). Articles are sent to the editors provided they contain all required publication elements, i.e.: bibliography in alphabetical order, a note about the author in Polish and English, summaries (max. 600 fonts with spaces) along with keywords in Polish and English (this also applies to materials published in German and Italian) as well as metadata about the Author and publication. The summary should also contain the article title in English.
5. The editors make the publication of materials subject to the submission by the author of a statement on the adopted ethical procedures and a statement on the transfer of copyright to the publisher. Both forms are available on the “Seminare” website: <http://seminare.pl/for-autorow/procedury-etyczne>. This is done at the stage of text submission through the Journal Open System platform.
6. The total volume of the article, attached bibliography and summaries in Polish and English, should not exceed 35 thousand fonts (including spaces).
7. Scientific articles should have a clearly separated introduction and ending and a logical internal structure (numbering format: 1, 1.1, 2., 2.1, etc.). Introduction and conclusion are not numbered.
8. Texts sent to the editors should not contain emphasis (bold, underline, spacing, etc.), with the exception of italics used for publication titles and foreign language expressions. Quotations should be written in upright font.
9. Authors should place their first and last name in the upper left corner of the first page of the article along with affiliation (e.g. CSWU, Warsaw). Priests and religious should precede their name with an appropriate abbreviation, and the religious should give the name of the religious congregation to which they belong after their surname.

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10. The note about the author should contain the following information: title/degree, name and surname, scientific affiliation and e-mail address. It should be placed in the first footnote next to the author's name.
 11. Bibliographies and footnotes are provided in Chicago style. Detailed rules are available in the information for authors on the website <http://seminare.pl/dla-autorow/zapis-bibliografii-i-przypisow>. Notes should be put in brackets. Authors may use footnotes only to expand on the main topic of reflection presented in the text.
 12. When using special fonts (e.g. logical symbols, Greek or Hebrew letters), authors are obliged to provide the editors with a file containing appropriate fonts and an article in the PDF format.
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