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THEOLOGY

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SPECIFIC IMAGE OF THE CHURCH AND EVANGELIZATION IN SAINT BEDE THE VENERABLE'S COMMENTARY ON THE APOCALYPSE

Abstract

Numerous passages of the Book of Revelations, beginning with the prologue (Rev. 1), through letters to the seven Churches (Rev. 2-3), to the vision of the Heavenly Jerusalem (Rev. 21), accentuate the image of the Church as well as the role of God's word and the issuing necessity to preach it. Those themes found their reflection in the Commentary on the Apocalypse, composed by Bede the Venerable in the first period of his erudite exegetical creative output. This article, in three subsequent stages presents the following themes: 1) the image of the Church; 2) proclamation of the word of God by the Church; 3) attributes and tasks of God's word preachers.

Keywords: evangelization, Bede the Venerable, biblical theology, word of God, ecclesiology

OSOBLIWOŚCI OBRAZU KOŚCIOŁA I EWANGELIZACJI W KOMENTARZU DO APOKALIPSY ŚW. BEDY CZCIGODNEGO

Abstrakt

W przesłaniu Księgi Apokalipsy w różnych miejscach, rozpoczynając od prologu (Ap 1), poprzez listy do siedmiu Kościołów (Ap 2-3), aż po wizję Niebieskiego Jeruzalem (Ap 21) mocno wyakcentowany został obraz Kościoła oraz rola słowa Bożego, a w związku z tym – również konieczność jego głoszenia. Tematy te znalazły swoiste odzwierciedlenie w Komentarzu do Apokalipsy, który Beda Czcigodny skompilował już w pierwszym okresie swojej pełnej erudycji twórczości egzegetycznej. Niniejszy artykuł w trzech odsłonach ujmuje tematy: 1) obraz Kościoła; 2) głoszenie przez Kościół słowa Bożego; 3) zadania i przymioty głosicieli słowa.

Słowa kluczowe: ewangelizacja, Beda Czcigodny, teologia biblijna, słowo Boże, eklezjologia

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Introduction

The final book of the Bible so richly endowed with symbolic imagery and referring to the message of both the Old and the New Testament, for centuries posed a challenge for those who wanted to analyse its content. For centuries, its visions were either referred to the history of the whole world in which it found its gradual fulfilment, or to the subsequent stages in the history of the Church. Many authors argued that the Apocalypse of John describes the events of the times in which it was composed, i.e. the turn of the 1st and 2nd century after Christ2. Without expanding further on those last interpretations, one can notice that the overall message of the Revelation starting with the prologue (Rev. 1), through letters to the seven Churches (Rev. 2-3), up to the vision of the Heavenly Jerusalem (Rev. 21) recurrently highlights the image of the Church as well as the role of God's word and, what follows, the necessity of its proclamation. Those motifs were specifically reflected in the Commentary on the Apocalypse written by Bede the Venerable in the first period of his erudite exegetical creative output. This article takes a synthetic look at the specific image of the Church and evangelization presented in Saint Bede's work.

1. Image of the Church

The basic ascertainment resounding from the pages of Bede's Commentary on the Apocalypse in reference to the Church concerns the time in which the visions and images presented in the final book of the New Testament are set. Summing up the lecture on chapters 1-3 of the Revelation, in the words of Rev. 4:1 "After this I looked, and, behold, a door was opened in heaven", Bede explains: "After describing the works of the Church and its future condition, he recapitulates from the birth of Christ, with an intention to repeat the same things in a different manner, for in this book he repeats under various figures the whole period of the Church's history" (PL 93,0142D). Thus, according to the Saint of Jarrow, the text of the Apocalypse encompasses the entire time of the Church's existence. Another question which Bede finds important is

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[2] Authors interpreting the Apocalypse of John, basically, follow the four directions defined by its time references: 1) John's Apocalypse as a prediction of the fate of the Church until the end of the world. Proponents of such an interpretation of the Apocalypse perceive in it an announcement of the seven epochs through which the Church will pass (it finds many supporters among the sects that are awaiting the end of the world today). This way of reading the Book of the Apocalypse spread in the first centuries and had its followers in the Middle Ages. 2) The Apocalypse is perceived as a reflection of the historical situation of the Church in the era of John the Apostle, and the events described in it depict the persecutions and trials of the community of believers (16th century). 3) The Apocalypse refers only to the eschatological times, hence it heralds the end of the world and contains a warning on the last days (18th century). 4) The Apocalypse is a theological vision of the world's history, hence it refers both to the situation of the Church contemporary to the author, and at the same time it refers to the "end times". The Book of the Apocalypse thus sketches a picture of the cosmic struggle between good and evil. This fight will last as long as this world exists, but it is already known who will be the Winner (Wojciechowski 2012, 75-79).

the periodization of the History of Salvation, hence, when providing his explanation of Rev. 6:1: "And I saw when the Lamb opened the first of the seven seals" he tried to convince the readers of his work that "Dominus enim patiens et resurgens finem se esse legis edocuit" (PL 93,0146C), and through the Ascension and the Pentecost, Christ strengthened the Church with the mysterious gift of grace. For Bede, the image of stamps successively opened by the Lamb, epitomize the subsequent epochs in the history of the Church: "So He then opened the book, and now He looses the seals of it. In the first seal, accordingly, he beholds the glory (*decus*) of the primitive Church, in the following three the threefold war against it, in the fifth the glory of those who triumph in this war, in the sixth the things which are to come in the time of Antichrist, and that with a brief recapitulation of former events, in the seventh the beginning of eternal rest *(quietis)"* (PL 93,0146D). What is easily noticeable is the fact that in the periodization read by Bede in the message conveyed in Saint John's Apocalypse, only the time of the first community of the Church, counted from the moment of opening the first seal and the one from the opening of the seventh seal, is the time of splendor (*decus*) and peace (*quietis*)[3]. The time following the opening of the second, third and fourth seals is the period of a fierce battle against the Church. The opening of the fifth seal heralds the triumph of the victors in this battle, and the breaking of the sixth seal marks the beginning of the Antichrist's time.

This diachronic revelation of the Church's history which reveals the truth about the time of persecutions is, according to Bede, overlapped by a multifaceted image of the Church linked to its beginnings, the present and the future. All references rest on the truth, which provide the basis of the reflection on the Church, namely, that Christ is its foundation. Commenting on Rev. 21:14, the Doctor of the Church says: "That which the gates are, the same are the foundations; that which the city is, the same are the walls. But the patriarchs may also be signified by the term 'foundations', in that they contained within themselves the names, that is, the figure of the Apostles. For by them, as foundations, although by the Apostles, as by gates, this city has been opened to the nations which shall believe. And it is to be noted, that 'the foundations', when they are spoken of in the plural, signify the doctors, or virtues, of the Church; but when in the singular, the Lord Himself, Who is the foundation of foundations (*Dominum,*

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[3] In the commentary on Rev. 21, where the vision of the new earth and new heavens and the heavenly Jerusalem is presented, Bede draws a picture of the perfect Church. Referring to the words of the book of the Apocalypse on equal dimensions of the length, width and height of the city of the saint (Rev. 21:16), Bede states: "Id est inexpugnabilem fidei, spei, charitatisque firmitatem. Potest et ipse Dominus Ecclesiam undique protegens, murus magnus intelligi, de quo et Isaias ait: Ponetur in ea murus et antemurale (Isai. XXVI) , id est, Domini protectio et intercessio sanctorum, qui iter faciunt ei docendo ad corda credentium" (PL 93,0196A). In an equally engaging way, Bede refers to the vision of the City of pure gold, depicting not only the "look" of the Church, but also its character and qualities during the Lamb's triumph: "Ecclesia auro figuratur, quae in candelabris aureis et phialis propter sapientiae cultum saepe compta describitur. Vitrum autem ad fidem veri retulit, quia quod foris videtur, hoc est et intus, et nihil simulatum est et non perspicuum in sanctis Ecclesiae. Potest et ad illud tempus referri, quo sibi invicem cogitationes in alterutrum perspicaciter declarantur" (PL 93,0197B).

qui est fundamentum fundamentorum)" (PL 93,0196C). The role of the "foundation of foundations" assigned to the Lord, is in this case used with reference to the patriarchs as a prefiguration of the apostles, as well as to the doctors of the Church[4]. In his reflections on the image of the Church, Bede makes an attempt at providing a specific solution to the symbolism of the Book of Revelation, therefore, after describing Christ as the "foundation of foundations", while explaining Rev. 21:16 "and he measured the city with the reed, twelve thousand furlongs", he refers to the perfection of the Church in fulfilling its works and in faith. In this case, the Doctor of the Church interprets number twelve appearing here, saying: "Quatuor enim principalium perfectio virtutum fide sanctae Trinitatis sublimata, quasi numero denario dignitatem componit Ecclesiae" (PL 93,0196A)[5]. In turn, when interpreting the meaning of the lion, calf, man and eagle, he contends that they sometimes refer to the Evangelists, sometimes to the whole Church. In the second case, they constitute the embodiment of the Church's virtues (Rev. 4:7): "The living creatures, again, at one time denote the Evangelists, at another the whole Church; for its fortitude is represented in the lion, its sacrificial offering in the calf, its humility in the man, and its sublimity in the flying eagle" (PL 93,0144D). From the very beginning of the Commentary, Bede derives his conviction of the Church's perfection from the close relationship between the Church and Christ the Priest. The vision of the Apocalypse, which includes a figure resembling the Son of Man who walks between the seven candlesticks symbolizing the seven churches, i.e. addressees of the Apocalypse letters (Rev. 1:13), and in particular elements of his dress and appearance, according to Bede, point to the characteristics of the person of the Son of Man and, consequently, also to the Church. And thus, "a garment down to the foot", as the saint explains: "'Poderis', which is called in Latin, 'tunica talaris', and is a sacerdotal vestment, shews the priesthood of Christ, by which He offered Himself for us, as a victim to the Father, upon the altar of the cross" (PL 93,0136A). The golden girdle with which Christ is girt, or rather the place in which this girdle embraces the figure of the Son of Man, has certain significance, since, as Bede notes, "By the 'paps' he here means the two Testaments, with which He feeds the body of the saints in communion with Himself. For the golden girdle is the choir of saints, which cleaves to

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[4] In othe passages of the Commentary, one can find the thought of the Lord living in the Church (4:2): "Ecclesiam in coelesti conversatione positam Dominus inhabitat". Hence, according to Bede, the fact that the Lord comes to help the Church and protects the Church through the intercession of the saints (4:3): "Iris, qui fit sole nubes irradiante, et post diluvium primo propitiationis indicio factus est, intercessu sanctorum quos Dominus illustrat Ecclesiam muniri designat" (PL 93,0142D).

[5] An equally interesting reflection on the Church's perfection appears at the beginning of the Commentary (1:12), where Bede interprets the vision of the seven golden candlesticks: "Pulchre hic forma describitur Ecclesiae, lumen amoris divini in pectoris casti fulgore praeferentis. Iuxta hoc quod Dominus ait: Sint lumbi vestri praecincti, et lucernae ardentes. Cuius interius exteriusque perfectionem per duas septenarii numeri partes designat, dum in ea singuli quatuor corporis qualitatibus consistentes Dominum Deum suum ex toto corde, tota anima, totaque virtute, diligunt" (PL 93,0136A). Mentioning here the four properties of the body, the Doctor of the Church means: heat, cold, dryness and humidity (Primasius. *In Apocalipsin* I,44-51).

the Lord in harmonious love, and embraces the Testaments, 'keeping', as the Apostle says, 'the unity of the Spirit in the bond of peace' (Eph. 4:3)" (PL 93,0136B). The Doctor of the Church continues his argument, in which every detail of the description of the book of the Apocalypse has its meaning[6] and leads to the most important in this context observation: "But all this appearance of the Son of Man belongs also to the Church, for He Himself was made the Christ in the same nature with it, and He gives to it a sacerdotal dignity and a judicial power, and to 'shine as the sun in the kingdom of His Father'" (PL 93,0136D) [7]. These words must be referred to the explanation of Rev. 1:6: "And hath made us kings and priests unto God and his Father in which Bede does not merely state that all Christians are a kingdom and priests, but he draws attention to the Christological foundation of the universal priesthood of the faithful: "Because the King of kings and heavenly Priest united us unto His own body by offering Himself for us, there is not one of the saints who has not spiritually the office of priesthood, in that he is a member of the eternal Priest" (PL 93,0135A). Those explanations give grounds for the conclusion about the central place of the Paschal event and its influence on the establishment of the faithful as the "kingdom and priests" (Caputa 2002, 16-17)[8].

2. Church as the Herald of the Word

From the first pages of his Commentary, Bede tries to emphasize the message of the book of the Apocalypse in relation to the power of the word of God, and thus, the necessity of proclaiming the word by the Church and by the people called for it. Venerable Bede underlines the special position and role of the Church in this regard. Interpreting one of the Apocalypse's images showing two olive trees and two candelabras (Rev. 11:4), Bede recalls the text of the prophet Zechariah (Zech. 4:2.3) and concludes

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[6] Here, also in the description of feet "as if they burned in a furnace" (1:15), Bede sees the last stage in the history of the Church, which is characterized by hard experience: "Pedes ignitos, novissimi temporis Ecclesiam dicit, quae vehementibus est examinanda et probanda pressuris. Orichalcum quippe est aes multo igne et medicamine perductum ad aureum colorem. Alia translatio, quae dicit similes orichalco Libani, significat in Iudaea, cuius Libanus mons est, Ecclesiam esse persequendam, praecipue novissime. Nam et templum saepe Libani nomen accepit, cui dicitur: Aperi, Libane, portas tuas, et comedat ignis cedros tuas" (PL 93,0136C).

[7] In another place, Bede also deduces about the unity of the nature of Christ and of the Church made up of two peoples. *In Epistolam beati Petri secundam* 1:4: "Mutat repente personam, et qui prius de se suisque dixerat: Pretiosa nobis promissa donavit, conversus extemplo ad eos quibus loquebatur: Ut per haec, inquit, efficiamini divinae consortes naturae. Quod non fortuitu, sed providenter agit. Ideo (inquit) Dominus nobis, qui natura Iudaei, qui sub lege sumus nati, qui magisterio ipsius etiam corporaliter imbuti, omnia divinae virtutis suae secreta reservavit, ideo nobis, suis videlicet discipulis, maxima et pretiosa Spiritus sui promissa donavit, ut per haec etiam vos qui ex gentibus estis, qui eum corporaliter videre nequivistis, divinae suae naturae donaret esse participes, nobis scilicet vos quae ab ipso audivimus docentibus, vos per eius mysteria consecrantibus" (PL 93,069D).

[8] This can also be noted in the words explaining Rev. 10:1: "Facie Domini clarescente, id est, ejus notitia per resurrectionis gloriam manifestata, pedes illius super montes evangelizaturi et annuntiaturi pacem (Rom X), igne sunt Spiritus sancti illustrati, et instar columnae firmati. Jacobus enim et Cephas et Joannes columnae videbantur Ecclesiae esse" (PL 93,0160CD).

that it is the Church that is "irradiated by the light of the two Testaments, and ever waits upon the commands of the Lord. (...) This is the Church with its oil, which never fails, which makes it shine for the light of the world" (PL 93,0162C)[9].

In turn, Bede, imposes on the above-quoted image of the partition of the Church's time, the imperative of proclamation to be fulfilled by the Church. Referring to Rev. 8:2: "And I saw seven angels standing before God, and given seven trumpets", the Saint of Jarrow states: "The Church, which is often presented under the number seven, is commended to the office of preaching" (PL 93,0154D), and then adds that "For although the Church preached before the coming of the Lord, it was not in every place, until it was strengthened by His Spirit" (PL 93,0155A). Thus, Bede ascertains the universal mission of the Church of all times[10]. It should be noted, however, that the idea of mission is presented here by the Doctor of the Church against the background of *Misterium verbi* and the gradual revelation of God's plan of salvation which harks back to the time of the people of the First Covenant. This is illustrated in the commentary to the drama-filled moment of the question posed on the pages of the Book of Revelation (5:2) from the mouth of a powerful angel: "Who is worthy to open the book?" Bede interprets this scene as proclamation of the law and, since it was proclaimed in particular phases of the fulfilled plan of salvation, he states that: "For 'many' prophets and wise men 'desired to see the things which the Apostles saw'; and, 'of this salvation', as Peter says, 'the prophets inquired diligently, and searched'. This is the book which is closed both to the learned and unlearned in Isaiah, but of which even there the opening is thus announced, 'In that day the deaf shall hear the words of the book', And of this Ezekiel also says, 'And I saw, and behold a hand was sent unto me, in which was the roll of a book, and He opened it before me, and it was written within and without'; when he also added that which John concealed, namely, that which was written in the book, saying, 'And there was written therein lamentations, and a dirge, and woe'. For the whole course of the Old and New Testament forewarns, that sins are to be repented of, the kingdom of heaven to be sought, and the wailings of hell to be escaped" (PL 93,0152D). The Doctor of the Church, therefore, perceives the mission of proclaiming the word of God as completion of what took place already in

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[9] In the Commentary on the Acts of the Apostles, Bede uses the image of the Church as "God's Mother". By fulfilling Christ's command, it is to "give birth" to God's spiritual children calling them to the new life and thus contribute to spreading the Kingdom "to the ends of the earth" (Acts 1:8). *Homilia V. In dominica secunda post octavas paschae*, PL 94,0156. Bede, commenting the words of Luke 13:21: "It is like leaven, which a woman took and hid in three measures of meal, till the whole was leavened", gives yet another explanation: "Mulier quippe fermentum accepit, cum Ecclesia vim supernae dilectionis et fidei, Domino largiente, consecuta est. Abscondit hoc in farinae sata tria, donec fermentaretur totum, cum Asiae, Europae, et Africae partibus verbum vitae ministravit, donec omnes terrarum termini regni coelestis amore flagrarent. Ad hujus mulieris membra se pertinere signabat, qui, recedentibus quibusdam a castitate fidei, tristis aiebat: 'Filioli mei, quos iterum parturio, donec formetur Christus in vobis' (Gal. 4:19)".

[10] Explaining the image of the Angel who set his right foot on the sea and the left on the land (Rev. 10:2), Bede states "Praedicatio fidei Christianae terra marique propagatur. Sed, allegorice, fortiora membra in maioribus periculis, altera in competentibus sistuntur" (PL 93,0161A).

the days of the Old Covenant, and what found its the full revelation in Jesus Christ. In this sense, the first people who heard the Good News were the Jews, which is why Bede, interpreting Chapter 7 of the Book of Revelation and referring allegorically to individual generations of Israel, sheds light on Israelites and selects them from "a great multitude, which no man could number" (Rev. 7: 9), to emphasize that generations of Israel were the ones who first herd the Gospel, and only then the Gentiles were to hear about the salvation proclaimed by it (PL 93,0152D: "*enumeratis tribubus Israel, quibus Evangelium primo praedicatum est, salvationem quoque velit commemorare gentium*"). In this sense, Bede draws a conclusion about the universal character of preaching and propagating God's word. This, as the Saint contends, issues from the essence of the Church, which is *Ecclesia peregrinans*. Hence, in a commentary to Rev. 14:6, where Bede used this term, he at the same time presented the Church's mission in the context of the whole earth and in the context of the battle with the dragon: "As he had described the doubtful and varied fight of the Church with the dragon, as she is a sojourner in the age, it remains to assign a due recompence to both the combatants, and shew what punishments await the bad, or what rewards the good. So, then, the preacher who runs hither and thither through the midst of the Church, carries with him the Gospel of the eternal kingdom (*Praedicator ergo, per mediam discurrens Ecclesiam, Evangelium regni portat aeterni*)" (PL 93,0174B)[11]. Thus, Bede places the proclamation of the Good News in the eschatological context of the "already and not yet" - so closely corresponding to the message and the argumentative tension of the whole Book of the Apocalypse.

3. Proclaimers' Tasks and Demands imposed on them

Bede the Venerable uses in his writings specific combinations of words to refer to activities related to preaching. A special emphasis is always placed on their subject, that is, the Holy Bible, hence the verb "to proclaim" can frequently be found in a combination "proclaim the word" (*verbum praedicare*) with additional terms such as "God's word" (*verbum Dei*), "word of life" (*verbum vitae*) or "word of faith" (*verbum fidei*). The activity itself is referred to with the words "proclaim Christ" (*Christum*

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[11] A similar to context of the pilgrimage and the pilgrim Church, is highlighted by Bede in a comment on Rev. 12. In the image of the Woman seeking shelter in the desert (Rev. 12:6), the Saint of Jarrow sees the Church who, living in the hope of eternal goods, goes through the desert of worldliness and is protected from the dangers of it: "Ecclesia sub spe vivens aeternorum peregrinatione praesentis eremi gaudet, accepta potestate calcandi super serpentes et scorpiones, et super omnem virtutem draconis rufi instar Israeliticae plebis, quae pane coelesti pasta in eremo, visu aenei serpentis, serpentes vicit ignitos" (PL 93,0167A). A little further, Bede ensures the recipients of the book of the Apocalypse on the help that the pilgrim Church will experience in the hour of fighting with the devil: "Coelum Ecclesiam significat, in qua Michaelem cum angelis suis contra diabolum dicit pugnare, quia secundum Dei voluntatem pro peregrinante Ecclesia orando, et adiutoria ministrando, confligit. Quem et Daniel in novissima gravissimaque pressura in auxilium dixit Ecclesiae venturum, unde ab eo putant Antichristum esse perimendum. Ita vero angeli eius esse dicuntur, quemadmodum et angeli nostri. Dominus ait: Angeli eorum semper vident faciem Patris mei (Matth. XVIII), eorum scilicet quorum cives sunt" (PL 93,0167B).

praedicare), "proclaim the word of God" (*verbum Dei adnuntiare*), "communicate the word" (*verbum ministrare*) and "evangelize" (*evangelizare*) (Martin 2010, 158-159). In the Commentary on the Apocalypse, the Saint of Jarrow speaks of explaining God's Law to listeners (PL 93,0145: *predicatio legis*), reminding that the possible lack of obedience to the Law brings about the threat of the punishment of hell, prophesied by the heralds of God's word identified by Bede with the angels of the Apocalypse (PL 93,0155D: *Poenam gehennae sanguinolentis operibus deberi, praedicatorum voce refertur*)[12]. In an unambiguous way, the father of the Church speaks of preaching on the wrath of God: "Preachers pour out the wrath of God in a twofold manner, while they either impose the punishments of the ungodly upon the ungodly themselves by judging spiritually; as Peter said to Simon, 'Thy money perish with thee'; or they manifest it to holy Church by preaching, as he also said, 'For their judgment now of a long time lingereth not, and their perdition slumbereth not' (2Peter 2:3)" (PL 93,0179B)

Elsewhere, Bede makes the Commentary readers realize that the heralds of the word play the role of a bridge linking the past and the present and, moreover, they constitute a repository of the community's knowledge of the past. Against this background, our author, referring to the words Rev 21:12: "and at the gates twelve angels, and names written thereon", expresses the conviction that the names written on the walls of New Jerusalem are *memoriam veterum patrum praedicatorum cordibus insitam* (PL 93,0196A). Earlier, we drew attention to the subsequent stages of the Church's activity, and among them, to the time of great hardships and struggles. Bede states that the task of preachers in those times is to *contra mox secuturam Antichristi perfidiam fidelium corda confirment* (PL 93,0164C)[13]. However, if their testimony is to be credible and convincing, they must meet the demands of the one who sends them to be heralds of his word, hence in reference to the words of Rev. 15:6: "having their breasts girded with golden girdles", Bede argues: "Let him who desires to preach strong things not only mortify the body, but also bind the breast with the gold of wisdom (*sed et pectus auro sapientiae stringat*). Or, at least, to bind the breasts with golden girdles, is to restrain all the motions of changeful thoughts by the bands of the love of God alone" (PL 93,0178C). This is, of course, about the pursuit of ascetic life and the mortification of the senses[14].

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[12] In another place, explaining the words Rev. 11:1: "Rise, and measure the temple of God", Bede states that *evangelica Scriptura* is the model for "measuring" the hearts and deeds of people. The task is to be fulfilled by the proclaimers of the word: "Surge dixit, non quia haec Ioannes sedibundus audiebat, sed quia hoc verbo excitantur corda singulorum evangelicam Scripturam actusque metiri. Ibi enim quantum singuli proficiant, quantumque regulae divinae concordent, inveniunt" (PL 93,0162AB).

[13] Also, referring to the words of Rev. 8:13: "And I beheld, and heard an angel flying through the midst of heaven, saying with a loud voice, Woe, woe, woe, to the inhabiters of the earth" Bede highlights the role that the Church's doctors, filled with the wisdom of God, have to play in their fight against the schemes of heretics: "Huius aquilae vox per eximiorum in Ecclesia quotidie pervolat ora doctorum, cum nequitiam haereticorum, Antichristi saevitiam, diemque iudicii, amatoribus terrae" (PL 93,0157AB).

[14] In his numerous works, Bede emphasizes the uniqueness of the calling of the Gospel proclaimers, but at the same time he does not stop at ascertaining their dignity and praising their

Due to his function performed in the Jarrow Abbey and associated with formatting young monks, Bede the Venerable does not abstain in his works from teaching the right attitudes to candidates for religious life[15]. Neither does he refrain from it on the pages of his Commentary on the Apocalypse, although it must be admitted that in comparison with other writings of his *Opera exegetica*, he does it rather sporadically. In this regard, it is worth noting that the Church Doctor conceives of the figure of master and his disciple/disciples as a kind of team, which as such is responsible for the quality of proclaiming the word through the testimony of a good life. Commenting on Rev 8:7, Bede says: "The life of the good is found in doctors and hearers. For, 'Blessed', he says, 'is he who reads, and he who hears the words of the prophecy'" (PL 93,0155D). The words opening his work and referring to Rev. 1:3, have the same meaning: "Teachers and hearers are therefore blessed, because they who keep the Word of God find that a short time of labour is followed by everlasting joys" (PL 93,0134D). And because the master-teacher is responsible for his disciples also in the era of threats posed by false teachers who want to distort the truth of God's word, hence the commentary in Rev. 9:19: "For the false teachers of the old serpent who deceived man, like those who are supported by the protection of princes, hurt more than if they persuaded by words alone. 'He sitteth', he says, 'lying in wait with the rich'" (PL 93,0160B).

Conclusion

The Commentary on the Apocalypse, similar to other exegetical works by Bede the Venerable, do not provide a systematic treatise on the theory of evangelization (Sztuk 2014, 21) or on the demands towards the proclaimers of the word of God. This is probably due to the fact that the author did not expand on some motifs of the rich imagery contained in the Book of the Apocalypse. However, despite this, Doctor Venerabilis drew on the contents of the final book of the Bible and made his rich reflection on the image of the Church in its various stages of existence and fulfilment of the evangelizing mission in the name of Christ. With an admirable insight, he made the reader aware of his thought and of

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personal qualities. It can be assumed that by directing his reflection to the young monks he wanted to develop in them the attitude of *correctio continua* of life and customs. For example, referring to the words Neh. 12:30: "And the priests and the Levites purified themselves", the Church Doctor states: "Justus omnimode ordo, ut qui populum mundare desiderant doctores ac praesules, prius ipsi mundentur; primo corpus suum castigent, et servituti subjiciant, ne forte aliis praedicantes, ipsi reprobi inveniantur" (*In Esdram et Nehemiam XXXIII, PL 91,0914*).

[15] This is evident, for example, in the Commentary on the Letter of James, which contains a warning against misusing the gift of speech and an encouragement to confirm the professed faith with deeds. While explaining the words of this letter, Bede warns against seeking the office of teacher in the community without first demonstrating the purity of one's conduct: "Quia improbis doctoribus silentium imposuerat eos que magisterii gradum tenere vetuerat quos nec vitae perfectionem nec continentiam linguae habere cernebat, consequenter ammonet ut si quis inter eos sapiens et disciplinatus vel sit vel sibi esse videatur magis sapienter ipse ac disciplinate vivendo eruditionem suam quam alios docendo demonstret" (PL 93,0029CD).

the theological truth conveyed in the text of the Apocalypse, that Christ is the Lord of history and, at the same time, the "foundation of foundations" on which the Church is built as a community of believers. Bede's reflection regarding the proclamation of the word by the Church, as well as the tasks and demands set for the heralds of the word, should be regarded as a kind of theological extension. The first of the above-mentioned topics was inscribed by Bede in the *partitio temporum* of the Church, in the "already and not yet" of the History of salvation together with the truth issuing from those indications about proclaiming the Law to the people of the First Covenant and that the Good News is to be preached to the ends of the earth until the time when "Secundum enim utrumque Testamentum iudicabitur mundus" (PL 93,0193D). The image of the Church and evangelization presented by Bede the Venerable in such an arrangement, in a simple way explains to the recipients of his work the difficult content of the Book of Revelation and turns into an ecclesiastical catechesis of an iconic character.

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CHRISTIAN MARTYRDOM NEVER EXPIRES: SOME THEOLOGICAL AND ETHICAL ASPECTS OF OBEDIENCE *USQUE AD SANGUINEM*

Abstract

Both in the past and today an act of bearing witness to faith in God through martyrdom has been a unique sign and testimony of love for Christ who himself was obedient to the Father *usque ad mortem*. It is at the same time a clear judgment against those cultures, which acknowledge *odium fidei*. In his moral encyclical *Veritatis Splendor* John Paul II points to several arguments in order to emphasize that the way of martyrdom has lost none of its relevance and significance for Christians nowadays. The Pope's claim is grounded on the fact that "faith possesses a moral content" and so it is false to separate faith (*credenda*) from moral life (*agenda*) of those who believe. Consequently, in particular circumstances Christians are called to be ready to lay their lives both for love of God and acceptance of his commandments. Through imitating their Lord *usque ad sanguinem* his disciples demonstrate and defend their human dignity received from the Creator, the holiness of God's law as well as the holiness of the Church.

Keywords: martyrdom, Christian faith, Christian ethics

CHRZEŚCIJAŃSKIE MĘCZEŃSTWO NIGDY NIE TRACI WAŻNOŚCI. KILKA TEOLOGICZNYCH I ETYCZNYCH ASPEKTÓW POSŁUSZEŃSTWA *USQUE AD SANGUINEM*

Abstrakt

Poprzez całe dzieje chrześcijaństwa męczeństwo było szczególnym znakiem wierności wierze w Boga i wyrazem posłuszeństwa na wzór samego Chrystusa. Zarazem było i jest znakiem miłości "do końca" i sprzeciwu wobec każdej kultury, która głosi *odium fidei*. Jednocześnie w nauczaniu Kościoła dostrzega sie ewolucję rozumienia tego *odium*, które coraz szerzej obejmuje również kontekst kulturowy czy społeczny. W swojej encyklice moralnej Jan Paweł II wskazuje na kilka szczególnych argumentów na rzecz aktualności i znaczenia postawy męczeństwa, które staje na straży nie tylko samej wiary, ale również życia moralnego tych, którzy wierzą. Wiara i moralność są bowiem nierozerwalne. Dlatego świadectwo męczeństwa potwierdza blask prawdy moralnej, a więc zobowiązującą wierność wymaganiom prawa moralnego wypływającym z godności osoby ludzkiej, ukazuje świętość prawa Bożego, a zarazem jawi sie jako znak świętości Kościoła.

Słowa kluczowe: męczeństwo, wiara chrześcijańska, etyka chrześcijańska

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Introduction

Two millennia of Christian history have proved that those who believed and followed Jesus Christ as their Lord and Saviour learnt to believe "God is always greater" (*Deus semper maior*). Many of them have matured in their faith to the point of offering their lives for the sake of the One they believed in. Undoubtedly various religions have known such radical ways of belief but for Christians martyrdom encompasses their witness *usque ad mortem* specifically for the sake of Christ. In whatever historical circumstances Christian men and women have lived, martyrdom "has always accompanied and continues to accompany the life of the Church even today" (John Paul II 1993, 90). It is then right to say that it has been part of Christian history and Christian life both in the early days of the Apostles and most recently when Jesus' disciples profess their faith being ready to lay down their lives.

1. Following the Example of the Crucified Lord

When the Risen Lord appeared to the Apostles in the cenacle he sent them to be his "witnesses" (Greek: sing. *martys*, pl. *martyres*; see Acts 1:8.22). Hence the initial meaning of "martyr' was a witness to Christ's life and resurrection. Later the term was reserved to those of Christ's disciples who experienced hardships and sufferings for their faith in him. Its meaning was finally modified and limited only to those who suffered death for their faithfulness to Jesus Christ (Middleton 2014, 120-121; *Martyr* 1997, 1046)[2].

In order to properly understand an act of Christian martyrdom it is necessary to look to the principle example of the Lord himself who said: "No one takes my life from me, I lay it down of my own free will" (J 10:18). It was deeply in Jesus' heart that his salvific mission meant to be one with the Father because he has come to the world not to do his own will but that of the Father who sent Him (J 6:38). In Christ's long conversation with the Samaritan woman he expressed it again when saying that it was his "food to do the will of the one who sent me" (J 4:34). Hence obedience to the Father's will played a central role in the life of the Son. It was this living relation with his Father that made Jesus "give his life as a ransom for many" (Mk 10:45). It is at the very heart of Christian faith to believe that "the sacrifice of Jesus 'for the sins of the whole world' (1 J 2:2) expresses his loving communion with the Father" and consequently the "desire to embrace his Father's plan of redeeming love inspired Jesus's whole life" (*Catechism of the Catholic Church* 1994, 606-607).

Everyone's path through life, when seen in the light of Christ's life in this world, is to express that same relation of obedience to the Father. Thus all men and

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[2] On *martyrium* of Christ himself and of those who remained faithful to him during the communist persecutions of the Church in Central-Eastern Europe see John Paul II's address to the participants of the Congress of Theologians of Central and Eastern Europe entitled *Theo-logia – Boho-słowie* delivered in Jasna Góra on 15 August 1991 (John Paul II 1991).

women who have come to believe in the Lord as the source of their lives are to find in Christ the direction and shape of their earthly existence and to be guided by his example. The disciples of the Lord Jesus are thus "invited to live in the sight of the Father"[3]. The Son's obedience toward the Father finds its many expressions in the Gospel. In a special way it is St. John that shows Jesus in whom "everything is a listening to and acceptance of the Father; all of his earthly life is an expression and continuation of what the Word does from eternity: letting himself be loved by the Father, accepting his love in an unconditional way, to the point of deciding to do nothing by himself but to do always what is pleasing to the Father. The will of the Father is the food which sustains Jesus in his work" (Congregation for Institutes of Consecrated Life and Societies of Apostolic Life 2008, 8)[4].

Christians, when following their Lord, must remember that Christ was "obedient to the point of death – even death on a cross" (Phil 2:8). Obedience may be defined as another name of Christ and similarly the same may be said about those who follow him. Being obedient to God who is love (1J 4:8) a Christian makes love his own way through life even *usque ad sanguinem* and so will become until the end "fully obedient and fulfilled (…) with him and in him"[5]. Christians believe in the truth of the Lord's words about love that finds its paramount expression in the act of laying down one's life for one's friends (J 15:13). Thus martyrdom when originated from the love for Christ and offered for brothers and sisters is considered by the Church as a *supreme testimony* of this love. Therefore every act of martyrdom is „an exceptional gift and (…) the fullest proof of love", by which a „disciple is transformed into an image of his Master by freely accepting death for the salvation of the world – as well as his conformity to Christ in the shedding of his blood" (Vatican II 1964, 42).

Consequently, Christian martyrdom is not just being ready to give life for the sake of some good cause but rather being ready to lay down one's life for God – like our Lord himself did for the Father. It is then right to claim that "at the centre of the

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[3] „Christ Jesus always did what was pleasing to the *Father*, and always lived in perfect communion with him. Likewise Christ's disciples are invited to live in the sight of the Father 'who sees in secret', in order to become 'perfect as your heavenly Father is perfect'" (*Catechism of the Catholic Church* 1994, 1693).

[4] "So Jesus said, 'When you have lifted up the Son of Man, then you will realize that I am he, and that I do nothing on my own, but I speak these things as the Father instructed me. And the one who sent me is with me; he has not left me alone, for I always do what is pleasing to him" (J 8:28-29); "Jesus said to them, 'My food is to do the will of him who sent me and to complete his work'" (J 4:34).

[5] „With an act of obedience, even if unaware of it, we came to life, accepting that good Will that has preferred our existing to non-existence. We will conclude our journey with another act of obedience that hopefully would be as much as possible conscious and free but above all an expression of abandonment to the good Father who will call us definitively to himself, into his reign of infinite light, where our seeking will have found its conclusion and our eyes will see him in a Sunday without end. Then we will be fully obedient and fulfilled, because we will be saying 'yes' forever to that Love that has made us happy with him and in him" (Congregation for Institutes of Consecrated Life and Societies of Apostolic Life 2008, 29).

experience of martyrdom is a testimony on behalf of the martyr's faith and love for Christ" (Pinckaers 2016, 4). Thus, to be precise, authentic martyrdom requires not just the fact that "the prosecutor inflicts death explicitly and uniquely because of belief in Christ"; the essential and "decisive component is rather the conscious and courageous affirmation by the Christian of the sovereignty and kingship of Christ" (Pinckaers 2016, 71). That is why in the ecclesiastical process of the recognition of a martyr it is required that the cause be clear – that the question of faith in Christ was directly involved. One lays one's life *for the sake of Christ*.

Martyrdom is possible because life for man is not an absolute value. Were it absolute, one could not give one's life for something else. God is the supreme value for the human being and so is salvation. Thus one can give one's earthly life in order to achieve God, life everlasting, salvation, life in God, Christ who is the life (J 14:6). Hence man is called to be ready to lay down his life and all he has and he is in order to achieve God himself – who is the supreme good man can achieve, and is called to achieve. Martyrs' witness to the truth originates from what characterizes man as man – it is only man that is capable of finding and choosing what should be done and not what can be done. In this the human being is open to the claims of truth and so confirms one's likeness to God (Ratzinger 2017, 637-638). A martyr's readiness to lay his life for the sake of truth makes him a true witness of conscience, in which a man is "alone with God" (Vatican II 1965, 16)[6]. Accordingly the act of martyrdom guarantees one's likeness to the Creator and one's lasting dignity.

In all its realism two basic orientations may be distinguished in martyrdom. While on one hand it is a sign of a choice that displays one's faithfulness to the Gospel, on the other hand it is an act of a "prophetic judgment against any culture which professes an *odium fidei*". As a result, three important issues are being emphasized and expressed in the act of martyrdom: "one's sense of what it means to be a human being, liberty in the face of death, and the prospect of eternal life" (Cunningham 1999, 536). Vatican II saw martyrdom within the universal call to holiness and so it belongs not only to the mystery of Christ but also to the ecclesial tradition as the history of Christianity has demonstrated. Every Christian martyr can be said as the one who – in the words of Nicholas Lash – "'performs' and 're-enacts' the Word of God by imitating the example of Christ even unto death" and thus explains the Word of God "not by reflection but by action" (Cunningham 1999, 536).

At the very heart of the Christian message and tradition lies the Gospel principle of charity that "never ends" which over the centuries has been handed down from one generation to another. Those who received it in faith became capable of laying down their lives in an often complex and demanding reality of their earthly pilgrimage to God. This act of offering oneself would apply and fulfil in all sorts of different circumstances, including those "in the field of justice and peace" which

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[6] "[Conscience] bears witness to the authority of truth in reference to the supreme Good to which the human person is drawn, and it welcomes the commandments. When he listens to his conscience, the prudent man can hear God speaking" (*Catechism of the Catholic Church* 1994, 1777).

has been "attested by the saints and by those who gave their lives for Christ our Saviour" (Benedict XVI 2009, 12). A particular example of martyrdom was found by the Church in the case of St. Maximilian Kolbe, a Polish Franciscan friar who offered to go to death of starvation for his fellow prisoner in the concentration camp in Auschwitz in 1941. In his homily for St. Maximilian's canonization John Paul II saw in that death "a clear witness borne to Christ" as well as "the witness borne in Christ to the dignity of man". Thus "Maximilian did not die but gave his life (…) for his brother" when he "offered himself up to death out of love" (John Paul II 1982). It is interesting to note how understanding of the *odium fidei*, a necessary criterion for ascertaining an act of Christian martyrdom, has developed in the doctrine of the Church in this context. While in the light of testimonies one could not see a clear indication that Maximilian was starved and finally killed with a lethal injection out of hatred of the faith, the Pope declared him martyr seeing in the Nazi ideology a systematic hatred and rejection of the sanctity of human life and thus implicit *odium fidei*[7]. Pope Benedict XVI later pointed out to the changing "cultural contexts of martyrdom and the strategies *ex parte persecutoris* that (…) stimulate different reasons, for example, of a political or social nature" (Benedict XVI 2006)[8].

2. Faith – Morality – Martyrdom

Christian faith, when taken in its entirety, encompasses both its doctrinal and moral content. Hence being a Christian cannot be reduced to believing in what has been revealed to us (*credenda*) but has to include moral consequences of the faith

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[7] Interesting remarks about understanding of *odium fidei* have been recently made by Card. Gerhard L. Müller in his short essay about Oscar Romero whom he called a "true martyr for Christ" who "proclaimed God's love and was prepared (…) to give his life for his sheep". Because some questioned the Christian nature of Romero's violent death claiming he had been killed for political reasons, Müller explained: "In martyrdom, the motivation of the perpetrator is never decisive. Even if those who murdered Romero believed they were doing so not out of *odium fidei* but for political reasons, this would be irrelevant. What matters is Romero's own intention. One can see this by looking at the death of Christ, the prototype of every martyrdom. The motives of the executioners were not what gave Christ's death on the cross its redeeming dimension. If that were the case, then the soldiers who crucified him would be the priests of the sacrifice. That is impossible. Jesus Christ is the High Priest of the New Covenant, who offered himself as the sacrifice through which we are redeemed once and for all. In an analogous sense, a Christian becomes a martyr by uniting himself to Christ through his willingness to suffer and die for the faith" (Müller 2018, 52).

[8] „The martyrs of the past and those of our time gave and give life (*effusio sanguinis*) freely and consciously in a supreme act of love, witnessing to their faithfulness to Christ, to the Gospel and to the Church. If the motive that impels them to martyrdom remains unchanged, since Christ is their source and their model, then what has changed are the cultural contexts of martyrdom and the strategies *'ex parte persecutoris'* that more and more seldom explicitly show their aversion to the Christian faith or to a form of conduct connected with the Christian virtues, but simulate different reasons, for example, of a political or social nature. It is of course necessary to find irrefutable proof of readiness for martyrdom, such as the outpouring of blood and of its acceptance by the victim. It is likewise necessary, directly or indirectly but always in a morally certain way, to ascertain the *'odium Fidei'* [hatred of the faith] of the persecutor" (Benedict XVI 2006).

that shape the life of those who came to believe in Jesus Christ as Saviour (*agenda*). Not only in the context of ecumenical dialogue the Church continues to point out to the "moral principles of the Gospel and their implications" (John Paul II 1995, 68). It is worth noting it is precisely in weakening the essential link between the Gospel and moral teaching that Catholic moral theology has repeatedly suffered fundamental crises both in the past and nowadays. What always needs to be reasserted is an integral perception of Christian faith, which is based on believing in Christ and living out one's faith in all circumstances (Pinckaers 1999, 13)[9]. Faith cannot be separated from morality because faith "possesses a moral content [and] it gives rise to and calls for a consistent life commitment" (John Paul II 1993, 89). Consequently Christian faith does not appeal just to human intellect, which is to accept some propositions. It is to embrace the whole life. In this sense Christians understand their faith as "a lived knowledge of Christ, a living remembrance of his commandments, and the truth to be lived out" (John Paul II 1993, 88).

It has been repeatedly proved in the history of the Church how essential it is to remain faithful and to bear witness to the entire truth of the faith. Not only Catholics but also other Christians have had martyrs in their communities of faith who "have preserved an attachment to Christ and to the Father so radical and absolute as to lead even to the shedding of blood" (John Paul II 1995, 83)[10]. It is an important dimension of the ecumenical commitment now so generously present among the followers of Christ. It also proves that despite the divisions among them the grace of God has not been withdrawn from anyone who shows perseverance in Christian life and thus becomes a witness to the faith in Christ. A Christian then becomes united to the crucified and risen Lord by true charity (*Catechism of the Catholic Church* 1994, 2473). It was stressed by St. Thomas Aquinas that martyrdom as an act of bearing witness *unto death* is an act of charity as well as of fortitude (Clark 2010, 146)[11].

It should be obvious to everyone that the way one lives out one's faith – which is moral life – turns into "confession". St. Paul reminds all Christians it is love that makes one's life true and authentic and allows to make life a witness just like the Lord himself did. His was the supreme witness through a *total gift of self* on the Cross when he "loved the Church and gave himself up for her" (Eph 5:25). In this context

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[9] „An essential condition for any true renewal of the teaching of moral theology is the reestablishment of a profound and sustained contact with the primary source of inspiration for Christian life and theology that is the Word and Person of Christ" (Pinckaers 1999, 13).

[10] "In a theocentric vision, we Christians already have a common *Martyrology*. This also includes the martyrs of our own century, more numerous than one might think, and it shows how, at a profound level, God preserves communion among the baptized in the supreme demand of faith, manifested in the sacrifice of life itself. The fact that one can die for the faith shows that other demands of the faith can also be met" (John Paul II 1993, 84).

[11] „Within the act of the martyr's endurance of death, then, Aquinas sees courage and charity working in concert, charity being the final motive cause that commands the act, and courage being the formal motive cause that elicits it. Hence, Aquinas concludes that 'martyrdom is an act of charity as commanding, and of fortitude as eliciting'" (Clark 2010, 146).

St. John Paul II continues to point to Christ whose witness is "the source, model and means for the witness of His disciples" (John Paul II 1993, 89). Not once the Lord would stress that it is his love and obedience to the Father that lie at the heart of his witness (offering and sacrifice) because he has come to do not his own will but that of the Father (J 5:30). Being called to follow the example of the Lord all his disciples through their love and obedience "in conformity with the radical demands of the Gospel" can be led to the "supreme witness of martyrdom" (John Paul II 1993, 89)[12].

In the third chapter of his moral encyclical John Paul II offers a particular appreciation of morality as an indispensible and compelling element of Christian truth of faith. Since it is in the "splendour of truth" that the document locates the solution to the current problems with "certain fundamental questions of the Church's moral teaching" (as the Pope puts it in the very title of the document), the Pope in the brief preamble of his encyclical reminds that it is truth that "enlightens man's intelligence and shapes his freedom". St. John calls Jesus Christ "the true light that enlightens everyone" (Jn 1:9). It is this truth of Jesus Christ, or the truth that Jesus Christ is (Jn 14:6), which enables a Christian to endure martyrdom. At the very centre of the argument lies the conviction that faith has to be understood as a personal "encounter, a dialogue, a communion of love and life between the believer and Jesus Christ". In it man acquires and accepts the Lord as a "truth to be lived out" (John Paul II 1993, 88). This truth is being heard and found in one's conscience, "the most secret core and sanctuary" (Vatican II 1965, 16), where one recognizes "truths and moral values for which one must be prepared to give up one's life" (John Paul II 1993, 94)[13].

Recalling martyred saints from the history of the Church John Paul II formulates several arguments for martyrdom that believers ought to perceive as a unique way of imitating their Lord who died on the Cross. Since faith and morality cannot be separated, the moral law and its demands Christians recognize in the faith become signs and proofs of their dignity that God has set in them. Over the centuries the Church has continued to teach that the God-given moral law contains norms that are universal and immutable. As such, they both make manifest and serve to protect the dignity and inviolability of every human person, "on whose face is reflected the splendour of God" (John Paul II 1993, 90). This is to emphasize that in an act of faithfulness to those moral norms to the *total gift of self* the Christian manifests and exalts the holiness of God's law. Every act of such an affirmation of the moral order that was given by God, being an act of martyrdom, bears "splendid witness both to the holiness of God's law and to the inviolability of the personal dignity of man, created in God's image and likeness" (John Paul II 1993, 92).

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[12] In the context of modern secularization an interesting problem does arise whether martyrdom can survive ever more common perception of the world and human life as radically secular. If God seems not to exist can one offer his life for God and for life eternal? (Smith 2008, 435-460).

[13] "In an individual's words and above all in the sacrifice of his life for a moral value, the Church sees a single testimony to that truth which, already present in creation, shines forth in its fullness on the face of Christ" (John Paul II 1993, 94).

The Church has never ceased to produce martyrs who remained faithful to God and his law. This is also true in the context of ecumenism. Christians of different traditions, though divided among themselves, can be proud of those who proved in their lives the power of grace. In following the Lord in his suffering and death their faithfulness and witness showed the permanence of communion of salvation, which is communion with Christ in heavenly glory[14]. Not only in the early centuries of Christianity but also in our times they proved to be ready to defend "moral truth even to the point of enduring martyrdom". Those holy martyrs continue to demonstrate that the "love of God entails the obligation to respect his commandments, even in the most dire of circumstances, and the refusal to betray those commandments, even for the sake of one's own life" (John Paul II 1993, 91). This formulation is an unambiguous assertion of the seriousness of moral life as part of Christian faith in God. St. John Paul II offers another proof of the importance and continual significance of martyrdom when he calls martyrdom an "exaltation of a person's perfect 'humanity' and of true 'life'" (John Paul II 1993, 92)[15]. It is so because in the act of laying down one's life man through the affirmation of God's law rejects as false any violation of the law by committing a sin, a morally evil act. Sin is always a *violation of man's 'humanity'* (as created by God in his image). In his apostolic exhortation *Reconiliatio et Paenitentia* the Pope calls sin "a suicidal act" because in it man, being a creature, rejects the Creator "the very one from whom he came and who sustains him in life" (John Paul II 1984, 15)[16].

In another argument for a better understanding of the significance of martyrdom St. John Paul II calls it an *outstanding sign of the holiness of the Church*. It shows its particular importance in modern society in the days of such a widespread *confusion about good and evil*. Martyrs, being faithful in their lives to God's holy law *usque ad sanguinem*, make the moral truth shine before all people. It is a unique and valuable witness to the splendour of moral truth and a contribution that lights up, as the Pope puts it, "every period of history by reawakening its moral sense" (John Paul II 1993, 93)[17]. When quoting Prophet Isaiah John Paul II reminds that

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[14] "While for all Christian communities the martyrs are the proof of the power of grace, they are not the only ones to bear witness to that power. Albeit in an invisible way, the communion between our Communities, even if still incomplete, is truly and solidly grounded in the full communion of the Saints – those who, at the end of a life faithful to grace, are in communion with Christ in glory. These *Saints* come from all the Churches and Ecclesial Communities which gave them entrance into the communion of salvation" (John Paul II 1995, 84).

[15] "as is attested by Saint Ignatius of Antioch addressing the Christians of Rome, the place of his own martyrdom: 'Have mercy on me, brethren: do not hold me back from living; do not wish that I die… Let me arrive at the pure light; once there *I will be truly man*. Let me imitate the passion of my God'" (John Paul II 1993, 92).

[16] "As a rupture with God, sin is an act of disobedience by a creature who rejects, at least implicitly, the very one from whom he came and who sustains him in life. It is therefore a suicidal act" (John Paul II 1984, 15).

[17] In a similar way, when speaking about the historical role of saints, Hans Urs von Balthasar argued: "The saints are a living out of the Gospel reality by which its inner depth becomes transparent in their life and their doctrine. (…) The great saints make the Gospel real in ways pertinent to the age

this *mysterium iniquitatis* has accompanied humanity through all its history: "Woe to those who call evil good and good evil, who put darkness for light and light for darkness, who put bitter for sweet and sweet for bitter" (Is 5:20).

As the history of Christianity attests, martyrdom is not a common vocation, relatively few are called to it, but it always embodies the "high point of the witness to moral truth". All Christians should remember, however, that Christ's disciples must be "daily ready to make" a "consistent witness (…) even at the cost of suffering and grave sacrifice" (John Paul II 1993, 93). In this assertion the Pope clearly enhances the notion of martyrdom to "include those public acts of witness, by which Christians stand against the countervailing forces of culture" (Cunningham 1999, 535). Every Christian should not dismiss an obligation to fidelity to the moral order in ordinary circumstances, as well as with the "grace of God invoked in prayer, to a sometimes heroic commitment" (John Paul II 1993, 93)[18], sustained by the virtue of fortitude.

Conclusion

Every Christian martyr, being a witness of Christ, whether in the first centuries of Christianity or in our own days, becomes an undeniable sign appealing to all other Christians to offer their own testimony to the truth of faith in their own life, following the Lord himself when he stood before the judges. In this sense, in the words of Servais Pinckaers, the martyrs call upon Christ's disciples to bear witness to the faith in Jesus Christ with "intelligence and patience, faithfully and proudly, relying on the grace of the Spirit and on prayer more than on our own abilities and resources, whether personal or technical. [They invite us to bear witness] through every difficulty, contradiction, temptation, and humiliation that we may encounter, so that we too may prove to be good servants of divine Providence in the present world, good seeds planted in the soil of God for future harvests" (Pinckaers 2016, 8).

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and culture in which they live" (Cunningham 1999, 531).

[18] Fortitude, being one of the four cardinal virtues, is defined as "the moral virtue that ensures firmness in difficulties and constancy in the pursuit of the good. (…) It enables one to conquer fear, even fear of death, and to face trials and persecutions. It disposes one even to renounce and sacrifice one's life in defence of a just cause" (*Catechism of the Catholic Church* 1994, 1808).

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VALUE OF IMAGES AND SYMBOLS IN THEOLOGICAL AND SPIRITUAL REFLECTION ON CHRISTIAN SPIRITUAL EXPERIENCE

Abstract

The article explains the concept of a spiritual experience in the context of a broadly understood experience. The author highlights the anthropological aspect of symbols and links them with human spiritual consciousness. The article concentrates on symbols occurring in the Bible and their use in symbolic acts performed by the prophets and by Jesus Christ. It shows the spiritual role of symbols in the Gospel of John and defines the role of symbols in spiritual experience realized in the context of prayer, liturgy and mysticism.

Keywords: spiritual experience, symbol, spiritual consciousness, spiritual function

WARTOŚĆ OBRAZÓW I SYMBOLI W TEOLOGICZNO-DUCHOWEJ REFLEKSJI NAD CHRZEŚCIJAŃSKIM DOŚWIADCZENIEM DUCHOWYM

Abstrakt

Artykuł objaśnia pojęcie doświadczenia duchowego w szeroko rozumianym doświadczeniu. Naświetla symbol w aspekcie antropologicznym i w powiązaniu ze świadomością duchową. Ukazuje symbole w Biblii i ich zastosowanie w czynnościach symbolicznych pełnionych przez proroków i przez Jezusa Chrystusa. Ukazuje rolę duchową symboli w Ewangelii według św. Jana. Następnie określa rolę symboli w realizacji doświadczenia duchowego w kontekście modlitwy, liturgii i mistyki.

Słowa kluczowe: doświadczenie duchowe, symbol, świadomość duchowa, funkcja duchowa

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Introduction

Paul Ricoeur's statement, well known not only among philosophers of culture, that "symbols give us food for thought", i.e. that they imply an act of cognition, was complemented on the grounds of theology which defined also other functions performed by symbols, such as that of "causing something" within a given cultural system in which they are defined. In other words, symbols "offer access to another mode of action" in a new community, as, for example, it is done through the sacrament of baptism which involves a symbolic act that transcends a baptized person to "a new way of being" (Labbé 2000, 578). The value of liturgical symbolism which harks back to the ability of images to use a symbol, which helps express its hidden meaning, is widely acknowledged in today's theology. Still, most theologians pay a lot of attention to the cognitive value of symbols, for example when striving to explain the "symbols of faith", however, they at the same time, give little thought to spiritual experience considered through the prism of symbolism. What is the relationship between symbols and Christian spiritual experience? Is it possible to present God and the relationship with Him through symbols? What is the function of symbols in this experience: does a symbol have only an expressive function or a deeper one, inscribed in the process of man's spiritual transformation and receiving a new identity in Christ?

1. Theology of Spiritual Life: a Spiritual Experience and the Language of Expression

The theology of spirituality being a theology of spiritual life is a discipline which, based on the principles of Revelation, studies Christian spiritual experience, describes its gradual development as well as defines its structures and principles (Bernard 1983, 68). Christian spiritual experience is the experience of the relationship with Christ based on faith, hope and love animated by the Holy Spirit. This experience has both a personal and ecclesiastical dimension, since man being in baptism reborn to a new life in Christ through the power of the Holy Spirit (2 Corinthians 5:17) is individually called to attain Christian maturity and holiness, and he follows this spiritual path together with the others in the Church, because "it has pleased God to make men holy and save them not merely as individuals, without bond or link between them, but by making them into a single people, a people which acknowledges Him in truth and serves Him in holiness" (Second Vatican Council 1965b, 9). It is in the Church that man listens to the word of God that awakens and strengthens his faith and unites him with Christ in the Eucharist, at the same time he gains an intense awareness of belonging to the community of the faithful and from there he is sent to be a witness of faith.

A spiritual experience that man shares when he responds positively to God's call to holiness is a different form of experience than: a) an empirical experience,

i.e. immediately accessible sensory perception of an object which is preliminary to its cognition, not through deeper reflection and research but through sensation (e.g., a view of the sea which evokes the feeling of wonder at its infinity). This type of experience marks the beginning of all cognition; b) an experimental experience typical of empirical sciences, namely, a provoked experience (e.g. one consisting in exposing a young plant to different conditions) and an analysis of the effects (plant growth or withering) using scientific methods and tools. Christian experience is to some extent analogous to the first and second type of experience, because it refers both to the sensory and intellectual experience and, at the same time, it is an experience of a higher degree than the two above-mentioned types, because it consists not only in experiencing an object but it also involves a living person and such a person's staying in a relationship with God (God's Persons) and with others, and thus, a personal nature of this experience, which therefore, should be considered on the level of (religious) experience identified by Jean Mouroux as *experiencielle* (neologism: being experienced) and by Wolfgang Beinert as "existential" (Ratzinger 2012, 83). Mouroux defines this third level of experience as something "grasped and created in all its structural elements and in all its principles of operation by human consciousness and through the purity of love which is giving itself" (Mouroux 1956, 20).

Mouroux, who aims at presenting experience as the basis of theology, points out three essential realities: the Church, Jesus Christ and Christian life. Expanding on the issue of Christian life, Mouroux mentions further three elements which he considers to be constitutive for a fuller clarification of Christian experience, namely, "affectiveness", "spiritual feeling" and "teleological virtues" (Mouroux 1956, 286-287, 307). He also enters into a detailed explanation of their role in this experience.

In an authentic spiritual experience, the objective should form the subjective (García 2001, 229). Man should respond to God's call with faith leading to a more mature personal relationship with Christ in the Holy Spirit.

In the light of such a concept of Christian spiritual experience and its essential elements, it seems plausible to ask about the language used to express it, including the language of symbols and images. In the first place, it appears to be the expression of a given individual's cultural environment together with its values and manifold manifestations that he shares, as well as that his intellectual and spiritual formation, etc. That language cannot be defined with more precision without taking into account the spiritual consciousness of man, which constitutes the basis of his spiritual life and manifests itself in understanding himself in faith before God and others, in the will to cooperate with the inspiration of the Holy Spirit and His grace not only in prayer, but in various circumstances of life and in emotional sensitivity to the "visitation" of this grace as well as in man's responding in manifold ways to the good experienced from God and other people.

Posing a question regarding the manners in which Christians can participate in the mystery of Christ, Charles Bernard points out three different ways of spiritual

contact determining three types of language: 1) life experience of Christ's mystery
or God's presence in the world and its expression in the language of symbols and
images pertaining to human life; 2) experience of God and His mystery available in
faith practiced in the community of the Church, associated with religious tradition
and culture and usually expressed in a more or less speculative language provided
by theology; 3) mystical experience, i.e. the experience of the "pure presence" of
God expressed in a language referring to selected images and symbols (Bernard
1978, 656). Understanding of Christ's mystery invariably takes place in a holistic
context, in complex situations, so it has an everyday life's dimension. Depending
on the experienced situation, man can unite with God and define Him figuratively
or symbolically as, for example, his "Strength", "Rock", "Fortress", or "Deliverer"
(Psalm 18:2). As will be demonstrated later, this language is even more often used
by mystics. In a vivid, intense life relationship with God, the language of symbols
and images seems to have an advantage over the conceptual language, which is
unable to render the character of this experience of God.

2. Symbol and its Usefulness in Spiritual Experience

What are symbols and what attributes of symbols can be useful in gaining
and expressing spiritual experience? There are many definitions of symbols
depending on the stance and the perspective adopted by researchers. A symbol
falls into the category of signs and, as all signs, it denotes something, points to
a certain reality beyond itself (*signum significativum*) and represents something/
someone else (*signum representativum*), it substitutes it/him. While a sign, for
example, a conventional sign created by a particular community (e.g. a road
sign) is meant to convey specific information and it exhausts its own content in
this information, a symbol is a sensorily perceptible sign, but at the same time
a specific, "non-transparent" sign (P. Ricoeur) referring to something inexpressible,
it is characterized by the "excess of meaning" (Kłoczowski 2003, 168). A religious
symbol is on the borderline between transcendence in which it somehow
participates (P. Tillich), the world of external forms and man, and it renews in man
the relationship between this visible world and the religious and spiritual reality.

In the light of Revelation, man created in the image and likeness of God
(Gen 1:26) is in a way "his offspring" (Acts 17:28) and, due to his dual, bodily
and spiritual structure he can be considered a symbol. The sense of human life
and activity is not exhausted in man himself, or in his visible reality. This sense
finds its fulfillment in his originator, his archetype. This archetype is contained in
Christ, who is the "image of God" and the "firstborn of all creation" (Colossians
1:15), in whose resemblance man was created and in whose resemblance he is to
realize himself, to find his full meaning. "The essence of Christian existence," wrote
Ratzinger, "is to accept one's existence as a relationship and to live in such a way
as to be able to enter into that unity [with God], which is the basis of all reality"

(Ratzinger 1994, 177). Symbols are inscribed in the relational anthropology and according to its assumptions it can be used in the realization of a spiritual experience.

It appears that Christian, i.e. spiritual anthropology today fails to pay due attention to the discovery that human conceptual thinking which finds its expression in conceptual language does not fully express the human spirit, which also expresses itself in images and symbols, and that those two ways of expression do not have to be contradictory. This is confirmed by the conception by Gilbert Durand, a prominent thinker and researcher of symbols, that "the original structures of symbolic imagination, manifesting themselves in mythologies, rituals, customs, in art and in the literature of various peoples and nations, have a universal character" (Rowiński 1986, 10). That thesis is substantialized by Durand in a book *Les structures antropologiques de l'Imaginaire. Introduction à l'archétypologie générale* (Durand 1960, 31).

This conception has been recognized by the above-mentioned scientist, Bernard, who claims that imagination has ontological significance, and does not merely play the role of a mediator between detailed sensory impression and the universality of a concept. This French theologian of spirituality claims that "imagination's activity originates in the total consciousness and it participates in its creative movement; by symbolizing its movement, the consciousness simultaneously expresses the ideal content and an affective reaction" (Bernard 1973, 1121)[2], for example, the "act of ascension" is symbolized by a "mountain" and, by evoking this symbol, consciousness, in whose movement imagination which produces images and symbols participates, becomes affectively engaged in life and it associates an image and symbol with the wealth of its activities. Imagination derives its dynamism from consciousness and it aims at transferring into the spatial perspective what has taken place, or what is to take place at a specific time, and what is marked by the realism of life.

Symbols - according to Bernard, who applies them to a spiritual experience - presents "a reality that exists in itself and which becomes capable of signifying another reality belonging to a higher ontological order" (Bernard 1983, 186), e.g. heaven as a symbol of God's dwelling. A given sensory form can become a carrier of not only one, but several meanings corresponding to different levels of life, e.g. when bread, which is the food of natural life, becomes the "bread of life", i.e. the food of supernatural life.

Thanks to the life's dynamism, which is the basic element of the symbolization process, human spiritual consciousness establishes a sensory contact with the world and from the perception of a detailed relationship with it, i.e. with an object perceived by the senses, it can rise to a spiritual level, e.g. when looking at the sun, a symbol of God (1 John 1:5), glowing with light, man can rise spiritually

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[2] In classical psychology, it was assumed that the power of imagination, as a sensory, organic power, has its location in the body, and more specifically, in the brain centres (Pastuszka 1961, 104).

to a temporal union with Him. With the help of a symbol (e.g. that of a father) spiritual awareness can elevate itself from the level of interpersonal relationships to unity with God (as the Father) or with the help of a symbol expressing community relations (e.g. a feast) it can rise to the ethical and spiritual level expressing the reality of salvation (the feast of eternal life) (Bernard 1983, 187). In each of these cases, spiritual consciousness ascends directly to the living God, independently of the discursive intellect and without the act of reasoning. All that ascending movement of human consciousness constitutes man's pursuit of God in faith supported by imagination and God's grace without which even temporary reunification with God is impossible. The dynamism of movement rests on the "traces" of God in creatures and the image of God in man, that is, it is based on the order of creation.

3. Value of Biblical Symbols in Judeo-Christian Experience

The issue of the symbolic dimension of a spiritual experience cannot be properly substantiated without reference to the Holy Scriptures which are "the source of pure and constant spiritual life" (Second Vatican Council 1965a, 21). The Bible abounds in images and symbols, but also in similes, metaphors, etc., which from the beginning shaped the Judeo-Christian symbolism. In the whole Bible, the very term "symbol" appears only once when it is used with the reference to the copper serpent placed by Moses on a high stake when Israelites became threatened by venomous snakes in the desert (Numbers 21:6-9). It appears as a "sign of salvation" (Wis 16:6; LXX MD 16:6 – "the symbol of salvation"), a sign announcing the crucified Savior (John 3:14-15). According to François Marty, this symbol appearing only once in the Septuagint proves that the Israelites' imagination was focused on the fulfillment of the covenant between God and Israel (Marty 1977, 1366), on the future Messiah.

A deeper understanding of the nature of symbols in the Hebrew world would require a more insightful analysis of the culture of the people of Israel, their historical experience, especially the experience of the relationship with God in different contexts as well as of the category of the covenant due to which the Israelites enjoyed their own spiritual identity, their own religious symbols (e.g. the Ark of the Covenant, Tabernacle) and due to which they experienced their relationship with the transcendence, with God, in their own, unique way, unlike other nations. For example, they did not make any images to represent God (Ex 20:4-5, Dt 5:8-9), as other nations, but they appealed to the word by which God Himself had previously spoken to them by chosen persons. Despite this key significance of the word, the Bible does not oppose images. The visible and the invisible were never confronted in religion and no attempts were made to endow the cult of Yahweh with a spiritualist character, aiming for the spiritual direct worship of the invisible God. Images are considered inadequate to express God and His message.

However, it can be argued that certain symbolic, signifying acts performed by prophets bear a degree of affinity with images. According to Wojciechowski,

they were intended to provide explicit means of communicating to people God's decisions and His commandments conveyed in the words and signs of prophets (Wojciechowski 1991, 12). For example, God instructed Ezekiel to put a cauldron on fire, pour water into it, put meat and bones of cattle into it and cook it until the cauldron began to boil and until its contents overcooked. By means of this "image", or rather by *verbum visibile*, because the image itself does not appear here, separately, but in connection with the message expressed in the word, God wants to move and even shake the imagination and conscience of those whom He addresses. In this case, the purpose is to show the days of horror and defeat awaiting Jerusalem from the hand of Nebuchadnezzar. The Old Testament contains many other similar symbolic acts (e.g. 1Kgs. 11:29-39; 1Kgs. 22:10-12; 2Kgs. 13:14-19; Jer 28).

Jesus Christ also recurrently performed symbolic acts, as for example, when He cursed the barren fig tree (Mk 11:12-14) when He washed his feet in the Upper Room (John 13:1-11), or when He blessed the children, promising them the Kingdom (Mt 19:13-15). In the context of a spiritual experience, it is worth mentioning here another act of Jesus, deeply related to a spiritual experience. The Risen Christ, appearing to the Apostles in the Upper Room, breathed on them and said: "Receive the Holy Spirit!" (John 20:22). In this case, the breath of Jesus is a symbol of giving the Holy Spirit to the disciples. Thus the physical act is followed by its spiritual effects (Wojciechowski 1991, 200-201), so that the Apostles, in the power of the Spirit of God, may fulfill the mission entrusted to them to proclaim the Gospel, forgive sins, etc. (John 20:23). In this particular case, it is a matter of establishing the sacrament of penance and reconciliation, because the visible act of Jesus is connected with the causative effect (Testa 1998, 228) performed by Jesus and instructed to the apostles and their successors to be repeated in the Church in order to give the sanctifying grace to people. The other symbolic acts mentioned above do not demonstrate the same effectiveness as the real act of God in the sacraments.

A spiritual experience is the experience of a personal relationship with God. This relationship can only be conceived of analogically based on a relationship with another person, with others. A question arises whether it is possible to distinguish in this experience of the spiritual relationship with God some categories which might help to understand and adequately express it? Saint Paul points to the attitude of Abraham as a model, a prototype of faith for Christians (Rom 4:3), claiming that the promise of salvation received by the patriarch was granted to him thanks to his faith (Romans 4:16) and that it can also be given to his "offspring". The attitude of faith adopted by the Israelite in the Old Covenant can be more precisely defined by such elements of experience as: "seeking the Lord" (Am 5:6), "thirsting" God (Psalm 63:2), "waiting for the Lord" (Psalm 27:14), wanting to "see God" (Ex 33:18-20), who sees everything (Dt 9:13), etc. This type of spiritual desires is found especially among prophets and pious Israelites who pray with psalms. Pierre Grelot refers to the above-mentioned phrases as "discreet means of symbolic speech" (Grelot 2001, 159).

Among the writings of the New Testament, it is the Gospel of John that is particularly rich in symbols endowed with a deep theological and spiritual meaning. Those include, among others: the temple as the symbol of Christ's body of (John 2:21), the living water as the symbol of the Holy Spirit (John 7:39), the healing of the man born blind and the resurrection of Lazarus as symbols of light and life from Christ (John 8:12; 11:25), the Mediator of Divine life. Jesus, through the Paschal Mystery, became the "Giver of [new] life" (Acts 3:15) given to the faithful in the "living bread" (John 6:51) received during the Eucharist. Whoever receives it with faith already shares in the everlasting life (John 3:36). Grelot reads Christ's statement: "I am the way, the truth and life" (John 14:6) as presentation in the symbolic language of Jesus' relationship to people as the mediator of their salvation (Grelot 2001, 194). The above mentioned elements of spiritual experience: "seek God" (John 5:30b), "see God" (Mk 9:2-8) can also be found in the very attitude of Jesus. The disciples, who are called to participate in it should "seek the kingdom of God" (Mt 6:33), "wait" for its fulfillment (Luke 23:51), etc. It should be emphasized that the element of "seeing" in the experience of disciples' relations with Jesus acquires a new significance after the resurrection, when, apart from relating to the perception of the external figure of Jesus or the spiritual link with the historical Jesus, but, through its being the "vision" of the Risen One, it becomes the "key to the interpretation" of the whole experience of faith (conf. Acts 4:20; Grelot 2001, 171).

4. Role of Symbols in the Realization of a Spiritual Experience

Christian spiritual experience is based first and foremost on the mystery of the redemptive incarnation of the Son of God experienced in the community of the Church and it draws from it the power of the Spirit to develop itself and obtain its full shape. This experience should be considered both in the context of prayer and sacramental life as well as on the level of mystical life, which represents a spiritual experience of a higher level, indicating in each of these cases the role of symbols in the realization of such an experience.

a) The function of Symbols in Prayer

During prayer, man establishes contact with God in Christ with the power of the Holy Spirit. Saint Teresa of Jesus, referring to the symbol of the "fortress", pointed out that the search for God should be carried out in the inner sphere of the spirit (Teresa of Jesus 1987, I, 1, 3), in the "inner man". This symbol invites man to detach himself from things which retain him in the sphere of everyday life, from all things that are useful and pleasant, and to follow the call of grace. By penetrating one's own self and meditating on the word of God with faith, the meditator is called to communion with the Word made flesh (John 1:14), with the person of Jesus Christ.

Classic meditation which involves the three powers of the soul, e.g. Ignatian meditation, contains an indication that before contemplating an evangelical scene, a person should imagine a specific place (*compositio loci*) in which it took place. This indication applies even to things that cannot be directly visualized (e.g., sin), and which Ignacy Loyola advices to present to oneself through their consequences (the state of one's own soul after sin) (Loyola 1991, 47, Introduction 1). This recommendation is not simply meant to prevent imagination from exerting its distracting influence on the spiritual powers, but to help man establish a personal relationship with Christ thanks to imagination. Such a relationship, when underpinned with love, will arouse in the meditator a desire to cling to Christ. This exercise, often practiced at the beginning of meditation and contemplation, contributes to the integration of human imagination with the higher powers of the soul in spiritual life (Bernard 1981, 352-353).

If the Word of God, which provides the basis for authentic Christian spirituality, is contemplated, for example in the *lectio divina*, it evokes faith that brings hope of participation in spiritual, eternal goods (Hebrews 11:1) and animates the love of God in the meditator's heart. It triggers in human soul a supernatural, spiritual dynamism, which is not only aimed at acquiring knowledge. Due to the fact that the will is moved by rational reflection on God, His love etc. and drawn by His grace, the meditation acquires a lively and affective character. Apart from cognitive awareness, affective awareness is also formed in prayer. It is "the [consciousness] which, in the face of what is stated by the reason, expresses more the point of view of our "I" (Alquié 1979, 14). Such a vivid subjective consciousness is not attained in result of intellectual analysis. In the case of Ignatian meditation, it is recommended that the stirrings of the will (faith, hope, love, feelings of adoration, admiration, etc.) should be allowed to control the soul during meditation and to lead it to a loving relationship with God, because they constitute the essence of prayer (Lercaro 1969, 65-66).

This kind of intense feelings for God can be better expressed with the help of symbols, as it was done by those "thirsty for God", who confessed, for example: "As the deer pants for streams of water, so my soul pants for you, my God" (Ps. 42:2). In this case a symbol mobilizes human spiritual forces and becomes a factor helping man to cling to God through the theological virtues, by supporting a holistic orientation on Him, i.e. of both sensory and spiritual authorities. A symbol makes man realize the need to detach from things that confine him at the sensory level, in a relation to people and things.

Meditation of the word of God is associated with the ability to grasp the spiritual meaning conveyed by it. This meaning was being unfolded by ancient exegesis, which differentiated between the literal and spiritual sense, as well as by medieval exegesis, which specified three aspects of the spiritual sense: allegorical, moral and anagogical. "Generally speaking, the spiritual meaning is, according to the principles of the Christian faith, the meaning expressed through biblical

texts, read under the inspiration of the Holy Spirit in the context of Christ's Paschal mystery and the new life to which this mystery gives rise" (Papal Biblical Commission 1994, II B, 2). The Scriptures find their fulfillment in Christ, and therefore, He is the real Savior and, at the same time, a symbol, the only way leading the faithful to the understanding of the full plan of God prepared in the history of the Old Covenant and realized in the "fullness of time" with the power of the Holy Spirit in the Paschal mystery. Interpretation of the spiritual meaning conveyed by various biblical symbols in relation to Christ in the Holy Spirit should be carried out within the faith of the Church, in communion with its pastors and taking into consideration its current biblical hermeneutics (Benedict XVI 2010, 29).

b) The Function of Symbols in Liturgy

Discovering the spiritual sense of the word of God allows us to participate more deeply in the liturgy of the Mass, whose structure consists of visible signs, symbols appearing in the form of objects (altar, pulpit, altar cross, candles, incense) as well as symbolic acts: gestures, rituals, and the uttered words explaining their meaning. "According to the divine pedagogy of salvation, their meaning has its roots in the work of creation and in human culture, it becomes more and more evident in the events of the Old Testament, and it fully reveals in the person and work of Jesus Christ" (Catechism of the Catholic Church 1145). As the signs of God and of the Church addressed by the priest to the liturgical assembly and to each participant of the liturgy, they express God's action and enable those participants to experience the paschal mystery of Christ in the Eucharist. They demand concentration, attention, application of the senses and imagination as well as involving the participants' spiritual powers in order to enable them to capture their symbolic meaning in the course of liturgical celebrations so that they can be introduced by the Holy Spirit into the spiritual reality and receive the sanctifying grace (Nadolski 2006, 1487). Through them, i.e. signs perceptible to the senses, "the sanctification of the man is signified […] and is effected in a way which corresponds with each of these signs; in the liturgy the whole public worship is performed by the Mystical Body of Jesus Christ, that is, by the Head and His members" (Second Vatican Council 1963, 7).

The words uttered by the celebrant *in persona Christi* and in the power of the Holy Spirit: "Take and eat, this is my Body ... Drink from it [the cup] all, because this is my blood of the covenant ..." (Mt 26:26-28), make that bread and wine cease to be mere signs and become the real and true Body and Blood of Jesus Christ. All other signs, gestures, rituals and words point to this transcendent act of God's entering into the human world and self-sacrifice of Jesus Christ for the salvation of man and the gift of new life, the fruit of the resurrected Lord. The symbol of the Eucharist is the Paschal Lamb, foreshadowed by the lamb consumed by the Israelites during the night of their liberation from the Egyptian captivity (Ex 12:1-20, Rev 5:6) and the pelican appearing in medieval iconography, feeding its chicks with its own blood.

c) The Function of Symbols in Mysticism

Images and symbols can be found even more often than in ordinary spiritual life, in descriptions of spiritual experiences. Mystics have a sense of disproportion between their experience and the means of its expression offered by the static language of closed concepts. Being aware of the impossibility of expressing the dynamism and the affective nature of their experience, they reach for symbols. Those symbols are very helpful, although still insufficient to express the whole nature of this experience, especially of its higher stages, of the end and God, because the only proportionate means of achieving unity with God is faith (John of the Cross 1986, II, 9, 1). For example, when a mystic says that God is light (1 John 1:5b), he does not mean to compare God to light on the basis of an external reference, but rather, to express his intense experience of God, the feeling of being enlightened by Him. This way of defining God does not preclude defining God in an "objective language" ("God is 'truth'"), but it complements this second term and in a way deepens its sense, because it grasps the experiential cognition and emphasizes the dynamic orientation of the mystic towards God.

Following a spiritual path requires a complete purification and transformation of consciousness in order to unite man with the will of God. Symbols, by renewing the relationship between the sensory world and spiritual reality, help in integrating the senses and drives with the aspirations of the will, which is directed towards God with love. The goal is to transform the sensory sphere so that it can interact with the aspirations of the spirit, as the psalmist confesses: "My soul yearns, even faints, for the courts of the Lord; my heart and my flesh cry out for the living God" (Ps. 84:3).

God reveals Himself more and more to those who follow the spiritual path. St. Teresa of Jesus, who used a rich symbolic language, presented Jesus Christ as a Friend, whose presence she often felt, and as a King who drew her towards the center of her soul with His grace. The center of the soul, according to *The Interior Castle*, is the "place" where God's image is present and the place where God is felt as immanent and transcendent; the immanent "Bridegroom" with whom the Saint establishes an ever closer spiritual bond and the transcendent God who is inconceivable (Tanni 1997, 157-159). The three mentioned symbols: "friend", "king" and "bridegroom" are taken here from interpersonal relationships and raised to the spiritual relationship of man with God.

Inspired by the *Song of Songs*, mystics define their deep relationship with God as "spiritual weddings" which are a special grace of God. "And he [Jesus] brought me into such a close communion with Him, and my heart was wed to His heart in a loving way, and I felt the slightest stirrings of His heart and He heard mine. The created fire of my love was joined with the ardor of His eternal love", wrote Saint Maria Faustina (Kowalska 1981, 1056).

Conclusion

To summarize this reflection on the significance of images and symbols in the theological and spiritual reflection on Christian spiritual experience, it should be noted that a symbol appears here as a tool performing several important functions:

a) First, it is a tool for expressing a spiritual experience which, being an experience of the human relationship with the living God in Christ, cannot be expressed in the language of closed concepts and dogmatic statements, but it requires images and symbols conveying certain feelings. The use of pictorial and symbolic language in the description of a spiritual experience allows to reveal the spiritual aspects of this experience and inclines one to participate in it. It conveys a certain cognition of an experimental nature. This especially refers to mystics. Images and symbols are also effective means of influencing the imagination and feelings of man and in the process of spiritual formation can lead him from sensory to spiritual things.

b) By opening man to a spiritual experience, a symbol corresponding to a typically human ability to symbolize and greater or lesser sensitivity, if it is associated with the theological life, is able to dynamize the movement of people's spiritual experiences, helping them to involve not only their spiritual but also sensory authorities which must be subordinated to the first ones. This kind of dynamic experiences supported by symbols can be experienced by people participating in church liturgy as well as in individual prayer.

c) Finally, symbols are helpful in the spiritual transformation of a person and helps such a person to achieve a coherent personality, which is possible due to the fact that, being stretched between the sensory and the spiritual, it unites those extremities of the reality. In the process of transformation, symbols help maintain the continuity between the various levels of life (biological, interpersonal, spiritual) in the acquisition of a new, more coherent personality of a "new man". The sign of this transformation is, among others, application of external senses to the perception of a spiritual experience, or acquisition of spiritual senses.

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CATHOLICS AND GENDER THEORIES: UNDERSTANDING HUMAN SEXUALITY IN THE EDUCATIONAL PROCESS

Abstract

The anthropological and ethical disputes in some conservative Catholic circles often refer to the problem of gender equality, particularly in the educational process. They lead to a confrontation between traditional communities, on the one hand, and on the other hand, open or liberal ones. In this context, the article aims to indicate (1) the anthropological and ethical foundations of the education based on the principle of gender equality, and (2) educational demands that result from it. Further, (3) these fundamentals will be scrutinised against Catholic anthropological and ethical criticism.

Keywords: Christian anthropology, gender theories, human dignity, human sexuality, Catholic educational ethics

KATOLICY I TEORIE GENDER. ROZUMIENIE LUDZKIEJ PŁCIOWOŚCI W PROCESIE WYCHOWAWCZYM

Abstrakt

Dyskusje antropologiczne i etyczne w pewnych konserwatywnych środowiskach katolickich często odnoszą się do problemu równości płciowej, zwłaszcza w procesie wychowawczym. Prowadzą one do konfrontacji pomiędzy wspólnotami tradycyjnymi i bardziej liberalnymi. W tym kontekście artykuł zmierza do wskazania (1) antropologicznych i etycznych podstaw wychowania opartego na zasadzie równości płciowej oraz (2) postulatów wychowawczych, które z nich wynikają. Następnie (3) te zasadnicze kwestie zostaną skonfrontowane z katolicką krytyką antropologiczną i etyczną.

Słowa kluczowe: antropologia chrześcijańska, teorie gender, godność ludzka, płciowość ludzka, katolicka etyka wychowawcza

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Introduction: Gendered Education and Catholicism – an Ethical-Anthropological or Ideological Dispute?

The presence of the gender issue in the language of philosophical, ethical and political disputes indicates that in a current public debate in many Western countries gender theories are not restricted to academic circles. These theories cannot be considered a purely theoretical interpretation of the rules governing social interactions but, as some already achieved results indicate, it aims to bring about social changes. It contains, therefore, elements of theoretical scientific analysis as well as political and ideological elements. Similar statements can be made with reference to Catholicism as well. A religious community is not only a group of people who share the same beliefs and perform similar rituals. An authentic religious community also aims to change the world, and social life in particular, in accordance with the doctrine it follows, and consequently, the ethics that results from it (Robbins 2014, 165). Obviously, gender theories (either as a branch of social studies or a way to interpret social life) and Catholicism (as a Christian denomination) operate on different cognitive levels. Although they cannot be considered comparable, one can notice an area for comparison and interaction as far as the transfer from their theoretical presuppositions into practical output is concerned. However, both gender theories and Catholicism are not only collections of ideas, be it social, philosophical or religious ones. They also make certain demands addressed to modern societies and in particular those institutions and people who are responsible for the process of social changes (Neuenfeldt 2015, 18-20).

The implications regarding raising children in both Catholicism and gender theories become conflicting areas. One of the consequences of anthropological presuppositions of gender theories is a very particular assessment of those institutions and environment which are responsible for children's education. As a result of the said presuppositions, the demands are directed to various educational institutions to implement changes in the educational process in order to eliminate all elements that could potentially lead to oppression, discrimination or exclusion of other people. Particular emphasis is put on these elements that impose on children strictly defined social roles, and the way of the realisation of their sexual identity, which have been repeated for generations. Catholicism, on the other hand, stemming from its doctrinal premises, with particular emphasis on anthropological assumptions and ethical guidelines, creates its own educational system. This system is based on a traditionally structured family and auxiliary institutions (such as the Church and the state). The goal of the said education is also defined in a different way (Vatican Council II 1965b).

2. Anthropological Foundations

A comprehensive formulation of the essence of the educational process comprises the reflection on its context, educational institutions and the environment, on the one hand, as well as the reflection on its goals and methods that are supposed to enable achieving the said goals, on the other hand. If one wants to try to outline the main anthropological foundations of the gender theories of education, it is important to concentrate on the changes that have occurred in the context of modern realisation of the educational process including the educational environment and institutions.

1.1. Social Context of Education

The process of education has a social dimension with all its positive and negative consequences. Education always means socialisation, but it also aims to adjust every individual that is being educated to the framework established by the society (Apple 2013, 151-165; Pollard et al. 1991, 293-294). The context of education enables men and women to enter a complicated network of social interactions, gives them social acceptance and the right to participate in the life of society. However, it inevitably shapes an individual according to social expectations that include prevalent patterns of behaviour, attitudes, and beliefs. The result of this process is the ability of both men and women to function in society. The question remains whether they can maintain their autonomy while being subject to the strong outside influence (Straus 1991, 370-371). In a society where the traditional structure of interpersonal relations is strong and unquestioned, the issue about the destructive or perhaps restrictive aspect of the educational processes does not exist. The crisis of society as a sustainable community of values and the source of conduct and beliefs results in a greater importance attributed to an individual. Consequently, it seems impossible to avoid the problem of 'distorting' men and women, who are subject to the said education by adjusting their performance to the entire set of currently socially acceptable norms (Loots and Walker 2015).

The crisis of modern societies, in particular, the Western ones, leads to loosening social ties and challenging the normative and ethical role of society as well as its structures and institutions. Consequently, a major change in attitude towards the predominant patterns of behaviour is observed within the community of young people who are under a variety of educational influences. It refers to traditional determinants of adulthood, that is, the ability to function independently in a society and shape one's own life. A particularly important change seems to be the change of understanding one's fulfilment. It does not necessarily include the adoption of a traditional social role assigned to men and women according to their gender, ethnic and social background, individual physical features or family traditions (Bass 2015, 363-366; Coakley 2009, 58). In the anthropological dimension, these changes, which appreciate self-defining of men and women, and

relativize imposed models of life realisation seem to express the promotion of human dignity. They also seem to express the value of every man and woman as an individual and unique person, who cannot be viewed only as a piece of a social machine.

1.2. Transformation of the Family as an Educational Environment

The family remains an important educational environment, which is also the case in the Western socio-cultural context. Nevertheless, one cannot deny the changes it goes through, which are sometimes described as the erosion of traditional family patterns and consequently, of the educational and socialising role the family plays (Robertson-Elliot 1996, 102-103). In the anthropological dimension, not only does the very pattern of the family as an educational environment change, but also the attitude towards the family resulting in weakening its role in the process of education is being revised.

The concept of the family, particularly in modern Western societies, is evolving. It does not necessarily mean the rejection of traditional understanding of an educational role of the family (Rahilly 2015, 340-341; Robertson-Elliot 1996, 34-35). The semantic scope of the concept of the family indicates that the idea of a traditional family based on a stable and exclusive marriage, being a relationship of a man and a woman in which children are born and raised, has been widened. This traditional view of the family has not disappeared completely and is continued by the more conservative and religious communities. At the same time, new family patterns emerge; for example, those in which the importance of marriage (whether it is a religious union or a civil one), stability and exclusiveness in a relationship (open or free relationships, 'patchwork families') are being relativised. New models of relationships are being accepted, and the importance of an offspring for building a family is being redefined (Bernstein 2015, 322-326; Natalier and Hewitt 2014, 906). Not only do these changes mean the reformulation of the very idea of the family, they also redefine relations among the people within the family itself (e.g. regarding the relationship parents – children), and this directly influences the educational importance of the family (Robertson-Elliot 1996, 35; Rehel 2014, 126-128). Appreciation of subjectivity of children implies the reflection on the authority that parents hold as well as positive and negative implications of their educational influence on children.

These phenomena are accompanied by the transformation of the attitude towards the family life and in particular, the educational role the family plays. The crisis of the family as a social institution along with the above-mentioned extension of the concept of the family has also questioned its authority as far as education is concerned (Noller and Callan 2016, 1-25). Contrary to the traditional, often highly patriarchal, model, the family – due to a variety of its forms – is not an implicit point of reference as far as ethical values, religious norms and patterns of behaviour are concerned (Pinquart and Silbereisen 2004). This contestation expresses the

opposition to the educational and socialising role of the family, which is viewed as trying to impose certain expected social roles on men and women who begin their independent life, and which does not take into consideration their need for self-identification and self-expression. This phenomenon raises an anthropological question as to the nature of the family. The question arises whether the family is only one of the external social structures shaping the generations of men and women, or perhaps it is a necessary environment for the socialising process and most of all for the children's personal growth.

1.3. The State and School in the Educational Process

In the classical approach to education, one should take into account the institution of a family alongside the role of state structures, among which the school is of particular importance. In this case, the school should necessarily be connected to the state, regardless of the form of organisation and ownership structure of a particular school, because the curriculum is dependent on the state educational policy. The schools of a particular character (religious or community schools) implement certain educational patterns aiming to provide their students with acceptable values. Despite that fact, they have to face manuals, reading lists or the very curriculum, which are either imposed or merely accepted by the educational authority, containing important information that shape students' conduct, support certain patterns of behaviour and present accepted social roles. Therefore, even in the case of public schools, which possess their own educational programme, the role of the state remains predominant. Political and philosophical issues are significant in the assessment of the educational influence of state institutions (Lewis 2006, 428-429; Moore 2003, 130-135). The curriculum often strengthens those patterns of behaviour that are desired by the government. It does that by promoting the stereotypical gender roles or by ignoring those ways of self-realisation of men and women, and their social and individual functioning that are not prevalent in a particular society (Blumberg and O'Leary 2007). In this context, many authors remind that education is not gender-neutral (Hamilton 2014; Natalier and Hewitt 2014; Rahilly 2015). At times, particularly in these aspects where the remnants of patriarchal attitude towards the division of social roles between men and women are noticeable, the versatile educational influence of the school intensifies existing inequalities. It is done by showing the students a priori what their role in a society should be. It also includes dividing given information or the way in which they are given, according to the criterion of biological sex. In such cases, the school becomes the element of social politics, which deepens injustice and destroys individualism, rather than providing the students with knowledge. Among other things, the curriculum might prepare the girls to be subservient and strengthen boys' belief that they should be independent and in want of power (Blumberg and O'Leary 2007; Moore 2003). A gender-related differentiation of education indicates to the students the only possible way of life and professional realisation.

On the other hand, by supervision of educational activities performed by all types of schools the state can play a positive role in eliminating stereotypes and enabling the students to grow personally. It is also able to fight against the displays of injustice present in all areas of social life. Undoubtedly, however, such position adopted by the state raises controversy as to how far state-run institutions should influence the educational process. Setting aside obvious issues regarding politics and opposing worldviews, the anthropological point of view requires raising the question of the primacy of a person over all kinds of social structures, including the state. The dignity of a person requires that such institutions as the school refrained from the destruction of individualism of students but rather supported them in their full personal and intellectual development.

2. Educational Demands

The specific nature of research conducted in the gender framework lies not only in its theoretical but also practical and postulative character. As far as educational issues are concerned, the observations regarding the context of the educational process as well as its environment and responsible institutions lead to conclusions and demands addressed to people who are responsible for the state educational policy as well as other participants of socio-political discourse.

2.1. Education for Equality

One can say without exaggeration that widespread false beliefs and stereotypes regarding different social groups are one of the most damaging factors in the process of education. They also challenge the dignity of men and women by classifying and dividing them according to false and harmful criteria. Different social groups, and in particular ethnic and religious minorities, suffer from all kinds of stigmatisation and judgement based on prejudice. Nevertheless, one can observe that as far as the educational influence is concerned, the gender-based stereotypes play a significant role in limiting the opportunities for men and women (Douchy-Oudot 2012, 46-47). It is generally maintained that these stereotypes affect women more than men, but it is possible to show that they also limit men. Stereotypes passed in the process of education carry a versatile content load. Some of them refer to work self-realisation assigning men and women separate educational paths, which are theoretically on par with their nature conditioned by their biological sex. Other prejudices are connected with social roles, with particular emphasis put on the possibility of performing responsible tasks or occupying key positions in political and social structures (Bass 2015, 375-380; Moore 2003, 43-46).

The just education, which takes into account gender diversity of men and women while being aware that it does not exhaust their full richness and potential, has to be therefore the education concentrated on the equality of opportunities in terms of both chances of professional realisation and ability to participate in socio-political life.

2.2. Education to Freedom of Expression and Self-Creation

The traditional model of social life provided men and women with clearly designed ways of self-realisation. They were connected with accepting a particular job providing income and starting a family based on a sustainable marriage of a man and a woman, who would pass this model of lifestyle onto the next generations (Moore 2003, 103-104). This educational model created repeatability of possible social roles and the ways of self-realisation of an individual. It gave men and women a sense of security based on their awareness of being a part of a long line of generations repeating this lifestyle. The security was also based on choosing those forms of self-realisation that were repeatedly tested, be it with respect either to a chosen profession or marriage and family life. While not questioning the value of such a model of development of men and women, and their transition in the educational and socialisation process from dependence to independence by any means, it should be taken into account that the stability of the social structure and consequently a sense of security of individuals take precedence in such a model over the right of every man and woman to independent creation of their lives. The richness of humanity of men and women can be limited to one sanctified model of education only at the cost of destroying that which defines the individuality and uniqueness of every human being.

The education should nowadays support the freedom of expression and self-creation. It does not necessarily mean the rejection of all traditional educational models, which used to prepare the children to lead a certain lifestyle. It does mean, however, that alongside traditional models there will also be space for other models, even if they were to be realised by minorities in society. The variety of ways of self-expression of men and women in the educational process can assist those who enter their adulthood to define themselves.

2.3. Education for Conscious and Free Participation in Social Life

Although a person is a social being, ontologically an individual comes before a community. For this reason, the purpose of the educational process, which also has a socialising character, is not adjusting men and women to the norms prevailing in a certain society by destroying their individuality and imposing external patterns of behaviour, but their education for conscious and free participation in social life.

The crucial condition is the removal of all forms of inequality and discrimination in the educational process. Their presence, even if hidden in a seemingly insignificant educational content (Blumberg and O'Leary 2007), contributes to raising next generations of men and women who copy instilled patterns of behaviour. These patterns, also unconsciously, reinforce numerous displays of injustice and oppression. Recognition of equal personal dignity of men and women demands the acknowledgement of their equal right to participate in public life and the freedom to define their place in society.

3. Catholic Criticism

The Catholic Church seems to be very critical of some political aspects of gender theories which are referred to as an 'ideology.' This criticism can be found in the Apostolic Exhortation *Amoris Laetitia.* Pope Francis writes that 'an ideology of gender' 'denies the difference and reciprocity in nature of a man and a woman and envisages a society without sexual differences, thereby eliminating the anthropological basis of the family. This ideology leads to educational programmes and legislative enactments that promote a personal identity and emotional intimacy radically separated from the biological difference between male and female. Consequently, human identity becomes the choice of the individual, one which can also change over time' (Pope Francis 2016, 56).

However, this papal statement does not necessarily mean that Christianity, or at least Catholicism, tends to reject social observations made from the point of view of gender research, and consequently its educational demands. In contrast to the diverse, and often controversial, ideological applications of gender theories, truthful consideration on the anthropological aspects of the gender-based analysis of education (which cannot be considered an 'ideology') indicates that we can find significant overlapping points, if not agreement as such (Allan 2015, 15-17; Barton 1996, 457-458; Parsons 1996, 463-464). It is possible to indicate three problematic areas in which one could see the above-mentioned overlapping points as well as lasting and currently inextricable differences.

3.1. The Primacy of the Family as an Educational Environment

From a Catholic anthropological perspective, the biggest problem is the description of the role of the family presented by gender researchers (e.g. Barnett and Hyde 2001; Goldberg 2013, 86-87; Hill Collins 1998, 62-64). Frequent demands to relativise the significance of the family as an educational environment and the increasingly explicit phenomenon of redefining the family meet with objection from the conservative Catholic circles.

A family is a unit of particular importance to religious groups. Religion sanctifies the family, provides it with the moral order, in which the members of a family are socialised. At the same time, the family is the most basic environment for religious practice and transmission of religious traditions. Therefore, changes in one of these realities imply changes in the other (Airhart and Lamberts Bendroth 1996, 3-7; Barton 1996, 451).

The Catholic Church acknowledges the existence of different family models, but it regards the traditional family model based on the matrimony of a man and a woman open for giving rise to and bringing the offspring up as the only valid model (*Catechism* 2010, 1638-1654). From this perspective, the Catholic Church supports the teaching regarding the key role the family plays in the process of education (*Catechism* 2010, 2207, 2221; Pope Francis 2013, 43). It can also be

noted that the Catholic Church struggles with acknowledging the fact that, at least in some socio-cultural contexts, the family based on religious marriage between a man and a woman is no longer the only or even the predominant model. Therefore, Catholic reflection on education should also include other patterns of family life, which – although they are not and need not be accepted by the Church – indeed exist and are becoming increasingly popular, and therefore play an increasingly important role as an educational environment.

It must be said that the Catholic Church, which favours the traditional model of a family and gives it the primacy to raise children, does not absolutize the family. Any educational acts are to serve the well-being and development of individual gifts of the children and allow them to choose their path of life freely and maturely. The family, from a Catholic point of view, is not a place of educational oppression, but the 'school of deeper humanity' (Vatican Council II 1965a, 52).

3.2. Auxiliary Character of Other Institutions

The Catholic Church emphasises the auxiliary character of other institutions and communities to the family as the primary place of education. It applies to both the Church itself, as well as public institutions, including schools (Vatican Council II 1965b, 3). It is not the responsibility of educational institutions to impose solutions consistent with the ideological option of those who are in power. Without a doubt, this trend would also comprise the Catholic rejection of such educational policies which in the name of certain social interests impose the only possible role in a society on men and women, and strengthen or expand existing injustice.

While stressing the primacy of the family in the field of education, the Catholic Church reluctantly addresses any ideologically motivated efforts, which would interfere with a set of standards and values given by parents to their children (Vatican Council II 1965b, 3, 6). The actions to change society, to eradicate stereotypes, to present non-standard models of family life encounter the resistance from the Church. This resistance does not seem adamant, however, if it is assumed that the stereotypes, injustice, manifestations of prejudice and oppression that exist in society are the expression of the pathology directed against an individual.

3.3. Education to the Completeness of Humanity

Undoubtedly, there are differences regarding the understanding of what is 'natural' for people and consequently the ability of self-realisation of a man and a woman as well as the scope of permissible self-creation, especially when it comes to gender roles. Despite that, from a Catholic point of view what deserves recognition is the demand for remodelling the educational process in such a way as to allow for the full implementation of all the potentialities of women and men. Firstly, it is necessary to reject anything that demeans the person (Jovic 2015, 35-36; Kurian 2012, 343-344; Vatican Council II 1965c, 5). Thus, it is necessary to oppose discrimination, injustice, and abuse – also in cases when it is gender-based (Hewitt 2012, 333-335;

Pirri-Simonian 2015, 95). Further, it is about shaping the complete human being and, therefore, about the development of their freedom, maturity, independence, and responsibility. Even if the scope of the responsibility and freedom remains disputable in the public debate, it is worth emphasising that from a Catholic point of view, a child, a young man or woman, who is subject to educational influences in the family or educational institutions, should be treated subjectively and personally. Although it cannot be denied that in the process of education the socialisation takes place, which enables men and women to function in society, this socialisation should not be linked to the negation of individual features, desires, needs, and plans.

Conclusion

Despite significant differences in anthropological background of gender theories and Catholic worldview, there are also substantial areas in which one could notice the similarity of goals. These common grounds can be seen especially in the struggle to remove oppression, inequalities or social injustice and to enable men and women, who enter adulthood, make their own autonomous decisions as far as determining their role in social structures and the way of experiencing and expressing their own identity are concerned. The existence of these common areas should motivate all parties engaged in the educational process to co-operate.

The existing differences are rooted in issues extending far beyond the theory of education. They reach the very anthropological foundations and the concept of a human being. Nonetheless, it does not mean that we should not try to overcome these differences or reconsider them. From a Catholic perspective, it is necessary to reflect on the conditions of educational processes in the post-Christian world, in which Christian life patterns and models of social structures have been questioned and marginalised. From the point of view of gender-oriented researchers, it would be useful to change the way the Church is perceived. The Church, despite its traditional standpoint on the education and social structure, is not an environment of oppression and discrimination but, according to its doctrine and its ethical implications, it strives to promote the dignity of every man and every woman.

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METHODOLOGICAL STATUS OF THE SOCIAL DOCTRINE OF THE CHURCH BEFORE THE SECOND VATICAN COUNCIL

Abstract

The present article raises the issue of the methodological status of the Church's social doctrine from its beginnings, namely, from the social teaching of Leo XIII, to the Second Vatican Council. In the first part, the author highlights the substantial role of the Magisterium in constituting the Church's social doctrine. The second part, presents an analysis of the key social documents of the Church, with particular emphasis on methodological strands. The reflection is based on the assumption that the Church's social doctrine is not just another ecclesial scientific discipline, since it involves a more complex reality in terms of practitioners, methods, sources of cognition or, finally, the nature of assertions formulated within that area of science.

Keywords: the Church social doctrine, methodology of the Church social doctrine, history of the Church social doctrine, Leo XIII, Pius XI, Pius XII, John XXIII

STATUS METODOLOGICZNY NAUKI SPOŁECZNEJ KOŚCIOŁA PRZED SOBOREM WATYKAŃSKIM II

Abstrakt

Przedmiotem artykułu jest zagadnienie statusu metodologicznego nauki społecznej Kościoła od jej początków, a więc od nauczania społecznego Leona XIII, do Soboru Watykańskiego II. W pierwszej części autor ukazuje Magisterium Kościoła jako aktywny podmiot w ukonstytuowaniu się nauki społecznej Kościoła. W drugiej poddaje analizie kluczowe dokumenty społeczne Kościoła, wydobywając z nich wątki metodologiczne. W podjętej refleksji przyjęto założenie, że w przypadku nauki społecznej Kościoła chodzi nie tylko o kolejną kościelną dyscyplinę naukową, ale o rzeczywistość bardziej złożoną pod względem podmiotów ją uprawiających, metod, źródeł poznania czy w końcu charakteru twierdzeń, do których dochodzi.

Słowa kluczowe: nauka społeczna Kościoła, metodologia nauki społecznej Kościoła, historia nauki społecznej Kościoła, Leon XIII, Pius XI, Pius XII, Jan XXIII

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Introduction

Determining the methodological identity of a given scientific discipline is an important element which constitutes that discipline at the same time defining its specificity and nature. Consequently, throughout the history of Catholic social teaching there have been numerous studies devoted to this subject. Some of them have the character of extended monographs, but most often methodological issues have been raised with reference to other questions. An important role has also been played by comprehensive studies of Catholic social teaching, since almost all of them contain either longer or shorter passages devoted to their methodological status.

However, the character of both methodological studies and the related discussions within Catholic social teaching differs from similar debates held in the area of other church disciplines. This is due to the active role of the Church's Magisterium which, along with theologians and social ethicists, took part in the scientific dispute and recurrently addressed this subject on various occasions.

The present study aims at illustrating the process of crystallizing the methodological identity of Catholic social doctrine from its beginnings, namely, from the social teaching of Leo XIII to the Second Vatican Council. In the first part, the reflection focuses on presenting the Magisterium as an active subject in the constitution of the ecclesial social doctrine. In the second one, the key social documents of the Church are analyzed in order to highlight the main methodological strands contained in them. The conducted research is based on the fundamental assumption that the Church's social doctrine is not just another ecclesiastical scientific discipline, since it involves a more complex reality in terms of practitioners, methods, sources of cognition or, finally, the nature of assertions formulated within that area of science.

1. Magisterium Ecclesiae as an Active Subject in the Methodological Debate

It is a specific paradox of the Church's social doctrine that, as a methodologically ordered reflection on social reality (scientific discipline), it emerged beyond the sphere of theological disciplines existing at that time, since it was developed within a strictly defined "theological space", namely, the teaching of the Magisterium, and more precisely, the Papal Magisterium. This is the only case in the history of Catholic theology, when its large section was created, developed, promoted and overviewed directly by popes through magisterial documents which had, in a sense, a definitive character, or in any case, were excluded from ordinary debates by the growing importance of the institution of *corpus doctrinae* (Benvenuto 1991, 11).

This situation, as must be clearly stressed, resulted from the absence of theology, especially moral theology, in the area of social issues as well as lack of competent theory of society or deep reflection on social life, and not some kind

of usurpation on the part of the Magisterium of the prerogatives of theology or an attempt at its marginalization. The emergence of Catholic social teaching as an independent and specific area of reflection within overall theological reflection took place not so much in result of theoretical reflection on its subject, methods and tasks, but rather under the influence of specific challenges that other ecclesiastical disciplines, and especially moral theology, could not adequately answer.

From the perspective of the Church's social doctrine, it is clear that the Papal Magisterium was not only the main protagonist of the new form and the significant development of scientific reflection about social issues within ecclesiastical disciplines, but it also became an active subject in the methodological debate on it. Some statements contained in social encyclicals referring to the theological character of Catholic social teaching or its explicit affiliation to moral theology (John Paul II 1987, 41; John Paul II 1991, 55) met with disapproval on the part of representatives of the Church social doctrine, who perceived in them an attempt at providing an arbitrary solution to the methodological status and epistemological problems of Catholic social teaching, and thus expanding the competences of the Church *in rebus fidei et moribus* to matters related to the methodology of science.

2. Leo XIII and the Beginning of a New Path

Clear methodological references, first to the character of papal enunciations on social issues, and later also to Catholic social teaching as ecclesiastical and academic discipline, can be found in all major social documents beginning with the encyclical *Rerum Novarum* of Leo XIII, which constitutes a response to "*the first great social question*" (Pontifical Council for Justice and Peace 2005, 89). It is this encyclical that "marks the beginning of a new path. Grafting itself onto a tradition hundreds of years old, it signals a new beginning and a singular development of the Church's teaching in the area of social matters" (Pontifical Council for Justice and Peace 2005, 87).

However, from the chronological point of view, a thorough reading of the Leo XIII's documents allows to discern some statements about the nature and specificity of Catholic social teaching that appeared in encyclicals preceding the announcement of *Rerum Novarum* in 1891, since already the Pope's inaugural encyclical *Inscrutabili Dei Consilio* contains significant words about the Church as the "Mother and Teacher" of the world and modern civilization, which will not only after more than half a century later become the title of the first social encyclical of Saint John XXIII, but themselves show the basic paradigm of the Church's presence in the world (Leo XIII 1878)[2]. Perhaps at the beginning of Leo XIII's long pontificate when, on one hand, the echo of the *Syllabus* was still loudly resounding, and on the other, the modernist crisis together with all, sometimes painful, countermeasures, stood on the doorstep, that paradigm was still difficult to grasp, but it already began to crystallize itself.

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[2] "Quod si plurimae aquae memoravimus bona, ab Ecclesiae ministerio et salutari peprofecta,

The remaining encyclicals by Leo XIII preceding *Rerum Novarum* contained statements which carried similar overtones. In the encyclical *Immortale Dei* from 1885, Leo XIII refers to the metaphor of the soul and body to define the relations of the Church and the state, and wants the state to be guided by the principles and norms of Christian philosophy. In turn, in a polemic with liberalism contained in the encyclical *Nobilissima Gallorum Gens* of 1884, the Pope expresses his opposition to the abandonment in the political life of dogmatic and moral norms manifested by the very nature of God. The encyclical *Graves de Communi* of 1901, contains, in turn, an important statement that the social question has foremost a moral and religious dimension. The motif of separation of Church and state will often return in subsequent encyclicals in the course of developing the concept of "indirect power of the Church" in temporal rights (especially encyclicals *Libertas* (1888), *Sapientiae Christianae* (1898) and *Annum Ingressi* (1902)). By this teaching, Pope Pecci will also create the foundations for the activities of the Catholic Action and Catholic social structures.

The encyclical *Rerum Novarum* itself barely addresses the issue of methodology or the nature of the social discourse of the Church. Above all, it calls for renewing Christian customs (Leo XIII 1891, 45) and, moreover, mentions the teachings of the Gospel, "upon those teachings whereby the conflict can be brought to an end, or rendered, at least, far less bitter" (Leo XIII 1891, 13).

The encyclical expresses the Church's self-awareness about the need to manage the lives and customs of individuals by means of the commandments (Leo XIII 1891, 13). Indirectly, it also shows the dual cognitive order of laws governing social life (the reason and Christian faith) when she speaks of the nature of state power (Leo XIII 1891, 28).

3. *Rerum Novarum* as the Doctrinal Prototype of Catholic Social Teaching

The significance of the encyclical *Rerum Novarum* will find its repercussions most forcefully in subsequent social documents, from the encyclical *Quadragesimo Anno* of Pius XI, to *Centesimus Annus* of John Paul II. It found a synthetic expression in the Compendium of the Church's social doctrine: "*Rerum Novarum* dealt with the labour question using a methodology that would become 'a lasting paradigm' for successive developments in the Church's social doctrine. (…) The whole of the Church's social doctrine can be seen as an updating, a deeper analysis and an expansion of the original nucleus of principles presented in *Rerum Novarum*. With this courageous and farsighted text, Pope Leo XIII gave the Church 'citizenship status' as it were, amid the changing realities of public life" (Pontifical Council for Justice and Peace 2005, 87; John Paul II 1991, 60).

Many documents constituting the *corpus socialis*, having an anniversary character in relation to the publication of *Rerum Novarum*, undertook its

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verasunt 'humanitatis civilis opera ac decora, tantum abestut Ecclesia Christi ab ea abhorrea team verespuat, ut ad sesepotiusaltricis magistrae et matri seius laudem omni nocen seat pertinere."

reinterpretation, emphasizing its prophetic character and significance for the development of the whole social doctrine of the Church. Pius XI defined the content of the encyclical *Rerum Novarum* as "a safe way to settle the difficult matter of human coexistence, the so-called social issue (...) at a time when it was desirable and even necessary" (Pius XI 1931, 2).

Pope Ratti perceives it also as a response to the pleas addressed by scholars dealing with social, employers' and workers' issues addressed to the Apostolic See "to show a safe path" (Pius XI 1931, 7); an answer given after a thorough examination with the help of professional experts on the matter, and above all, an answer which was a manifestation of the apostolic office (Pius XI 1931, 8).

The encyclical *Rerum Novarum* was therefore the fruit of Leo XIII's imperative of conscience in the face of social appeals and challenges of the time. Social science drawing inspiration from that document will hence be marked by this connotatory responsiveness of the Church to the challenges of a given epoch. It is worth emphasizing here the occurrence of the above-mentioned situational factor at the beginning of Catholic social teaching. From the very outset, it was one of major factors determining its specific character and identity, although in the course of its further evolution it began to be dominated by the theoretical dimension.

The subsequent jubilees of the encyclical *Rerum Novarum* provided an opportunity to show its significance in the development of social science. After four decades since the publication, Pius XI called it a "*Great Card* for all Christian work in the social field" (Pius XI 1931, 39). Pius XII in the Pentecost radio address to commemorate the 50th anniversary of the encyclical *Rerum Novarum* will once again bring this term, and refer to the encyclical itself as a fertile seed from which Catholic social teaching developed (Pius XII 1941, 6-7). Furthermore, as regards the teaching of the encyclical, the Pope will highlight its epistemology based on natural law and the Revelation (Pius XII 1941, 4). In turn, Saint John XXIII in the encyclical *Mater et Magistra*, proclaimed on the 60th anniversary of *Rerum Novarum*, will emphasize "its effective and long-term influence". In the first place, it is manifested in subsequent documents of the popes, "who, following in the footsteps of Leo XIII in economic and social matters, always drew upon Leo's encyclical, either lecturing and explaining its content, or encouraging Catholics in their undertakings" (John XXIII 1961, 9). Pope Roncalli also stressed the importance of the encyclical on the science and institutions of many countries, paying attention to the timeliness and importance of carefully researched principles, norms of conduct and admonitions (Jan XXIII 1961, 9).

The encyclical *Rerum Novarum* became a prototype of subsequent documents of the Church, as well as a model for the further development of social science and a point of reference for Christian social activity. In addition to the aforementioned existential dimension, this model dimension is perceived by the Compendium of the Church's social doctrine in such elements as: material object (study of the current social issue), formal object (carrying out proper assessment

of social issues in the light of principles in order to create a just social order), sources of cognition and the method (examining social issues in all different social and political manifestations in the light of principles based on Revelation, natural law and morality), subject (the Church and everyone interested in resolving social issues), prophetic and critical function (discovery of errors that cause social evil, introduction of social changes, improvement of justice) (Leo XIII 1891, 89-90).

Mariano Foralosso, commenting on the contribution of Leo XIII and the encyclical *Rerum Novarum* in defining the shape and identity of the social teaching of the Church, points not so much to the inaugural first social encyclical, but to some terms used with reference to it in the first social documents ("safe principles", *Magna Charta*, summa of Catholicism in the social and economic area, foundation, etc.) as the ground for the development of the concept of social science as a deductive, holistic doctrinal system, separated from historical events and deaf to pluralism of the social situations of a given epoch, what in the period of the Conciliar reception became the reason for its contestation (Foralosso 1993, 210). It seems that this kind of interpretation of comments to the encyclical by the Magisterium is only partially justified and should always be referred to the broader doctrinal and theological context in which a given document was created.

4. From *Rerum Novarum* to the Second Vatican Council

Leo XIII, when making an attempt at identifying possible solutions to the issue of labor, referred to the right-obligation to speak on social and economic matters (Leo XIII 1891, 13). This principle was most fully articulated by Pius XI and, in the context of the present investigations, it seems plausible to recall the course of the Pope's reasoning since it well reflects the specificity of the Church's social teaching. The author of *Quadragesimo Anno*, justified the Church's right to present its stance in matters of social life by the inextricable nature of the moral and economic order: "Even though economics and moral science employs each its own principles in its own sphere, it is, nevertheless, an error to say that the economic and moral orders are so distinct from and alien to each other that the former depends in no way on the latter" (Pius XI 1931, 42).

At the same time, the Pope emphasized that the goal of all directions of human activity, and thus also economic activity, must be synchronized with the ultimate goal of man, because he is striving toward God in an integrated way, in the full range of his personality. Therefore, a person should endeavor to learn about this goal of the economic life, so that it would not preclude his final vocation. In turn, the distinction between two areas of human activity in the field of economics, namely, the technical and moral, provided for the Pope a premise to define the nature and scope of the Church's competence in economic matters and recognize the latter as belonging to the competence of the Church: "The Church, however, can in no wise renounce the duty God entrusted to her to interpose her authority,

not of course in matters of technique for which she is neither suitably equipped nor endowed by office, but in all things that are connected with the moral law. For as to these, the deposit of truth that God committed to Us and the grave duty of disseminating and interpreting the whole moral law, and of urging it in season and out of season, bring under and subject to Our supreme jurisdiction not only social order but economic activities themselves" (Pius XI 1931, 41).

Subsequent documents and elaborations on the social doctrine of the Church will hark back to that differentiation with reference to the issue of the validity of the statements formulated by the Church concerning social issues. It is worth mentioning here that the intention of the Church is to distinguish many levels in social teaching, hence those documents mention "principles of reflection", "criteria of judgment", "direction of action", rather than specific norms. By her teaching, the Church wants to lead, and leave the faithful make the decision or abandon it. Each person should give an answer, on the one hand adhering to the Church's teaching and, on the other, referring also to other sources of knowledge, either more permanent ones, which include reasoned reflection, or more variable ones, which include human sciences and social sciences (John Paul II 1987, 1).

The Church's right-obligation "to develop a social doctrine of her own and to influence society and societal structures with it by means of the responsibility and tasks to which it gives rise" (Pontifical Council for Justice and Peace 2005, 69) involves an immanent prophetic and critical function. Notwithstanding the fact that, at the time of the reception of the encyclical *Quadragesimo Anno* and the dynamic development of Catholic social structures as well as numerous centers of studies and dissemination of Catholic social teaching, this function did not constitute its key attribute, it is difficult not to interpret a number of Pius XI's documents by this prism. It suffices to point in this respect to the Pope's social encyclicals directed against various totalitarian systems, or even the teaching of Pius XII during the war, in which the Pope, besides indicating the evil of totalitarianism, also drew visions of restoring the future social order based on the assumptions of Christian personalism.

The ultimate explanation of the Church's right-obligation with respect to her own social teaching with interesting epistemological references was found in the already mentioned radio address on the occasion of the 50th anniversary of the encyclical *Rerum Novarum*. It can be treated as expanding the interpretative horizons, which in the long run resulted in a more dynamic approach to the problem of the social discourse of the Church. It is worth quoting this longer passage here, since it also touches on other important methodological issues developed in subsequent social documents, most fully in the encyclical *Sollicitudo Rei Socialis* of John Paul II: "It is, on the other hand, the indisputable competence of the Church, on that side of the social order where it meets and enters into contact with the moral order, to decide whether the bases of a given social system are in accord with the unchangeable order which God, our Creator and Redeemer,

has shown us through the natural law and revelation, that twofold manifestation to which Leo XIII appeals in his encyclical, and with reason: "For the dictates of the natural law and the truths of revelation spring forth in a different manner, like two streams of water that do not flow against one another but together from the same divine source; and the Church, guardian of the supernatural Christian order in which nature and grace converge, must form the consciences even of those who are called upon to find solutions for the problems and the duties imposed by social life. (...) how could the Church, loving mother that she is, solicitous for the welfare of her children, remain an indifferent onlooker in their danger, remain silent or feign not to see or take cognizance of social conditions which, whether one wills it or not, make difficult or practically impossible a Christian life in conformity with the precepts of the Divine Lawgiver?" (Pius XII 1941, 4).

Pope John XXIII's social teaching seem very interesting from the methodological point of view. On the one hand, it expands on the existing ideas, developing the earlier tendencies or trends and, on the other, it may be recognized as groundbreaking, however, without undermining the essential identity and unity of the Church's social doctrine (Congregation for Catholic Education 1988, 12).

The Pope defines Catholic social teaching as "instructions in the area of social issues based on the needs of human nature itself and animated by the principles and spirit of the Gospel" (John XXIII 1961, 15). He also uses other terms expressing the nature of the social doctrine of the Church, namely: Catholic teaching in social and economic matters (John XXIII 1961, 15), orders and principles of teaching the Catholic Church in social matters (John XXIII 1961, 16), the basic principles for renewing the coexistence between people and, at the same time, renewal of economic and social life (Jan XXIII 1961, 17). The Pope mentions also the basic principles upon which a genuine social and economic order must be built (John XXIII 1961, 24). All the above documents clearly show the social doctrine of the Church as an abstract and coherent doctrinal *corpus*.

On the other hand, the social teaching of John XXIII, as none of the previous ones, points to the significance of the temporal, existential dimension, thus expressing the historical dynamism of social phenomena. Adhering to the significance of the first two social encyclicals, the Pope includes in the Church's tasks direct contribution to providing solutions to the urgent social problems that affect mankind. At the same time, he emphasizes that the principles developed in those documents should be implemented under new conditions, and that the role of the Church, apart from explaining the social doctrine itself, consists also in showing in what sense those principles and recommendations concerning the social system, should be adapted to the changed historical conditions (Jan XXIII 1961, 28).

The contextual dimension of John XXIII's social teaching was additionally strengthened by its anthropological aspect, since the Pope, was not only convinced that "Catholic social doctrine is an integral part of the Christian conception of life" (John XXIII 1961, 222), but he regarded this anthropological and personalistic

dimension as the basis of Catholic social doctrine: "This teaching rests on one basic principle: individual human beings are the foundation, the cause and the end of every social institution" (John XXIII, 219).

Such an explicit recognition of the importance of historical thinking in an official papal document, thinking which was becoming more clearly manifested in the scientific discourse of the first half of the last century, became a breakthrough whose consequences affected the overall theological thought. The social teaching of John XXIII well illustrates the phase of transition from the period in which historical thinking remained for a long time at the periphery of theological reflection (from Saint Justin's times, through Origen, all Christian Neo-Platonism, St. Thomas Aquinas and scholastics) and in which was dominated by the theology based on the assumption that the reality which it describes - ideal, divine, eternal and immutable - is "ahistorical", to the approach in which history is understood as creative, generative and personalizing. Man in his entirety as well as the reality that he touches upon is the object and subject of history. Man is history in himself, subject not only to time but also to the dimension of space, which is the second "non-negligible" category of historicity (Bartnik 1994, 209).

The process of enhancing the historical element in the theological and social discourse of the Church was accompanied by a second one with a similar, if not greater, impact on the Christian theological and social thought, which must be described as an anthropological breakthrough. It is manifested in the adoption and development of an integral personalistic concept, on the one hand, emphasizing the value and dignity of the human person, and on the other, the autonomy of earthly realities already mentioned several times in this study. It resulted in a different view of man's involvement in earthly matters and, moreover, led to adopting as the basis of all analyzes, evaluations and decisions, including social ones the moral thought understood in the Christian dimension, which means that man is perceived integrally in his corporal and spiritual constitution, taking into account his supernatural vocation and emphasizing the dignity and values, in the light of which the question of his transcendence in relation to the sphere of social life becomes clear (Greniuk 1991-1992, 50-51).

Gerardo Tomás Farrell, an Argentinean scientist dealing with the social doctrine of the Church, in a characteristics of the social teaching of Saint John XXIII, particularly pertains to the Latin phrase of *singulos homines*, contained in the already mentioned passage of the encyclical *Mater et Magistra* and emphasizes that it is a particular, concrete man that constitutes the object of interest for the social discourse of the Church. Farrell contends that by adopting this perspective, John XXIII was able to abandon the static concept of the natural law. At the same time, he perceives in it a strong connotation with the concept of "common good" recurrently appearing in the encyclical (Farrell 1993, 31-32). The replacement of this concept by John XIII, and even more frequently by Paul VI, with such terms as: man, human dignity, human rights, justice, etc., was a manifestation of a more

dynamic interpretation of the natural law. All those confirm the abandoning of the social doctrine of the Church as an abstract, closed and holistic system, whose application to the life of a specific man and the world's history is possible only through deduction. This process will find its continuity in the reflection of the Second Vatican Council on the relation between the Church and the world, which demands that "correct assessment of the relationship between the political community and the Church should take place" (Vatican Council II 1965, 76). This was to be promoted by the conciliar theology of the signs of the times as well as a shift towards a new inductive-deductive method.

Conclusion

The growing importance of historical thinking as well as the anthropological breakthrough, besides leading to a different view of human involvement in earthly matters, resulted in adopting a different perspective on the place of the Church in the world, and indirectly also influenced the nature of the Church's social doctrine ultimately orienting the whole theology anthropologically. From then on, the Church, while addressing the issue of human activity in the world and proclaiming certain principles of social order, derives them from anthropological statements. From the encyclical *Mater et Magistra*, the official social teaching of the Church as a starting point accepts the principle that man is at the foundation of all structures (Curran 1986, 189-2003).

The dignity of the human person, conceived of on the basis of the full truth about man, provided the foundations for Catholic social teaching. This anthropological perspective on the whole reality of human social involvement will be expanded upon by successive popes, especially, St. John Paul II, who made an attempt at presenting the most complete vision of the person (Meures 1987, 222-236).

To sum up the methodological aspects of the Church's social doctrine contained in the stance of the *Magisterium socialis* in the period from the encyclical *Rerum Novarum* to the Second Vatican Council, it must be stated once again here that the Magisterium proved to be an extremely creative subject in the debate on the identity of the Church's social teaching. Individual popes, and even particular social encyclicals, appear as milestones in the process of its development, they set the directions for reflection, highlight and, above all, enliven the social *praxis* of the ecclesiastical community and individual faithful.

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SOCIAL INSURANCE FOR CLERGYMEN UNDER CANON LAW

Abstract

The present paper raises the issue of social insurance for the clergy in the Catholic Church. The first part provides the historical background, norms of the 1917 Code of Canon Law and indications of the Second Vatican Council. The next part discusses the current decrees of canon law and solutions adopted in Poland. At present, the Church has abandoned the beneficial system. Systemic church solutions are based on state legislation. In their absence, decisions are made by the Bishops' Conference, as well as individual particular Churches. It refers both to social and health insurance.

Keywords: insurance, social insurance, health insurance, clergymen, canon law

UBEZPIECZENIA SPOŁECZNE DUCHOWNYCH W PRAWIE KANONICZNYM

Abstrakt

Opracowanie dotyczy ubezpieczeń społecznych duchownych w Kościele katolickim. W pierwszej części zarysowano historię zagadnienia, następnie normy Kodeksu z 1917 r. oraz wskazania Soboru Watykańskiego II. W dalszej części omówiono aktualne dyspozycje prawa kanonicznego oraz rozwiązania w polskiej sytuacji. Aktualnie Kościół porzucił system beneficjalny. Systemowe kościelne rozwiązania mogą istnieć w oparciu o ustawodawstwo państwowe. W razie ich braku decyzje podejmuje Konferencja Episkopatu, jak i poszczególne Kościoły partykularne. Chodzi tak o ubezpieczenia socjalne, jak i zdrowotne.

Słowa kluczowe: ubezpieczenia, ubezpieczenia społeczne, ubezpieczenia zdrowotne, duchowni, prawo kanoniczne

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Introduction

When Jesus called his disciples, they enthusiastically responded to the call and followed the Master of Nazareth, leaving all their former lives. Today, the choice of priestly vocation also means following Jesus, however, in the current context of life and ministry of the Catholic Church clergy, it is necessary to take into account some practical aspects of contemporary requirements, including applicable legislation. One of them is the issue of social insurance for the clergy. The Church's social teaching that developed in the twentieth century also applies to clergy and church workers. The present study will outline the development of the canonical legal thought on social insurance of the clergy. The research will cover the period from the promulgation of *Codex Iuris Canonici* in 1917 to modern times. What assumptions does the clerical insurance base on? What legal and practical solutions have been developed in the Catholic Church in this respect? Social insurance is understood here as insurance covering medical treatment in case of an illness or temporary health condition (health insurance), as well as insurance covering long incapacity to work (pension insurance).

The first part will provide the historical background of the issue, the next will present the assumptions resulting from the norms of the common law under the 1917 Code. Next, the author will refer to selected indications of the Second Vatican Council, which had an impact on the transformations in the scope of previously existing solutions. The next part of the study, will address the current legal indications regulating the issue of social insurance for the clergy. The last part will be devoted to the respective legal norms adopted in Poland.

1. Historical Background

For many centuries, the Church relied on the beneficiary system, which secured financial support for church institutions, structures and the clergy, and at the same time provided social security. It can be assumed that in the ninth century the term benefice was already well-established in practice and in the church law (Rybczyk 1995, 262-265; Paschini 1949, 1305-1309; Mandelli 1949, 1310-1314). At that time, goods remaining at the disposal of the bishop and securing his maintenance (bishop's mensa) began to be separated from canonical goods (canonical prebendaries) (*Podręczna* 1913, 411). Allocated beneficiary goods secured the maintenance of individual canons. Among the various groups of emoluments, there were mainly bishops, Canon, parson and religious benefices. Very often, a benefice consisted of a real estate and the profit that it brought; although, various forms of contributions, wages and other sources income developed over time.

Due to a variety of practices, as well as diverse legal solutions associated with benefices, the Church conducted a reform of the canon law. *Gratian's decree* (about

1140) and subsequent changes to church law resulted in subjecting benefices to church legislation (Wójcik 1987, 15). One of the reform's significant goals was releasing the clergy from dependence on the owners of private churches. In the 12th and 13th centuries an idea of church benefice was developed as an office of emolument, constituting a legal person (Wójcik 1987, 15). The term *fabrica ecclesiae* was concurrently used. Both terms (*beneficjum, fabrica ecclesiae*) were interpreted as designating a legal person or church property. Gradually, a distinction was made between beneficial assets, which served to maintain the beneficiary, and goods belonging to *fabrica ecclesiae*, which were to secure the construction and maintenance of churches and church buildings. However, until the 20th century, canon law did not always define the specific purpose of benefices assigned to local churches, i.e. it often provided both for the beneficiary's needs as well as for the goals of religious worship.

2. Codex Iuris Canonici 1917

In the *Codex Iuris Canonici* of 1917, the norms regulating church benefices are contained in Part V (*De beneficiis aliisque institutis ecclesiasticis non collegialibus*), of the Code's third book (Canons 1409-1494) (Codex 1917; Pasternak 1970; De Paolis 2001, 126- 133). The issue of benefices, which were connected with the majority of church offices, was particularly broadly addressed in chapter 25 (*De beneficiis ecclesiasticis*, Canons 1409-1488) of the discussed Code.

The code's norm stipulated that the clergy were entitled to ecclesiastical benefices and salaries (Codex 1917, Canon 118). The contemporary idea of the benefice was understood in the strict sense (Canon 1409) as a juridical being constituted perpetually consisting of a sacred office and the right to receive the revenue accruing from the endowment of the office (Codex 1917, Canon 1409). In the broader sense, benefices included also other revenues, such as: salaries, offerings of the faithful, stole fees (*iura stolae*), etc. (Codex 1917, Canon 1410). The legislature from 1917 distinguished various offices (Canon 1411). Further norms concerned the establishment of offices and benefices, union of beneficiaries, their transfer, division, as well as changes and abolition, and the imposition of new burdens on beneficiaries. A large part of the norms on benefices was associated with the issue of church offices, and therefore, with canons from book II of the Code of 1917 (*De Personis*).

After taking possession of the benefice, the beneficiary enjoyed certain rights but also assumed some obligations (Canon 1472). It should be noted that the beneficiary was not the owner of the beneficial property, but a user and administrator of goods (Bączkowicz 1957, 397). When administering the property, the beneficiary was expected not to infringe on its material substance, preserving it as a whole. Naturally, it was possible to introduce some changes that resulted from rational economy. The beneficiary became the owner of benefice revenues,

though within certain limits, because he could use them only to provide for his own adequate maintenance, and any superfluous revenues were to be used for the benefit of the poor or for other good purposes (Codex 1917, Canon 1473). Adequate maintenance meant: food, clothing, housing, employment of servants, fair entertainment, medical treatment, etc. (Bączkowicz 1957, 206; Stawniak 2013, 111).

The shortness of the present study prevents a full analysis of norms regulating the income of clergy, based on the Code norms on benefices, which also served social and health purposes. However, it should be added that social and political changes in many countries led in recent centuries to confiscation or nationalization of classically understood beneficiary goods. This was the result, among others, of the so-called depreciation acts, which implied taking over church goods by state authorities (Act 1950). The issue of benefices varied in different countries. Canonical norms often lost their validity, due to manifold historical and social conditionings prevailing in many countries, as well as in mission areas, where benefices ceased to exist in the last centuries.

Furthermore, it should be noted that, the so-called *iura stolae* provided a growing income as regards the overall revenue of the clergy (Biskupski 1966, 113-115). They included religious services rendered by the clergy, mainly administration of sacraments and sacramentals, during which the faithful made voluntary offerings. The right of the clergy to these offerings was often associated with performance of various pastoral duties. Although, it must be added that offerings related to religious services were and are a non-permanent source of income.

3. The Second Vatican Council

In the twentieth century, the beneficiary system, which was the core source of maintenance for the clergy, became inefficient and obsolete. Over time, it provoked legal and pastoral controversies (De Paolis 2001, 127-133). The guidelines of the Council decree *Presbyterorum ordinis* recommended that the beneficial system should be abandoned or reformed (Second Vatican Council 1965b, 20). The changed system was planned to be based on the institution of the diocese, which was to be managed by the bishop with the help of chosen priests, as well as secular experts in economics (Second Vatican Council 1965b, 21). Consequently, in countries where maintenance of the clergy depends entirely or largely on the offerings of the faithful, such offerings would be centrally collected and allocated for the needs of priests. Such a system harks back on the idea of Christian communities described in the Acts of the Apostles in Jerusalem, in which the members "had everything in common" (Acts 4,32) and their possessions "were distributed to each according to need" (Acts 4,35) (Dole 1984, 197-198).

Moreover, the previous legislation system was problematic due to the fact that it linked the concept of the church office with the benefice. The Council intended to highlight the concept and meaning of the ecclesiastical office as separated from the

benefice. Income from the benefice was meant to be only of secondary importance (Wójcik 1977; Wójcik 1981; De Paolis 2001, 134-137). Another source document of the Council related to the discussed matter was the *Christus Dominus* decree (Second Vatican Council 1965a, 16, 18).

Priests have the right to equitable remuneration, which is also evidenced by the evangelical statement: "for the laborer deserves his payment" (Luke 10,7, cf. 1Cor 9,14). Equitable remuneration is to secure the various needs of the clergy, including those concerning health and social security. The faithful should provide resources necessary to allow their shepherds lead honest and dignified lives. Bishops, on the other hand, are supposed to remind the faithful of this duty to provide fair remuneration for those who are in the service of the People of God or who carried out some tasks in the past (Second Vatican Council 1965b, 20). Such remuneration should enable the clergy to fulfill the duties of their own state, and also allow them to undertake works of mercy towards the needy.

It must also be added that, according to the Conciliar teaching, the remuneration associated with the ministry of the clergy should not be conceived of in terms of regular earning. Priests, internally free from disordered attachments, should adopt a properly distanced attitude towards temporal goods (Second Vatican Council 1965b, 17). Clergymen are to avoid any attitude of greed, on the contrary: they should practice voluntary poverty (Second Vatican Council 1965b, 17). The thought that priests should adopt a proper attitude towards earthly goods, as well as practice voluntarily poverty, was reiterated in post-Conciliar documents of the Church Magisterium (John Paul II 1992, 30; Kongregacja ds. Duchowieństwa 1994, 67). The above mentioned ideas of the Magisterium should also be referred to social security.

As regards social security, a more important text is an excerpt from the conciliar decree *Presbyterorum ordinis*: "Moreover, in nations where social security for the clergy is not yet aptly established, let the episcopal conferences see to it that-in accord with ecclesiastical and civil laws-there may be either diocesan institutes, whether federated with one another or established for various dioceses together, or territorial associations, which under the vigilance of the hierarchy would make sufficient and suitable provision for a program of preventive medicine, and the necessary support of priests who suffer from sickness, invalid conditions or old age" (II Vatican Council 1965b, 21).

The Council's indication is that appropriate institutions responsible for social issues should be established at the level of episcopal conferences. Next, the document recommends priests actively engaged in pastoral care, to be guided by the spirit of solidarity and to support such institutions. By entrusting their future fate to ecclesiastical solutions, they will be able to serve the faithful even more deliberately and to practice poverty. The issue of health and social insurance was referred to in the post-conciliar document *Ecclesiae Sanctae* (Paulus VI 1966, I 8). Subsequently, the *Ecclesiae Imago* Directorate reminded about the need for social

and health security: of both the clergy who are currently serving the faithful and those who no longer perform priestly ministry because of illness, disability or old age (Sacra Congregatio pro Episcopis 1997, 137).

4. 1983 Code of Canon Law

The Church has always been concerned about people, their welfare and needs. In the twentieth century, modern countries developed the concept of human rights. This idea also appears in church documents. In the Encyclical *Pacem in Terris*, Pope John XXIII indicated that those rights included health care and necessary services provided by the authorities for the benefit of individuals, and that people were also entitled to social security in the event of illness, incapacity for work, widowhood, old age, unemployment or an unconscionable deprivation of life resources (Joannes XXIII 1963, 11).

The above-quoted thought from the Church's Magisterium as well as the indications of the Second Vatican Council were elaborated in the *Code of Canon Law* of 1983. The first part of the current Cannon 1274 of this Code is devoted to the maintenance of the clergy, but the second section deals with the issue of social insurance. "Where social provision for the benefit of clergy has not yet been suitably arranged, the conference of bishops is to take care that there is an institute which provides sufficiently for the social security of clerics" (*Code* 1983, Canon 1274 § 2).

The binding norm applies to the whole Church, whose clergy work and live in different countries, and hence in differentiated social security systems. Whereas, in countries where such systems do not exist or do not function properly, it is necessary to provide proper care for sick, elderly or disabled priests or those injured in various accidents. Thus, the Church recommends organizing insurance, although it refers to the action of ecclesiastical authorities as optional, depending on the needs, local conditions and norms of state law. Essentially, church social security should have an inter-diocesan character, unlike maintenance which is regulated in a particular diocese. The church legislator points to the Bishops' Conference as the entity, which should define and provide solutions or set up insurance institutions (Domaszk 2016, 177-180). A specific decision on the establishment of an appropriate institution belongs to individual bishops forming the Conference (Combalia 2004, 89). Potential activity of the Bishops' Conference complements or supplements the solutions that are often included in diocesan support programs for the clergy (Kennedy 2000, 1476). It should be added that even the existence of this type of common solutions between dioceses does not absolve the diocesan bishop from providing care for the health and social needs of the clergy (Combalia 2004, 90).

The issue of proper insurance also occurs in codex norms among the rights and duties of the clergy. In Canon 281, the first section deals with proper maintenance, while the second part addresses the question of due insurance:

"Provision must also be made so that they possess that social assistance which provides for their needs suitably if they suffer from illness, incapacity, or old age" (*Code* 1983, Cannon 281 § 2). Particular Bishops' Conferences can implement different solutions with respect to providing care for elderly and ailing priests (National Conference of Catholic Bishops 1991, 50-52). Retirement is usually associated with the attainment of certain age, e.g. 75; in the same way, the pastor or bishop who has reached this age is asked to submit his resignation from office (*Code* 1983, Cannon 401 § 1, 538 § 3). Retired pastors should be provided for by a particular diocese or a higher diocesan structure within the framework of the Bishops' Conference with respect to providing their maintenance and professional care, also with the help of non-church institutions (Lynch 2000, 369).

In turn, the content of the *Pastor Bonus* constitution obligates the Congregation for the Clergy, at the level of the whole Church, to monitor and supervise the question of social security of the clergy: "The Congregation carries out everything that pertains to the Holy See regarding the regulation of ecclesiastical goods, (…) and it further sees to it that serious thought is given to the support and social security of the clergy" (John Paul II 1988, 98).

Care for the clergy's needs at the local level, also in the area of social security, rests with individual diocesan bishops (Congregation for Bishops 2004, 80). The church legislature directly defines in the Code of 1983 the duties of the diocesan bishop: "He also is to take care that provision is made for their decent support and social assistance, according to the norm of law" (*Code* 1983, Cannon 384). If necessary, a common fund should be created in the particular Church to cover the various needs of the diocese (Congregation for Bishops 2004, 191). It is possible that, depending on local conditions, this type of diocesan fund will be allocated for health insurance or the support of elderly or ailing priests. Sometimes, establishment of separate pension funds allows particular Churches to provide protection of diocesan goods in case of legal conflicts. Among other things, this applies to those clerics who abandon the priesthood and demand provision of pension from this type of funds, e.g. in the USA (Morrisey 2000, 284-285).

Diocesan or inter-diocesan funds dedicated to healthcare or social security can be raised from a variety of incomes. Those may include contributions of the concerned clergy themselves, church foundations, but also other means and goods, such as: *iura stolae* offerings, e.g. from binated Holy Masses; property of expired non-autonomous foundations (Canon 1303 § 2); state subsidies; donations; church collections, etc. When individual contributions are inadequate, a diocesan bishop may consider the possibility of imposing a tax on specific entities.

Ensuring proper clerical insurance can also be linked to the transformation of previously existing beneficiary solutions. According to Canon 1272 of 1983CIC, the Bishops' Conference, in consultation with the Holy See, defines the manner of managing the legacy of benefices. At the local level, it is possible to link former beneficial goods with insurance funds.

Insurance, when related to diocesan structures, may give rise to interpretation difficulties. For example, in a situation where other clergy, e.g. religiouses, perform some duties and tasks in the diocese, but not in relation to the church office (in the strict sense of the term). In such cases, one should remember to take into account relevant solutions regarding insurance stipulated in the agreement between the diocesan bishop and the superior of that clergyman who will undertake diocesan duties. Moreover, it is necessary to mention those clergymen who after years of working in other structures (e.g. university professors or missionaries) return to the diocese or are being transferred (change their incardination) from other particular church or from a religious institute: *ad experimentum*, and who should also be adequately insured (*Code* 1983, Canon 267-268, 693; Dole 1984, 204).

The situation of clergy who were subject of church punishment may also present a specific case: they cannot be deprived of means necessary to ensure their decent maintenance, according to Canon 1350 of the 1983Code. It seems that, while imposing punishment, it is necessary to take into account the continuity of social and health insurance. However, if a person is finally removed from the clergy, they must take care of their adequate insurance.

Social and health insurance may in part converge with the issue of adequate clerical support. The latter should take into account the nature of a person's ministry, quality of work, education, needs related to housing, social security, leisure or other conditions to maintain distributive justice, but also the simplicity and poverty of an evangelical life (Artner 2009, 13-17). Priests should be able to pay appropriate contributions or buy a health insurance policy, as well as pay contributions to pension funds from the funds received for their ministry. Adequate social security, as well as sufficient support, allow the clergy to maintain their inner freedom and release them from excessive concern for material matters and their future. Thus, they facilitate full involvement in performing ministerial duties (Zambon 2002, 266-268).

5. Clerical Insurance in the Polish Context

Over the past centuries, clerical needs in Poland were secured by beneficiary arrangements. To put it in a nutshell, it can be stated that norms in this area (Codex 1917) functioned until the 1940s. The tragic events of World War II, radical changes in the borders of the Polish state after the end of the war, and the communist rule resulted in a completely new situation. State administration, among others pursuant to the Act of 1950 on the seizure of the rights of a dead hand, seized significant areas of agricultural real estate and other property rights, which practically eliminated the existence of church benefices.

In this situation, maintenance of the clergy and provision of their social needs over the next decades depended practically on the generosity of the faithful. The main source of maintenance for priests was the income from Sunday contributions, the offerings of mass scholarships and the *iura stolae* as well as other offerings.

It should be noted that the clergy in Poland, as the last social group, became embraced by the insurance system as late as in 1989 (Act 1989b; Stanisz 2001; Bach 1994) Prior to that, only a small number of priests were insured.

Currently, the clergy in Poland are compulsorily insured on the basis of statutory solutions of the state social insurance system (Act 2008a; Act 2009; Act 2008b). The basis for insurance is usually a contract of employment, for example in the case of clergymen employed as catechists at school (religion teachers). In this case, the employer deducts social security and health insurance contributions from such a person's salary. Those who are not employed based on a contract are treated and insured according to the legal sense of the term "clergy" (Stanisz 2011, 305-307). In the case of accumulating types of insurance, social insurance under the concluded employment contract prevails.

Under the Polish law, the term "clergy" is analogously treated in relation to social and health insurance. It refers to the clergy (sacrament of Holy Orders) and members of the male and female religious orders of the Catholic Church, but also of other religious organizations with a regulated legal situation. Alumni of Catholic seminaries are insured just as religiouses in initial formation, if they are over 25 (for social security); insurance of persons below 25 is voluntary.

Compulsory social insurance covers retirement, disability and accident insurance; sickness insurance is voluntary (requires an additional contribution). Diocesan clerics pay their own contributions, and the superiors of monastic houses (monasteries) regulate the fees of order the members. The premiums are calculated based on the minimum wage in a given year, which is specified in the Regulation of the Council of Ministers (Stanisz 2011, 309-310).

In the case of contributions paid in respect of insurance for the "clergy", the interested parties pay part of the insurance contribution (pension, disability, accident), which amounts to 20% of the overall sum, and the remaining 80% is paid by the Church Fund (structure related to the state budget). This solution applies mainly to parish priests and consecrated persons who are not employed based on the contract of employment, for example those working in schools as teachers. A separate solution applies to members of contemplative orders and missionaries during their missionary work outside Poland, for whom the whole contribution is paid by the Church Fund.

Compulsory contribution ensures the future pension benefits at the minimum level. That is why, those interested can raise the amount of paid insurance contribution at their own request. It is also possible to apply other optional variants of insurance contracts, in addition to the mandatory system. Particular churches or religious institutes in Poland may include their clerics or religiouses in additional insurance options (e.g. life insurance) or health insurance (Act 1989a, Article 71 paragraph 2). An example of solutions addressed to diocesan priests are retirement residencies for priests. In connection with their functioning, the particular law very often stipulates establishing separate earmarked funds.

Regulations regarding compulsory health insurance which relate to the broadly understood "clergy", are separate from those defining social purposes. Obligation of health insurance also refers to alumni of senior seminaries, postulants, novices, juniorists, male and female orders.

The ways of calculating contributions for health insurance may vary. Those who pay the personal income tax or the flat-rate tax for the "clergy's" income, pay a contribution for this insurance individually. In the latter case, i.e. the flat-rate tax, the amount is calculated in relation to the applicable minimum wage (Stanisz 2011, 313). However, in the case of alumni, postulants, novices, juniorists and clergymen who are not taxpayers of the income tax, appropriate contributions are regulated by the Church Fund.

One more important issue related to the Polish context of insurance for the clergy is the document of the Conference of the Polish Episcopate, which in 2015, published an instruction on the management of temporal (ecclesiastical) property (Polish Bishops' Conference 2015). The instruction reminded that in the matter of social security every clergyman is subject to Polish law. Consequently, the clergy are obliged to register for insurance, pay due contributions and fill in relevant documentation; when priests enter an employment relationship (sign an employment contract), these duties rest with the employer (Polish Bishops' Conference 2015, 5.4).

The Polish Bishops' Conference also recommends that in order to provide adequate social security for ill, disabled or retired clergy, a *subsidium charitativum* institution should be established in every diocese. Detailed regulations in this respect should be stipulated by the particular law of a given diocese (Polish Bishops' Conference 2015, 3.8, 5.5).

The next indication of the Polish Bishops' Conference is that the right to adequate and decent maintenance (*congrua et decora sustentatio*) of the clergy, which consists of remuneration and social security, should be essentially the same for all who are in the same condition (Polish Bishops' Conference 2015, 5.6).

Conclusion

In the 20th century, the Catholic Church worked out two Codes of canon law. In the first of them, a number of norms regulated the beneficiary system, which ensured the maintenance of clergy and, indirectly, addressed the issue of social and health security. The Second Vatican Council called for a change in the beneficiary system, among others, pointing to the need for both adequate insurance, medical care, as well as the proper maintenance of presbyters affected by illness, disability or old age.

The current Code of 1983, marks a radical change, which consists in departing from the beneficiary system. Legal changes allowed, among others to adapt the issue of clerical insurance to the realities of the modern world, including the economic sphere. In particular, two regulations refer to adequate insurance for the clergy. These are canons 281 § 2 and 1274 § 2. System solutions can already

exist on the basis of state legislation. If there are no such solutions in a particular country or region, the Bishops' Conference should take appropriate action. Very often, the state structures or episcopal norms can be supplemented by insurance systems at the level of individual particular Churches. Those may include both social insurance, related to retirement, and disability, and health insurance.

Clergymen in Poland are covered by systemic and obligatory solutions based on the norms of state law. Separate acts regulate social insurance and health insurance. Specific regulations concern the clergy and religiouses, seminarians, consecrated persons who are generally recognized in the system of the Polish law the "clergy". The developed system allows for covering the necessary clerical insurance, as well as that of consecrated persons and seminarians.

Appropriate solutions stipulated by canon law, in connection with the state law regulations enable providing a solution with regard to specific social need of a given social group. They also allow the clergy to focus their attention on their most primary task, namely, the mission of proclaiming the Gospel.

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PHILOSOPHY

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AXIOLOGY OF THE ETHICAL AND SOCIAL TEACHINGS OF JOHN PAUL II: A RESEARCH PROBLEM

Abstract

The aim of this article is to present the research problem of the reconstruction and presentation of the axiological layer of the ethical and social teachings of John Paul II, which is implicitly included in his papal writings and documents. The innovative nature of this research results from the fact that until now none of the known publications of his teachings have systematically and thoroughly laid out axiological problems, which constitute an immanent part of his teaching. Papal teaching is generally subjected to analytical and synthetic research from the point of view of theology, Catholic social science, sociology, political sciences and at times philosophy, but never from the point of view of the theory of values. The research will be the first attempt to synthesize the axiological thought of the transcendental humanism of John Paul II.

Keywords: axiology, values, doctrine of the Catholic Church, transcendental humanism, theory of values, socio-ethical teaching

AKSJOLOGIA NAUCZANIA ETYCZNO-SPOŁECZNEGO JANA PAWŁA II. PROBLEM BADAWCZY

Abstrakt

Celem artykułu jest podjęcie problemu badawczego, jakim jest zrekonstruowanie i zaprezentowanie aksjologicznej warstwy nauczania etyczno-społecznego Jana Pawła II, która implicite zawarta jest w pismach i dokumentach papieskich. Nowatorski charakter problemu badawczego wynika z tego, iż do tej pory w żadnych ze znanych publikacji dotyczących tego nauczania nie ma opracowanej, w sposób systematyczny i gruntowny, problematyki aksjologicznej, która stanowi jego immanentną część. Nauczanie papieskie poddawane jest na ogół badaniom analityczno-syntetycznym z punktu widzenia teologii, katolickiej nauki społecznej, socjologii, politologii, czasami filozofii, natomiast nigdy z punktu widzenia teorii wartości. Przeprowadzone badania będą stanowić pierwszą próbę syntezy myśli aksjologicznej humanizmu transcendentnego Jana Pawła II.

Słowa kluczowe: aksjologia, wartości, doktryna Kościoła katolickiego, transcendentny humanizm, teoria wartości, nauczanie społeczno-etyczne

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Introduction

The purpose of the proposed research will be reconstruction and critical analysis of the axiological thought of John Paul II. We will also strive to illustrate the reception of the axiological thought of John Paul II. We believe that this project is the response to the lack of such studies in the area of axiological research. We assume that there is an integral and specific axiological system in the Pope's writings and statements that has not been described in detail to date, which must prompt consideration.

A series of arguments indicates that this is not a question which we have already positively answered. A) The synthesis of the axiological work of John Paul II has not been formulated to date. We can only guess it on the basis of the papal writings and statements, as well as a few scattered attempts of their axiological analysis. B) It is reasonable to argue that the Pope, due to the office he serves, must proclaim principles of axiology resulting from theological doctrine of the Catholic Church, of which he is the official depositary. However, this does not mean that scientific research on the issue itself should not be undertaken.

The fact that we are dealing with the thought of the Pope cannot negate the need for a critical analysis of his axiological thought. It seems interesting to investigate whether Pope John Paul II contributed something new to Christian axiology. An important example which arises in this context is the different approach to axiological understanding of the dialogue category. Pope John Paul II was an advocate of ecumenical and interreligious dialogue (he is frequently called "the Pope of dialogue"). He was also the organiser of regular meetings in Assisi with representatives and spiritual leaders of various churches and religions. Thus, he needed to go beyond the narrow and confessional understanding of the axiological doctrine of the Catholic Church, such as the kind of understanding proposed by Pius XI in his encyclical *Mortalium Animos* (Pius XI 1928)**.** In that document the Pope criticised false ways to uniting religious, and thus also rejected dialogue, because he believed that it led to meetings, conventions, lectures and conferences, which could suggest that all religions are good and praiseworthy (Pius XI 1928). This text reveals a completely different perspective that John Paul II adopted in the area of dialogue.

We believe that it is erroneous to assume that John Paul II's ethical and social teaching, and hence, the axiology that set them (Jan Paweł II 2005) were unchanged in relation to his predecessors, because the Pope perceived new problems arising from the "spirit of the times" and took into account the truths and values that had previously not been sufficiently recognised, or have been noticed to a small extent. It seems to us that the Pope adopted a different approach to looking at and solving these problems, which resulted from a different perception of humanity and society. We believe that John Paul II did not derive the status of a human person, his dignity, human rights resulting from it and human "rightful autonomy" (Jan Paweł II 2005, 51-52) from the concept of natural law and Revelation which are a specific Christian humanism built on the biblical quotations – but rather emphasised the soteriological way of recognising the dignity of a human person, which guarantees the transcendental

character of the Church's action as well as the independence and autonomy of the earth reality. It seems, therefore, that John Paul II approached the concept of "natural law" cautiously, wishing to avoid framing humanity and society in such a way that would simplify reality, reducing it to broadly understood anthropocentrism, in which there is no place for such categories as sin, salvation, etc., and which are necessary for complete understanding and explanation of temporal reality.

We put forward the hypothesis that although John Paul II's axiology is anthropocentrically oriented, this anthropocentrism has a specific character, which may be described as, following the trend of John Paul II's statements, as transcendental humanism or "true humanism". The justification for this formulation can be found in: John Paul II, *Redemptor hominis*, no. 10. The Pope writes: "The man who wishes to understand himself thoroughly and not just in accordance with immediate, partial, often superficial, and even illusory standards and measures of his own being – he must approach Christ with his anxiety, uncertainty and even his weakness and sinfulness, with his life and death" (Jan Paweł II 1982, 19), which remains more closely associated with Christ (Jan Paweł II 1982, 19), since, according to the Pope, "in Christ and through Christ, humanity has achieved full awareness of its dignity, its elevation, the transcendental value of its humanity, the sense of its being" (Jan Paweł II 1982, 21), and "people cannot fully understand themselves without Christ. They cannot understand who they are or what their proper dignity is, or what their ultimate vocation and destiny are" (Jan Paweł II 1979, 22). We put forward the hypothesis that John Paul II's transcendental humanism is rooted in his earlier philosophical thought, from the period of his work in teaching and research. This hypothesis is naturally justified by the fact that Karol Wojtyła ascended to the papal throne with a developed axiological background. He came to the papacy with a specific axiological background. He was a determined theologian, a scholar of Thomism, as well as phenomenological philosophy, especially the theory of values of Max Scheler, who was the subject of his habilitation dissertation (Wojtyła 1991). In addition to Christian axiology, the Pope also had a broad experience with the ideologies of Marxism, Leninism, Nazism and fascism as systems of denying Christian values. He also had a deep awareness and experience of progressive secularisation and practical atheisation. We therefore believe that the official papal documents and statements had to contain his earlier intellectual legacy in the area of axiology.

1. The Importance of the Project and the Current State of Knowledge

Reading and analysis of scientific literature on the social teaching of John Paul II makes it clear that there is no position in the publishing market that would systematically and explicitly show the axiology to which John Paul II referred his ethical, social as well as theological teaching. Meanwhile, the subjects raised by scholars of papal thought, both in Poland and abroad, the range of which is impressive, are limited to more or less accurate presentation or interpretation of the Pope's thought, which emerges from the available documents and speeches.

Nevertheless, we have not found any monographs that would be strictly devoted to attempts at reconstructing the axiology on which John Paul II's ethical, social and theological teaching are based on or to which they refer. Indeed, many of these items take up such issues as human dignity, work, peace, justice, dialogue, human rights, solidarity, the issue of women, ecumenical dialogue, interreligious dialogue; however, such texts have a purely descriptive character and usually reduce to quoting speech fragments, without drawing or reconstructing a comprehensive overview of a given value along with its genesis, or its ontic or epistemological status. It may seem that authors writing on this subject fear making far-reaching axiological interpretations.

These publications are usually theological analyses, sometimes sociological, rarely theological, and practically never axiological. There are also frequent texts without any deeper understanding, being rather religious journalism instead. It should be noted that the existing publications, especially those with multiple authors, often "pretend" to be monographs, being *de facto* publications of loosely related post-conference materials with a new title. On the publishing market it is easy to find books that are the aftermath of finalised and funded research projects, which relate to various aspects of the writings and pastoral work of John Paul II, but their substantive quality is unsatisfactory. For example, in the book *Jan Paweł II i Europa* [*John Paul II and Europe*], published by a major scientific publisher, one of the researchers writes: "The Pope's *de facto* controversial words in the encyclical *Crossing the Threshold of Hope* remain somewhat at odds with what John Paul II does to deepen the dialogue" (Janiak 2009, 294). This fundamental mistake of the writer's ignorance which was not picked up either by the book reviewers or corrected by its editors shows a certain superficiality, dilettantism and even a lack of competence in undertaking research in this area.

The attempt to reconstruct the axiology of the ethical and social as well as theological body of work is justified by the inadequate state of research into this specific aspect of it. The fact that not even one modest book can be found, which is devoted strictly to the axiology of the ethical-social issues, especially in Poland – where papal teaching have seen a vast bibliography of shorter and longer texts – can be somewhat surprising. One must remember that John Paul II, being a trained philosopher of ethics, expressed in his texts the belief that every moral norm and social principle in fact protects specific values, which are necessary for truly human life – for example, the norm "thou salt do not kill" protects the value of human life and "thou shalt not steal" protects someone's property. Therefore, the analysis of specific moral and social norms that emerge from the entirely of the Pope's teaching, will allow us to explore the broad spectrum of the world of values that John Paul II appreciated. This is also important and interesting from the point of view of the scientific biography of Karol Wojtyła. He was deeply immersed in Thomism, if only because of his studies in Rome's Angelicum, or because of his academic and didactic work in the Lublin philosophical school. This school, however, rather negated the need to distinguish axiology as a separate discipline, because, as its leading representative and outstanding scholar, Prof. Father Stanisław Kamiński wrote: "Therefore there is no need to practice axiology as a separate philosophical discipline, since the important overall findings fit within the theory of being, while specific issues

can be found in anthropology, philosophy of religion, ethics and aesthetics, or possibly in the philosophy of culture" (Kamiński 1989, 305).

However, Karol Wojtyła's philosophical interests in phenomenology, such as Max Scheler, as well as his numerous contacts with the so-called Krakow milieu, drew the future Pope to reflect on the world of values, which later found a proper place in his teaching. Thus, the discovery of this spectrum of values, and thus exposing them in the way that the Pope understood them in the metaphysical, epistemological, semiotic or humanist sense (Kamiński 1989, 305), would enrich existing analyses undertaken in relation to his thought. It is also worth noting that in modern times, when, to quote M. Heidegger, thinking according to values is often considered the greatest blasphemy against being, a book about the philosophical issues of values in the Pope's teaching could be a *sui generis* guide in the world of values.

2. Innovation and Relevance of the Project

The innovative nature of the project stems from the fact that to date, none of the known publications on the selected research subject (including in foreign literature available to us), no author has systematically and thoroughly presented the axiological issues which, it would seem, are inherently contained within it. Papal teachings are generally subjected to analytical and synthetic studies from the point of view of theology, Catholic social teaching, sociology, political science, and sometimes philosophy, while never from the point of view of the theory of values. If axiological problems appeared, it was usually only in the area of education and upbringing, which is a strongly reduced approach in relation to the wealth, as we postulate, of the axiological content hidden in the legacy of John Paul II.

 The subject of analysis are not only the most important documents published by the Pope, i.e. Encyclicals, exhortations and apostolic letters, but also proclamations, speeches, sermons, etc., since relevant content for the issues taken up in this work may be found even in organisational or pastoral documents. The publication of the planned monographs, it may be hoped, will not only make it clear that not everything in papal teachings has been discovered, that there are still relevant and interesting areas for intellectual exploration, the extraction of which may contribute to the re-reading of the written legacy of John Paul II and become an inspiration and an incentive for exploration and innovative interpretation.

The project will be of crucial importance in the development of knowledge about the axiological thought of John Paul II. The study will be the first attempt to synthesize the axiological thought of transcendental humanism of John Paul II. The research will be used in the analysis of the formation and development of Catholic social teaching, which until John Paul II's pontificate developed in the area of Thomism, while John Paul II wanted to go beyond this philosophical tradition (personalism, phenomenology). Achieving the goals of the project will contribute to a better understanding of the philosophical foundations shaping Catholic social teaching. The study will help to reveal not only John Paul II's theory of values, but will also say a

lot about the historical period in which John Paul II lived and served his mission, and capture the development trends of European culture. Also not without insignificance will be the contribution of the study to the development of Polish philosophical and social thought, of which John Paul II remains a representative.

As a result of the research, two monographs will be published. One will be devoted to the axiology of ethical and social teaching. The second will focus on the axiological dimension of the theological and religious thought of the Pope. Writing two complementary monographs will be an important contribution to the development of Polish knowledge about one of the most important intellectuals and spiritual leaders not only in Poland, but in the world. The exploration of the Pope's axiological thought may reveal an important *novum.* The publication of these monographs will provide potential readers with knowledge about the genesis, significance and meaning of the axiological issues in John Paul II's teachings. The monographs will attempt to methodologically integrate the studies from an area in accordance with the competencies of the project authors. These works will show how Pope John Paul II (somewhat) synthesised the Thomist methodological scepticism towards the theory of values and praxeological values with the absolute affirmation of such trends as phenomenology, the Baden school, or the French school of philosophy of the spirit Certainly an interesting clue would be the discovery of how much the Pope knew these last two trends, as well as the degree to which the views of these major axiological schools were reflected in the papal texts.

Such a study would shed new light on the intellectual figure of John Paul II as a philosopher implicitly cultivating, in the course of his pontificate, this discipline, to which he devoted his theological and philosophical studies and his teaching and research work in his youth. These studies can therefore bring important elements to the biography of the Pope.

3. The Concept and Plan of Research

The concept and plan of the research is shown in the following schema showing the research proceedings: collecting texts which are the subject of analysis; analysis of their axiological dimension (status of values, understanding the values, hierarchy of values, structure); axiological challenges/dilemmas of modernity as the socio-politico-historical context of the resulting texts, from which axiological statements were taken; outline of specific axiological problems from the perspective of John Paul II's thought, such as secularism, human rights, the promotion of women, work, the social question, social rules); search for philosophical inspirations for the axiology of John Paul II (Scheler, Mounier, Maritain, Ingarden, Styczeń, Tischner); attempt at synthesis.

4. Research Methodology

The analysis of the axiological nature of the teaching of John Paul II requires a clear definition of the way of understanding the axiology through the prism of which we will

analyse papal writings. It is an objectistic axiology in terms of existence and knowledge of values. In our understanding, the world of values exists beyond the cognitive subject. It is possible to discover in rational and emotional acts, where reason, intuition and emotions play an important role both in the existentialist and essentialist aspect. Values are possible to discover as transhistorical and transcultural entities. Values, therefore, can be systematised and categorised. We thus reject the subjectivist approach, which claims that the source of values is the evaluating consciousness of the subject and its preferences related to the structure of transcendental consciousness or individual empirical consciousness. We also reject any historical and cultural determinism in the sense of values. In terms of exploration of values, we stand in the position of classical axiological absolutism. Getting to know the values in our understanding is possible and certain in *a priori* acts thanks to intuition and intellect combined with emotions. We therefore reject the perspective of relativism and axiological probabilism.

From the methodological point of view, the type of texts which will be the subject of the axiological analysis must also be specified. These will be papal writings and speeches of an ethical, social and theological nature. This requires, therefore, making it clear that we are interested in two types of statements: strictly theological, as well as those that go beyond this issue and are related through issues of morality, society, politics, culture, etc. The axiological analysis will therefore concern two areas, which in the scientific language of the discipline represented by the project authors will be defined as: transcendence and immanence; the sacred and the profane; the temporal and supernatural order.

We will strive to reconstruct the mechanism of formulating the papal documents of significant axiological importance. It is common knowledge that the Pope consulted the documents and speeches he authored. The "co-authors" of the papal documents were: Episcopacies of individual national Churches, theological commissions, recognized intellectuals in the clergy and laity. We therefore believe that these milieus could leave their mark on the axiological thought of John Paul II, even by identifying and taking into account the state of spiritual and national development of a specific society or the particular ethical and social, political, economic and cultural problems of the world at the turn of the 20th and 21st centuries.

Another starting point for the applied research method is the assumption that new humanism, otherwise known as transcendental humanism, proposed by John Paul II in his teaching, implies a certain axiological background in the form of a system of values rooted in the supernatural. Taking into account the fact that John Paul II, as a philosopher, comes from a particular philosophical tradition, i.e. Thomism (studies at the Angelicum, work in the Lublin philosophical school), which negates the need for the existence of axiology as a separate discipline, there is a need for the reconstruction of the system of values which despite this, is implicitly contained within his teaching and which we wish to clearly show in the writings analysed. The planned research will be informative in nature. The basis, and the first stage of the study is a broad research query which will include predefined texts characteristic of the papal teaching. The study will be aimed at problematisation of the axiology discovered in John Paul II's text.

The research will be comparative in nature. The comparative methodology will consist of the comparison of the axiological issues of philosophical character with axiological issues of theological character. From the broad range of positions in contemporary comparative studies, we select those that are best suited to the aims of the research intended to highlight axiological issues within the socio-political and religious-theological teachings of John Paul II. We will prefer the search for "network" connections between these two axiological areas. We hypothesise that there will be a dominance of the attitude of dialogue and interaction between religious values typical of the theology of Christianity and the cultural, social and utilitarian values resulting from the inculturation of the Gospel. However, we are not excluding issues typical of generic comparative studies (reception, filiations).

The proposed research methodology will be interdisciplinary. This will be manifested in the attempt to synthesise the axiology of Catholic socio-philosophical thought of John Paul II with the axiology of this theological thought. Their separate identification and problematisation will be complemented with an attempt at an integral reading of them as a coherent system of values. The research will lead to the drafting of two problem monographs, synthesising John Paul II's axiologies in the dimension of the philosophical foundations of Catholic social teachings and its axiology resulting from the theological premises.

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TURBULENCE AROUND PATRIOTISM: PHILOSOPHICAL PERSPECTIVE

Abstract

The aim of the article is to determine the place of patriotism among other universal values and a philosophical reflection on its current formula. The analysis is based on the classical philosophy of Aristotle, Thomas Aquinas, J. Maritain, E. Gilson, J. Woroniecki, J. M. I. Bocheński, M. A. Krąpiec and John Paul II. The article consists of two parts. Part 1 poses several questions concerning patriotism in the light of ongoing cultural transformations. Part 2 deals with patriotism as a virtue according to classical ethics to propose answers to these questions.

Keywords: patriotism, homeland, virtue, morality

ZAWIROWANIA WOKÓŁ PATRIOTYZMU. PERSPEKTYWA FILOZOFICZNA

Abstrakt

Celem artykułu jest określenie miejsca patriotyzmu wśród innych wartości uniwersalnych oraz refleksja filozoficzna nad jego aktualną formułą. Analizę prowadzi się w oparciu o filozofię klasyczną (Arystotelesa, Tomasza z Akwinu, J. Maritaina, E. Gilsona, J. Woronieckiego, J. M. I. Bocheńskiego, M. A. Krąpca, Jana Pawła II). Artykuł składa się z dwóch części. W części 1 zostaje postawionych kilka pytań na temat patriotyzmu w związku z trwającymi przemianami kulturowymi. W części 2, aby zaproponować odpowiedzi na te pytania, rozważa się patriotyzm jako cnotę w nawiązaniu do klasycznej etyki.

Słowa kluczowe: patriotyzm, ojczyzna, cnota, moralność

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INTRODUCTION

The aim of the paper is to determine the place of patriotism among other universal values. Patriotism understood as an attitude of an individual or a group of people may, of course, be studied with the use of methods derived from the humanities or social sciences. However, one of the most suitable tools is philosophy which is a reflection aimed at explaining the ontological foundations of the investigated facts. Philosophical reflection on the essence of patriotism allows us to put in order all the aspects of this social phenomenon outlined in multidisciplinary research. This paper consists of two parts: Part 1 presents several questions which may be asked today in relation to patriotism and Part 2 discusses the moral dimensions of patriotism in order to indicate where to look for answers to the above questions. The latter part is based on the texts of such authors representing the tradition of the realistic philosophy as Aristotle, Thomas Aquinas, Jacques Maritain, Etienne Gilson and modern Polish thinkers: Jacek Woroniecki,[2] Józef M. I. Bocheński[3] and the representatives of the Polish School of Classical Philosophy.[4] The texts of John Paul II are also mentioned.

The paper presents a sample of Polish philosophical thought on patriotism, when this issue again has become the subject of discussion in many countries[5]. The reference point in this debate was a lecture of Alasdair MacIntyre (1984), who critically argued against proponents of modern liberal morality claiming that patriotism is rather a vice than a virtue. This American philosopher defined patriotism in terms of a kind of loyalty to a particular nation (MacIntyre 1984, 4). Although he emphasizes that this definition is formulated on behalf of Aristotelian philosophy, he does not give full details about patriotism as a virtue articulated in this philosophical tradition. My article explores them.

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[2] Jacek Woroniecki OP (1878-1949), Professor of *Angelicum* in Rome and Rector of the Catholic University of Lublin, Thomist philosopher, theologian and educator. The publication of his extensive work on ethics was suspended by communists until 1986.

[3] Józef Maria Inocenty Bocheński OP (1902-1995), Rector of the University of Freiburg, sovietologist, logician and analytic philosopher.

[4] The Polish School of Classical Philosophy continues the tradition of ancient and medieval philosophers, primarily Aristotle and St. Thomas Aquinas. The School goes back to the late 1940s when after World War II, the Catholic University of Lublin (KUL) became a Mecca for researchers that represented realistic philosophical thought (Krąpiec and Maryniarczyk 2010). Among the most important philosophers were the Rector of KUL Mieczysław Albert Krąpiec (1921-2008) and Karol Wojtyła (1920-2005), the future pope (John Paul II).

[5] There is now a lively philosophical debate about the moral aspects of patriotism and a deliberate seeking of the ethos of a well-functioning polity as an alternative to nationalism. See e.g.: *The Ethics of Patriotism: A Debate* (Kleinig, Keller and Primoratz 2015).

1. Questions Related to Patriotism

Patriotism used to be, and for some remains, an important factor in the socialisation of the individual and realisation of their own humanity (Skorowski 2006, 363; MacIntyre 1984, 10). However, one may ask in this context whether in the light of the current civilisation changes patriotism is absolutely necessary or perhaps it may be replaced by other factors.

Today, we are witnessing the processes of integration, mingling of cultures, religions, nationalities. People tend to concentrate on their own problems and preferences rather than on social issues. The changes in morality have resulted in weakening national bonds as well as understanding of the notion of citizenship. Today, the development of civil society is not so closely connected with national state as it used to be. For some time, the idea of new individualism has been an important stimulator of the social change (Heywood 2009, 38-41), which has given rise to questioning the notion that society should be perceived as a whole (the basic point of reference for patriotic attitudes) or even made people distrust a community by definition.

Also, it is worthwhile to look at patriotism in the context of localism, i.e., granting significance to small communities, widely promoted today. Without empirical studies, it is difficult to estimate whether "little homelands" have indeed replaced in the social awareness the traditional homeland understood as a national and state community. However, the change of meaning can be seen even at the purely semantic level: the notions "homeland" and "little homeland" are not equivocal. It should be asked in this context if local patriotism is to represent national or republican attitudes, or to replace them.

The next question concerns the processes of European integration and globalisation, which began after World War II. For example, Anthony Giddens writes about the cosmopolitanism imperative which requires a modern European to be able to live in the globalised world where disparate beliefs and ways of life co-exist (Giddens, 2014, 147-216). Undoubtedly, globalisation is changing the understanding of the nation and the nature of such nation-making factors as culture, a national market, territory, and the state. It results in internationalisation of the economy, loss of importance of borders and sovereignty of states whereas culture is becoming transnational (Heywood 2009, 109-111; Krzysztofek and Szczepański 2005, 247). These changes make us reflect on patriotism and the necessity of redefining this notion. Such attempts have already been made. For example, a German philosopher, Jürgen Habermas said that in the times of globalisation (and multiculturalism) patriotism loses its cultural character and becomes a legal-constitutional term (referring not to the ethno-cultural difference but shared citizenship, rights, administrative and political institutions) (Habermas 1993, 25-26).

The post-war discussions of German intellectuals, focused on the problem of Germany's responsibility for World War II, inspired a search for a new principle of

the national identity of the Germans (Kobyliński 2017, 45-47). It began to be seen in democratic values, and not as before, in the concept of a nation. The concept of constitutional patriotism oriented towards the state and its institutions was initially developed (Dolf Sternberger) in the 1960s. It began to gain its final shape in the 1980s in the research of Jürgen Habermas, and, after having passed a kind of test in the early 1990s following the unification of East and West Germany, it became the project of universal importance. While developing his concept, Habermas began to present it as interesting for the organization of modern societies whose stability, due to the cultural and religious differences of their members, should be based not on tradition, but on law (constitutional state of law).

Due to changes in the political system in Poland and its accession to the EU, the subject of patriotism has become of great import also for the Polish society (see, e.g.: Król 2004). It should be noted, however, that for Poles tradition-oriented patriotism, whose foundations were rooted in Christian values, was a matter of national existence. Poles' cultural identity helped them survive as a nation despite the imperialist policies of Germany and Russia in the 19th century. In patriotism oriented towards traditional values, the Poles found the strength to oppose German nationalism and Bolshevism during World War II. After the war, guarding these values, they did not succumb to Sovietization when, as a result of the Yalta Conference (1945), Poland found itself under Soviet occupation for over 40 years.

As can be seen, a discussion about the modern formula of patriotism should start with the question about the essence of patriotism. Is patriotism good or bad? Considering its validity, it is necessary to remember that the globalisation processes have been an object of criticism. For example, David C. Korten, an American economist, believes that globalisation leads to the erosion of the civil society, weakens the national state at the international arena, and destroys social solidarity, at the same time violating the basic principles of justice (Korten 2002, 29-96). Also, Krzysztofek and Szczepański, Polish sociologists, say that globalisation incites what we call "nationalism" or "ethnocentrism" and this co-occurs, paradoxically, with the decreasing importance of nations, their cultures, and traditions, which are superseded by global culture (Krzysztofek and Szczepański 2005, 266).

The criticism of the globalisation processes is accompanied by the prediction that a strong state community will arise to counterweight the interests of international corporations, and this again gives rise to the question about the definition of patriotism. Will the patriotism of the future concern national states or larger international formations such as the European Union? Such a wish was expressed by Winston Churchill in his speech made on September 19th, 1946, when he called for the creation of a unified Europe and formation of close civic and patriotic bonds between its nations (Giddens 2014, 9-10). After the signing of the Maastricht Treaty (1992), which called the European Union into existence, Jürgen Habermas investigated the problem of national identity and the EU citizenship. As a result, he proposed the above-mentioned project of constitutional patriotism

(Habermas 1993, 26). At present the process of European integration undergoes a crisis. Even the well-known Euro-enthusiast, Anthony Giddens, notices that despite the many successes of the EU, its citizens do not feel an emotional bond with it (Giddens 2014, 147-216). Will the vision of the European patriotism, suggested by Winston Churchill, never materialise? Or perhaps this new patriotism cannot exist in any broader, supra-national and supra-state, dimension? And if it did, what would its meaning be?

Most probably, it should be addressed to some transboundary/cross-border homeland made of traditions, customs, and the values inspiring them. This means it would produce a form of a universal culture. However, the questions arises about the canon of values which that universal culture would be build upon. For centuries, the canon for the European culture was determined by Christian values with the main principle of the love of neighbour. As the modern Europe gradually loses understanding of its cultural roots and does not wish to remember them, the words from the Preamble to the *EU Charter of Fundamental Rights* (Nice December 7th, 2000) about universal values such as human dignity, freedom, equality and solidarity must sound unclear for its members (similarly, the term "person" inspires doubt). It should be remembered, that each of these values mentioned in the *Charter* has its historical sources in the Christian concept of the human. What is the spiritual home of a modern European to be like if these main forces in the process of education to values: the Church, nation, family, are losing in importance?

2. Virtue of Patriotism

According to classical ethics[6], patriotism is considered as moral fitness and belongs to one of the four cardinal virtues. In the historical perspective, teaching about the cardinal virtues was the earliest education in pedagogy. It arose from the theoretical reflection on the existence and especially, metaphysical anthropology (Aristotle 1999, Krąpiec 1983; Krąpiec 2000; Jaroszyński and Anderson 2003). Like the whole sphere of human physical, emotional and intellectual life, human activity, conscious and voluntary, must develop. The ability to act independently was thus considered by the classics as the main aim of education. All the aspects of moral fitness were geared to promote the objective good of a person and the ability to manage one's feelings. The four cardinal virtues (temperance, fortitude, prudence and justice) represent the foundation of natural morality: they can be practised by anyone. It should be added that social engagement, including the civic attitudes, is perceived in classical philosophy as the outcome of this process of formation.

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[6] I use the word "classical" with reference to the philosophy of Antiquity and Scholasticism (mainly to the texts of Plato, Aristotle, Thomas Aquinas) and neo-Thomism (e.g. the Polish School of Classical Philosophy). In this sense I use the terms "classical ethics", "classical anthropology", "classical metaphysics", "classical philosophy" or "classics". The ethics of the American philosopher Alasdair MacIntyre is close to this understanding.

Patriotism understood as a virtue is composed of 3 elements: psychical love (patriotic feelings), justice and reverence, understood not only as respect but mainly as service (Woroniecki 1986, vol. II-2, 123). It should be noted that classical anthropology understands the human being as composed of the body and soul. Although virtue is spiritual, it integrates the action of man as a whole and materializes in human attitudes, e.g. to the homeland. Therefore, these three elements mentioned above are considered to be the virtue of patriotism. I will discuss each of them separately.

2.1. Psychical Love (Patriotic Feelings)

As I noted in my other article on patriotism, the patriotic attitude, like other moral attitudes, involves the stirring of the senses, i.e., feelings (Boużyk 2017, 199). This component plays such an important part in patriotism that we not only speak about patriotic feelings but, especially in the Anglo-Saxon literature, patriotism is defined as a feeling (Heywood 2007, 176). However, each of the elements of moral fitness, and patriotism is one, according to classical ethics, arises from the spirit of freedom, which comes to life as a result of "work with feelings". The sphere of feelings is indeed considerable in patriotic attitudes. It was very well described by Clive S. Lewis in his book *The Four Loves* as a kind of love which may be called love of "what is mine" or a specific kind of familiarity (Lewis 1993, 33-43). As I wrote in my article mentioned above: "The author meant the emotional bond not only with the home but with all that is near it and what we treat as an inalienable part of our existence in the world. We experience this, e.g., with respect to our neighbours, well known views, smells, and tastes, a certain lifestyle, or the local dialect. It is also inspired by the imagination-stimulating stories about the old days. It may be assumed that this is a sensual affection to territorially, culturally, and temporarily "extended" home. Lewis understood the importance of this feeling for shaping the pro-social attitudes, i.e., extending the sphere of family egoism. However, he warned that left to itself without a context, it may become an object of ideological manipulation and mutate into, as he called it, the "demon of patriotism". He included in the latter: nationalism, imperialism, and colonialism" (Boużyk 2017, 200-201). Similar comments are made by McIntyre, who notes that patriotism cannot be confused with a mindless loyalty to one's own particular nation and points out that patriotism is, to some extent, a morally dangerous phenomenon (MacIntyre 1984, 4, 15-16).

Thus, in order to manage patriotic feelings correctly, it is necessary to understand the objective personal good (*bonum honestum*). This idea can be found in classical ethics defining the essence of education as teaching to manage one's feelings so that we should control them rather than they should control us (Woroniecki 1986, vol. II-2, 123; Bocheński 1989, 11, 23-29). It is significant that John Paul II, when it comes to the problem of patriotism, first explained the essence of freedom and love as attitudes that are embodied in virtues (John Paul II 2005,

47-49). Another important claim in this classical anthropology is the possibility to develop love in a person: moving from egoistic attitudes to the recognition of the importance of shared causes (this process may be reflected in patriotic attitudes). According to the Pope, the modern ideologies of individualism and utilitarianism hinder the development of authentic love, including patriotism (John Paul II 2005, 44-46). This is because they change the hierarchy of goods: *bonum utile* and *bonum delectabile* precede *bonum honestum*. Liberal morality, referring to MacIntyre, tends towards the dissolution of social bonds (MacIntyre 1984, 10).

2.2. Justice (*iustitia legalis*)

It is necessary to note that the virtue of justice, and patriotism as a part of it, concerns human relations. Whereas other cardinal virtues: temperance, fortitude, and prudence are related to our own needs, justice concerns our obligations towards the others (Gilson1952; Thomas Aquinas 1981; Woroniecki 1986; Jaroszyński and Anderson 2003). It is the permanent readiness (improvement) of the human will to take into consideration the rights of other people or social groups. Patriotism is the central part of the virtue of justice, so-called *iustitia legalis* (the common/general/ social form of justice), which is responsible for making our will (note: not feelings!) sensitive to our social duties. Bocheński points out that a good patriot is not the one who has the hottest feelings, but who has the strong will to perform a patriotic duty (Bocheński 1989, 11). Such an interpretation of patriotism is a logical consequence of the concept of *iustitia legalis*. This form of justice is defined as a co-operation of the members of the community for the common good and is the most perfect model of a moral life "above which there is nothing in the natural life and in the supernatural life only the Christian love" (Woroniecki 1986, vol. II-2, 76).

It should be also stressed that the virtue of justice (and thus patriotism) requires at least elementary moral integrity. There is no just action without courage, moderation without prudence, and there are no patriotic attitudes without the ability to control the basic drives and shaping just moral conscience. True patriotism requires work on self-improvement and thus helps to make a human being more aware of own value as a person (Boużyk 2017, 203). So, being a patriot is inalienably connected with work on one's own character based on understanding the objective good of man. Consequently, patriotism interpreted in this way cannot be linked to totalitarian regimes, because under these regimes an individual is subordinate to the community. There is always the danger of misuse of patriotism for political purposes. So did the communist authorities in Poland (Korkuć 2006, 177-198, Matyja 2006, 232-253). Nazism, nationalism and imperialist ideologies, creating a kind of mythology of some nations and cultures, also soiled the very idea of patriotism. Therefore, it is important to distinguish what patriotism is and what it is not.

It is crucial for this work is to consider the ontic basis of patriotism as a moral value. It requires, on the one hand, objective knowledge about the value of human

being and the meaning of human life, and, on the other hand, the explanation of the very notion of homeland. According to Woroniecki, Bocheński and John Paul II, homeland is a complex being. Using the terms of classical metaphysics, there are two kinds of elements in it: a material element (i.e. land, statehood, history, people, and above all, culture) and a formal one (i.e. that someone is and that he/she is who he/she is) which "binds" that material element in one entity and imposes a moral obligation. In other words, the material element of homeland (as a being) must be considered as the source of man's physical and spiritual existence (Bocheński 1989, 9). One should recall here John Paul II's reflection about the definition of homeland understood as heritage of one's ancestors, namely a set of material and spiritual goods developed by men at a certain territory and in a certain time. The depositor and transferor of the values is the nation: in social relations (within the nation) man is born for his personal human life (John Paul II 2005, 66-67). To this national community (to the past and the future generations as well) man has patriotic responsibilities. The nation is a natural community, not conventional. Therefore, it cannot be replaced by a state or international organization (John Paul II 2005, 74).

Let us remember, that according to classical philosophy the nation as a being does not exist by itself, but it is formed by individuals who build a community through their efforts, particularly – through moral acts (Maritain 1951, Krąpiec 1998). Since integral human development involves moral maturity, one needs to know the values and patterns of moral conduct, i.e. national culture. No family, municipality, district or even Europe have such an impact on human spiritual development as native culture (Bocheński 1989, 14). Therefore, the homeland in the strict sense of the word is a particular national culture: customs, morals and values. As Bocheński noted in his treatise on patriotism, which he wrote during World War II, it is not enough to define the homeland by the factor of citizenship or race (Bocheński 1989, 9-10). The current difficulties in European integration confirm the importance of his words. Perhaps the lack of European patriotism is a consequence of the abandonment of values by European communities in which they were rooted from their origins and which have animated their various national cultures and customs.

It should be noted here that the educational role of the state is a different issue than the role of the nation. Woroniecki clearly wrote about it. Both communities, as he pointed out, should have in mind the common good, that is to create for each of its members a possibility of a good and virtuous life. The difference, however, is that while the state cares for the common good through the law, the nation has an influence on shaping the character of the community members. Without this, the influence the common good can never be accomplished at all (Woroniecki 2004, 22-23). Thus, the function of the nation is more basic, but statehood is a great good for every nation (Woroniecki 2004, 43, 49). Consequently, creating a multinational community takes time and prudence. Attention should be focused on man and his moral development. Too violent integration processes can cause axiological

confusion among members of the community. According to Woroniecki, if the laws are too uniform, the customs of different nations would suffer; if, however, the uniformity of laws gives way to the diversity of customs, the internal unity of the state will collapse (Woroniecki 2004, 54). Let us add that integration, which is based on moral relativism hidden under the formula of tolerance, is apparent.

Finally, let us present one more Bocheński's interesting remark which concerns the issue of homeland. Namely, a given homeland is a contingent being and therefore limited in time (Bocheński 1989, 14). At some historical moment, it may be replaced by another form of social life. One may wonder whether globalization processes are the opportunity to launch such changes. Evaluation must come from ethics: does it respect human dignity? The transnational structures that are emerging in the world after World War II are not necessarily a threat to homelands and nations. This is confirmed by the experience of Europe in conducting integration processes and was underlined by John Paul II saying that the nations of Europe (as opposed to e.g. the African peoples) have a strong sense of self-identity (John Paul II 2005, 74).

2.3. Piety (*pietas*)

Analysing patriotism in a moral perspective also gives the possibility to recognize patriotic acts. As I noted in my, already mentioned, article: "The fact that owing to one's abilities and knowledge one does a service to one's homeland does not make one a patriot. Using the language of classical philosophy, it may be said that such people create high-quality works. Patriotism, however, is included in the concept of morality, the subject of which is not the quality of the work produced: it is oriented towards the good of man understood as a person." (Boużyk 2017, 206). This claim is justified in classical philosophy which distinguishes moral actions from creative work (Krąpiec 1983; Krąpiec 1993). In the light of this distinction, as I stated: "an immoral person may be a great author, but never a patriot. This should be borne in mind, for in the modern canon of values the main stress is placed on knowledge, education, practical skills, creativity. All those, albeit valuable in themselves, have to be integrated with the moral life of man so in each concrete cognitive and creative situation the moral context has to be identified" (Boużyk 2017, 206).

The love of homeland requires learning about native culture and living according to values fundamental to it as well. As MacIntyre states: "A national community, for example, which systematically disowned its own true history or substituted a largely fictitious history for it or a national community in which the bonds deriving from history were in no way the real bonds of the community (having been replaced for example by the bonds of reciprocal self-interest) would be one towards which patriotism would be – from any point of view – an irrational attitude" (MacIntyre 1984, 16).

The result of the effort to cultivate national values is to create a specific national character. Customs provide important support to this process. According

to Woroniecki, acceptance of customs (tradition), unless they violate the good of man as man, is important for moral development, because they give a practical interpretation of moral principles. Forcing and encouraging the abandonment of tradition exposes the average person to axiological confusion (Woroniecki 2004, 56-57). As nations differ in their customs, Woroniecki advised prudence in interfering in national customs during the integration processes. However, he warns against slavish adherence to customs. In moral life, man should consider the changes that take place in culture and society. Thus, rigid attachment to customs can be malignant to his moral life (Woroniecki 1986, vol. 1, 244).

I will also add that no service rendered to homeland can be understood as a form of slavery and be a result of manipulation to perform an activity, yet it should be remembered that it is still a duty. This duty is the outcome of the actual relation determining the existence of man, expressed in metaphysics as contingency. Namely, man owes his life to God, parents, and the community in which he has been raised. Reflecting this truth, classical ethics connects the virtue of justice with the related ones: faith and piety (Thomas Aquinas 1981, Sth, 2-2, 101, 1). The former makes one able to worship God, the latter – to revere parents, a family and homeland. Thomas Aquinas noted that piety refers to homeland as one of the foundations of human existence and the good of all countrymen. Thus piety is a tribute paid to the community in which one was raised and to which one owes his physical and spiritual shape: without the customs created by a larger community, family itself would not be able to produce advanced physical, mental and moral development of man; it would merely help to survive and satisfy the most primitive physical needs (Woroniecki 1986, vol. II-2, 125; see also MacIntyre 1984, 10).

Piety is expressed in the work for the existence and good of the homeland, e.g. in political, economic or military activity. Since one is part of one's homeland, one cannot treat it as a contractor (Bocheński 1989, 11). The specific feature of patriotism as a part of *iustitia legalis* is the disproportion between our possibilities and the reverence which we should manifest (Woroniecki 1986, vol. II-2, 76). In the case of patriotism it is the reverence for homeland. Hence, there is no single measure for patriotism. The most important are the individual efforts and care taken by everyone according to their abilities. Since piety should be altruistic, they should be based on one's internal freedom developed through the effort of shaping one's own character (Boużyk 2017, 204).

Christianity gives us one more interesting clue to the issue of patriotism. It is about homeland as a tool and a reflection of God's glory in the world. A man should praise God in all that is good and beautiful, including national cultures. Therefore, the love of the homeland is not only moral righteousness, but essentially – the love of God. Therefore, treason is not only dishonesty and meanness, but also a sin. Patriotism belongs to the fourth commandment of the Decalogue (John Paul II 2005, 71). The Pope points out that thanks to Christ the concept of homeland was opened towards eschatology and eternity. The eschatological perspective shows

that human life makes sense and that there is a sense of the history of nations, even of the painful and shameful one (John Paul II 2005, 80). The Pope perceives evil not only as an ontological lack of good, but as something finally overcome by good, due to redemption. He claimed that man working with the Creator is involved in building a civilization of love and that patriotism also works for it. The possessed virtues, including patriotism, make this process more effective and in this way have an impact on social morality and thus become an important factor shaping social relations.

It should be remembered that although by serving a homeland one serves God, the love of homeland cannot be combined with hatred for other cultures and nations and it cannot violate universal justice to which every man has the right. The multiplicity of nations and cultures are the sign of God Almighty. Each homeland usually is a part of a larger cultural community, e.g. Polish culture came into existence as a part of Christian culture and without this relation it loses its *raison d'être* (Bocheński 1989, 12). Despite this dependence, the impact of native culture on man is stronger than the impact of broader communities. Hence the primacy of love of homeland over other objects of love. One should not only confess to one's homeland but also lives according to the values one's national culture. Today managing integration processes requires to take into account this dependence.

Conclusion

To sum up, the virtue of patriotism is a character trait and expresses the moral perfection of man. Like every virtue it requires development, for which both man and community are responsible. Let us remember that Pope John Paul II entrusted shaping patriotic attitudes to, i.e., the academic milieu. Education to patriotism, as understood by classical philosophy, should form a person in three aspects: psychical love (patriotic feelings), service (reverence for the community in which one has been raised and whose customs one has adopted as a basis for one's spiritual life) and common justice (making one prefer the good of the homeland over one's own). Patriotism understood as a virtue assumes the claims of human contingency, potentiality, and uniqueness of every man: patriotism is personified in man's individual attitudes towards his homeland. Like any other virtue, patriotism is based on freedom specific for man understood as a rational being. At the same time, it serves to protect this freedom, especially in its internal dimension. All the virtues have social significance and an impact on the culture of social life (classical ethics does not distinguish between social and individual virtues). Thus patriotism cannot be separated from someone's moral integrity. It should be also said that according to the theory of patriotic education, aimed at abandoning selfish attitudes for the benefit of the selfless love of the homeland, it is important to understand the ontic relation connecting man with his homeland and its objective value in his life.

Finally, I would like to return to the issues raised in Part 1 of the article and show, in the light of what has been established above, the direction in which one should look for the formula of modern patriotism.

Firstly, having recognised the moral dimension of patriotism, we face the need to evaluate globalization from the perspective of human development, which involves taking into account a cultural factor besides the economic and civilizational ones (Martin and Schumann 1999, 8; Krąpiec, 2004). The need of globalisation with a human face, i.e., based on the good of the individual, was repeatedly mentioned by John Paul II, e.g., when he presented the picture of "our generation" in the encyclical *Dives in misericordia* (10-12) or wrote about the value of work in the encyclical *Laborem exercens* (7-10). There are also some contemporary researchers who, using the so-called theory of sustainable development, demand that the globalisation processes should be humanised. For that reason the formula of cultural patriotism, i.e., one clearly relating to moral values, need not be necessarily treated as outdated, as it may foster the cohesion of a given society and consolidate its normative resources.

Secondly, when reflecting on modern patriotism it is worth remembering that national identity is an important part of the cultural formation of an individual. For that reason, Giddens' postulate of cosmopolitanism should be considered as controversial, to say the least. Let us bear in mind how important it is which model of humanism is used in shaping the pro-social attitudes for it determines the understanding of human freedom and society. For that reason, when thinking about the way of forming prosocial attitudes we must first of all determine through philosophical reflection whether society is an ontic necessity in human life (Krąpiec 1993; Krąpiec 2004; Grzybowski 2016) and whether the forms of society such as a nation and state ensure an optimal personal development of an individual (Woroniecki 1986, vol. 1, 186-204).

Thirdly, when we consider which of the two formulas of patriotism is right, hence when we choose between national and transnational patriotism, it is necessary to look for the compatibility between the goals of the nation, state and objective personal goals. It may turn out that patriotism directed at national culture is not in contradiction to the tendencies for integration of nations and effectively works for the benefit of man as an individual.

Fourthly, since classical ethics perceives in patriotic attitudes an opportunity for transgressing the natural family or tribal bonds, and hence for "extending" in man the scope of love, the idea of local patriotism need not contradict, but may even provide an opportunity to foster patriotism which refers to national culture (homeland is mainly tantamount with the shared values).

Summing up, a philosophical reflection on the moral dimension of patriotism can provide the basis for dispelling doubts that patriotism currently inspires in connection with the political, social, and cultural changes happening today. My analysis has shown that it should be considered as an important universal value

and that the practical formula of its implementation, which is discussed in Part 1 the article, should not be predetermined. Modern patriotism may have a cultural and national character and not contradict the process of globalisation, of course if the latter implements the model of humanism aimed at an integral development of man.

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POST-COMMUNISM, LIBERALISM AND SOLIDARITY IN THE COUNTRIES OF CENTRAL AND EASTERN EUROPE AFTER 1989

Abstract

The main aim of this article is to analyze the transition from communism to post-communism in the Eastern Bloc countries after 1989. Post-communism in Central and Eastern Europe gradually transformed into various forms of democracy. The political project implemented in post-communist societies is a selective kind of liberalism, which entailed a number of negative consequences. Unfortunately, in the process of transition from post-communism to liberal democracy, a very small role was played by the category of solidarity as an important virtue of social life. We need today a global expansion of solidarity as a new worldwide ethos.

Keywords: post-communism, communism, liberalism, solidarity, ethics of solidarity, human rights, *homo sovieticus*, ethics of post-communism

POSTKOMUNIZM, LIBERALIZM I SOLIDARNOŚĆ
W KRAJACH EUROPY ŚRODKOWEJ I WSCHODNIEJ PO 1989 ROKU

Abstrakt

Głównym celem artykułu jest analiza przejścia od komunizmu do postkomunizmu w krajach Bloku Wschodniego po 1989 roku. Postkomunizm w Europie Środkowej i Wschodniej przekształcił się stopniowo w różne formy demokracji liberalnej. Projekt polityczny realizowany w społeczeństwach postkomunistycznych jest liberalizmem selektywnym, który doprowadził do wielu negatywnych konsekwencji. Niestety, w procesie przejścia od postkomunizmu do demokracji niewielką rolę odegrała kategoria solidarności jako ważna cnota życia społecznego. Potrzeba dzisiaj globalnej ekspansji solidarności jako nowego światowego etosu.

Słowa kluczowe: postkomunizm, komunizm, liberalizm, solidarność, etyka solidarności, prawa człowieka, *homo sovieticus*, etyka postkomunizmu

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INTRODUCTION

The year 2017 marked the 100th anniversary of the outbreak of the February Revolution in Tsarist Russia and the bloody seizure of power by the Bolsheviks that followed, commonly referred to as the October Revolution. The communist regime which emerged in 1917, subsequently spread from Soviet Russia all over the world (Ascher 2014; Ryan 2012; *The Russian Revolution* 2006; Pipes 1990). The system turned out to be the most barbarian and murderous of all totalitarian regimes in human history. The authors of a very important historical study entitled *The Black Book of Communism*, first published in French in 1997, have documented 100 million victims of the communist terror all over the world (*The Black Book of Communism* 1999).

Today, communist parties in countries like China, Vietnam, North Korea or Cuba still effectively maintain their dictatorship power and keep violating fundamental human rights. In the countries of Central and Eastern Europe, previously forming part of the Warsaw Pact and subordinated to the Soviet Union since 1945, a systemic transformation has continued for the past several decades, consisting in a painstaking removal of the negative consequences of communism, healing the wounds caused by atrocities perpetrated in the past, and building a new democratic society.

Unfortunately, the 100th anniversary of the emergence of communism in the world did not prompt any new scientific studies that would contribute to a better understanding of the nature and consequences of this barbarian system which enslaved millions of people. It is particularly thought-provoking and sad that hardly any in-depth philosophical, anthropological or ethical analyses have been undertaken to uncover the darkest aspects of the communist regime and the deepest-reaching evil roots of the system. This painful silence of politicians, philosophers, ethicists, journalists and the public opinion is a global phenomenon, in fact – not only in Western Europe, the Americas or Asia, but even in countries like the Czech Republic, Slovakia or Poland no inspiring or revealing analyses of communism can be found today, performed at the level of the history of ideas (*Post-Communism from Within* 2013; Williams 2013; Besançon 2007).

1. FROM COMMUNISM TO POST-COMMUNISM

The partially free parliamentary elections held in Poland on June 4, 1989 may be treated as a symbolic date beginning the transition from communism to post-communism in Eastern Bloc countries. In 1989, Central and Eastern Europe witnessed the emergence of post-communism, which then gradually transformed over the years into various forms of liberal democracy (Strada 2011; Kenney 2003; Argentieri 1994). The transition from communism to post-communism in Eastern Bloc countries, and then from post-communism to democracy, has not been

a homogenous process, and its intensity has differed as well. Consequently, we may speak of various speeds at which the phenomenon has developed.

It should be emphasized that nowadays countries like Russia, Moldova, Belarus, or Ukraine were at a different stage of parting with communism and post-communism than countries like the Czech Republic, Poland, Hungry or Slovakia (Bunce and Gallo 2002; Holc 1997). An interesting intellectual event, analysing the processes of systemic transformation in ex-Eastern Bloc countries and reflecting its diversity, was, among others, the international conference on "Post-Communism and Identities: East-European Perspectives", held at the University of Padua, Italy, on June 4–5, 2015.

During the symposium, speakers from many different countries analysed the nature of the systemic transformation in Central and Eastern Europe after 1989, paying special attention to the historical and cultural aspects of the process which were common to all countries, as well as to those which were distinctive and typical for each ex-Eastern Bloc country. As far as books are concerned, one that stands out among those recently published on the topic is a study by Marta Rabikowska of the University of Hertfordshire in Great Britain, who analyses the transition from communism to post-communism from the everyday perspective of ordinary people. Her book, published in 2013, is entitled *The Everyday of Memory. Between Communism and Post-Communism.*

This book explores manifestations of the communist past in the everyday lives of post-communist societies today. Representing a wide range of disciplines including cultural studies, film studies, urban studies, sociology, media, literature and art, the contributors to this book question the myth of a homogeneous Eastern European identity. At the same time, they insist that those who experienced communism have a "right to remember", and that their memories offer an alternative to the project of globalizing capitalism. The volume presents a critique of the current withdrawal of Eastern European politics from discussion of the communist past, in which the latter tends to be regarded as an obstacle to the neoliberal transition to democracy.

As the book's microstudies of the everyday life of memory show, communism has never been isolated from its capitalist nemesis: the two systems have been intertwined in the post-Enlightenment interplay of the humanist ideals that underpin the modernist project. Through a close observation of the unconstrained ways in which memory works, this book offers an insight into the paradoxes of the two ideological powers which posited the subservient *homo sovieticus* against the civilized *homo economicus*. The book also invites debate about the contemporary relevance of the ideological polarization of communism and capitalism (Rabikowska 2013).

One of the first books on post-communism was published in 1997 by the Australian-British political scientist Leslie Holmes under the title *Post-Communism: An Introduction* (Holmes 1997). This inspiring publication depicts

the positive and negative aspects of the phenomenon in its political, economic and social dimension. Among the few Polish scholars studying the phenomenon of post-communism is the well-known sociologist Jadwiga Staniszkis, a long-standing collaborator of Warsaw University. Her book entitled *Post-Communism. An Attempt at Description*, published in 2001, introduced the category of post-communism into the public discourse in Poland (Staniszkis 2001).

Staniszkis promoted this notion to the rank of a scientific concept, listed among such categories as totalitarianism, modernisation, secularisation, globalisation, or capitalism. The reconstruction of the phenomenon of post-communism presented in her book will most likely become part of the history of social sciences. How should post-communism be defined, then? What is its essence? How should this phenomenon be analysed today? Staniszkis says that one of the main elements in the transition from communism to post-communism is a radical shift in the understanding of public authority.

"One of the most fascinating phenomena in post-communist countries – writes Jadwiga Staniszkis – is the particular demise of the state. This process of decline consists not so much in the atrophy of the form itself (for, indeed, it even tends to expand), but rather in a radical shift in rationality. By the shift in rationality I mean the eclipse of that which in Weber's concept of modern state, prevailing in social studies, represented its very essence. Namely, the end of the state as a hierarchically organized structure of procedures serving the best interests of all, based on formal rationality, homogenous in its logic and standards. According to Max Weber, it is precisely this kind of procedural rationality that represented the distinguishing factor of the modern state, next to the monopoly – also declining nowadays – of the legitimate use of physical force within the state's own territory, its sole representation of the society on the outside, and subordination only to its own legislation" (Staniszkis 2000, 4).

In post-communist countries, the political institutions typical of democracy do not represent the main centres of power. To a degree, ex-Eastern Bloc societies have experienced a depoliticisation of public life. The main mechanism responsible for the decline of the traditionally understood state in post-communist countries is the legacy of communism and globalisation. In Central and East European countries, one additional factor is integration with the structures of the European Union, which – though in a different way than the legacy of communism and globalisation – also corrodes the institution of territorial state. Consequently, "cobweb states", or "network states" have developed in ex-Eastern Bloc territories, in which no transparent political structure of centrally administered democratic power is possible.

After 1989, a de-centralisation of state power has taken place in post-communist countries. What does this mean? Staniszkis believes that an empty space has appeared in the place of a distinct centre, such as would be capable of managing the entire organism of the state. Consequently, the state is no longer the locus of trust or the point of reference for individual social or economic decisions.

Thus, the post-communist era in ex-Eastern Bloc countries has combined with a number of pathologies: the birth of oligarchy, the emergence of organised economic crime, scandals around reprivatisation, lack of de-communisation, the pillaging of public property, corruption, violation of fundamental principles of social justice, etc.

Staniszkis says that post-communism never created a permanent institutional whole, and was not able to get Poland or other Central and East European countries out of their peripherality. Post-Communist players have proved utterly weak in competition with global economic entities. Consequently, ex-Eastern Bloc countries have remained on the peripheries of the Western world.

2. The End of History?

In 2009, Sergei Prozorov of the University of Helsinki, Finland, published a very interesting book entitled *The Ethics of Post-Communism. History and Social Praxis in Russia* (Prozorov 2009). In the book, he performs a radical re-interpretation of contemporary Russian politics using the categories of the Italian philosopher Giorgio Agamben, who talks about the interpretation of history, the meaning of the past, the Messianic time, "the time that is left" – stretching from the first coming of Jesus Christ to the earth and the end of human history, when the work of redemption will be completed (Agamben 2005).

Prozorov, referring to the philosophy of Georg Wilhelm Hegel and Alexandre Kojève, reconstructs Agamben's notion of the "end of history" and uses it in his description of post-communist Russia as a post-historical territory, where no teleological dimension of politics and communal life exists. Prozorov's comments concerning Russia are also relevant, to varying degrees, for other ex-Eastern Bloc countries.

It is worth noting that the author of *The Ethics of Post-Communism* questions the vision of the "end of history" presented by the American thinker Francis Fukuyama in his famous book entitled *The End of History and the Last Man*, published in 1992 (Fukuyama 1992). What was its main message? Fukuyama claims that the transformation of communism in Central and East European countries after 1989 means the death of history as understood by Hegel and Kojève – the end of the conflict of worldviews, the evaporation of ideological and axiological disputes, the ultimate victory of liberal democracy as the best form of government. Unfortunately, the American thinker was too hasty in his announcement of the global hegemony of this political concept. He forgot to mention the totalitarian systems which still survive in the world, and failed to take into account the possibility of new clashes between civilizations and military conflicts, today more and more often referred to as World War Three in episodes.

"It is hardly a coincidence – writes Sergei Prozorov – that one of the most influential theoretical responses to the demise of the Soviet Union in 1991 was the

resurgence of the Hegelo-Kojèvian thesis on the end of history, propagated most forcefully in Francis Fukuyama's seminal *The End of History and the Last Man* (1992). Even as today Fukuyama's reading of the demise of Soviet communism as a confirmation of Hegel's original announcement of the culmination of the historical process in the Napoleonic state has lost its erstwhile popularity in the Western academic discourse, it ironically remains one of the most popular works of contemporary political thought in Russia, featured as compulsory reading for most university courses in political theory. (…) The discussion of Fukuyama's thesis both in and out of Russia quickly rendered the concept of the end of history purely metaphorical, obscuring some of the most topical questions that this thematic raises" (Prozorov 2009, 3).

The author of *The Ethics of Post-Communism* is right in pointing out that Fukuyama does not explain in his analyses what communism really was, where its atrocities stemmed from, and how the transition from communism to post-communism is being accomplished. The American philosopher also fails to address the very important question about the aftermath of communism in the political, social or economic dimension. How should the communist terror be evaluated? To what extent is post-communism a stage in the transition from communism to liberal democracy? Unfortunately, Fukuyama does not ask these questions (Simoncelli 2016). Thus, Prozorov is right in claiming that the category of the "end of history" as conceived by the American thinker obscures many of the fundamental questions involved in the transformation of communism in the Soviet Union and in Central and East European countries.

According to Sergei Prozorov, one of the surprising features of the studies of Russian post-communism "is the lack of philosophical reflection on the demise of Soviet socialism and its consequences for contemporary politics in post-Soviet states. The failure of the reforms of Perestroika and the subsequent collapse of the USSR have been automatically taken to confirm the Sovietological theories of 'totalitarianism', even as these very theories have been notoriously unhelpful in both predicting and explaining the course of events in the Soviet Union since 1985. On the other hand, critical theory, from neo-Marxism to poststructuralism, has contributed very little to the analysis of post-communist transformation and has generally exhibited little interest in late- and post-Soviet politics, eager to avoid any association with the utterly discredited socialist experiment" (Prozorov 2009, 4).

The author of *The Ethics of Post-Communism* rightly points out that the tradition of civilization in Russia practically prevents it from adopting the liberal-democratic model now. By taking into account the cultural differences between ex-Eastern Bloc countries, it is easier to understand the different speeds of their systemic transformation. Prozorov argues that "the end of history" in fact consists in the exclusion of the teleological dimension from social and political life, and not – contrary to what Fukuyama claimed – the victory of a particular political concept.

According to the scholar of the University of Helsinki, "the end of history" in contemporary Russia should be understood as a profound crisis, or even demise of the state, which he describes as an empty shell with no real power or significance. The crisis witnessed in the structures of state power is related to continued withdrawal of citizens from public life, and very limited development of the civil society. Such "end of history" becomes one of the telltale images of the post-communist condition in ex-Eastern Bloc countries.

Prozorov points out that post-communist societies today have a very hard time defining their own ethos. The difficult process of systemic transformation in these countries has little to do with the triumphalist victory of liberal democracy as depicted by Fukuyama. Therefore, he argues that with respect to ex-Eastern Bloc countries, Agamben's understanding of "the end of history" is much more adequate. The Italian philosopher talks about the Messianic time and the experience of "the end of history" which we should keep interpreting most earnestly. Its essence is not the victory of any particular worldview project, but the Messianic understanding of time, and the link between "the end of history" and the profound crisis of government structures, referred to as "the end of state".

"The experience of post-communist Russian politics – writes Sergei Prozorov – characterized by the widely discussed displacement of state authority by a bureaucratic–oligarchic matrix, in which the public and the private are no longer distinct, accords with Agamben's reconstruction of the problematic of the end of history in the manner entirely opposed to Fukuyama's triumphalist liberalism, for which it is precisely the liberal (universal-homogeneous) state that fulfills the historical dialectic. On the contrary, Agamben insists that we should think the end of the state and the end of history at one and the same time [and] mobilize one against the other" (Prozorov 2009, 29).

3. From Post-Communism to Democracy

In 2003, a book entitled *Peripheral Democracy* was published in Poland by the well-known Polish sociologist and social philosopher Zdzisław Krasnodębski – Member of the eight European Parliament (Krasnodębski 2003). The analyses proposed by Krasnodębski are particularly valuable in that they emphasize a very important element in the process of transformation from post-communism to liberal democracy in ex-Eastern Bloc countries. What is the essence of his standpoint? The author of *Peripheral Democracy* claims that the liberal project implemented in post-communist countries was a selective kind of liberalism, which entailed a number of negative consequences in the political, social and economic sphere.

Zdzisław Krasnodębski points out that "post-communist countries took over certain ideas from the great wealth of liberal thought in a superficial and selective manner. In Poland, selective liberalism implemented as a model of

communal life has included a certain number of distinctive elements – the idea of moral pluralism and the neutrality of the state, the idea of fast modernization as the basic goal, distrust of and dislike for the national tradition, the prohibition of de-communization, etc. Selective liberalism proposed to privatize ethical norms and did not attach much significance to the issue of affirmatively shaping communal identity and memory" (Kobyliński 2009a, 141-142).

After 1989, in post-communist societies of Eastern and Central Europe not enough emphasis was put on democratic participation, unity and collective good, indeed, there was not enough respect for the individual and his rights. "That new political philosophy," Krasnodębski writes, "the philosophy of peripheral democracy, hampered the emergence of any rational discussion of the fundamental dilemmas facing post-communist societies of Eastern and Central Europe related to the formulation of collective goals, the role of value and ethos, the problem of collective identity, and the issue of methods and ways of overcoming the communist past" (Krasnodębski 2003, 19).

Selective liberalism has equated democracy with liberalism, and liberalism with an open society. Selective liberalism approximates a synthesis of leftist and liberal thought. Such synthesis appears also in Western countries, but there it is marginal. The Polish model of liberalism, on the other hand, is its extreme version, lacking a number of essential elements, for example the idea of justice which for Rawls is fundamental. "Selective liberalism is thus neither classical liberalism, which was never based on the idea of relativism or pluralism, nor political liberalism as understood by Rawls, where the idea of equality, justice and morality plays such an important role. For the author of *A Theory of Justice*, consent among citizens goes beyond the constitutional, purely legal framework – it is a moral consensus" (Kobyliński 2009a, 142).

Unfortunately, after 1989 the great spiritual and intellectual legacy of the „Solidarity" movement and its ethos was almost entirely disregarded. This was the case even in Poland, where the movement originated in 1980 (Kobyliński 2016a; Kobyliński 2016b). It is worth stressing here that solidarity is one of the essential virtues related to social life. It could be defined as a strong and permanent commitment to common good, that is, the good of everyone and of all, as we are all indeed responsible for everyone.

The ethics of solidarity refers to the need for respect of the human person and his or her inalienable rights. This ethical concept is founded on a personalist view of man. One of the most important theoreticians of the ethics of solidarity in Poland was Józef Tischner. He placed his deliberations on the category of solidarity in the broader context of reflections on values and the dialogic structure of human existence.

For Tischner, our world is a world of values, in which things and matters are arranged in a hierarchical order. We cannot pin down exactly what right and wrong is, we cannot set precise boundaries – but we now there is a hierarchy.

A world without values would not be our world. It is values that make us always strive at something, give us the impulse to always prioritize one thing over another. Consequently, ours is a world of a hierarchical order, and our thinking is of a preferential nature.

According to Tischner, the experience of values is "the key to ethics, which is, above all, an attempt at a theory of values. Man exists between the ideal world of powerless values and the world of deeds. In man, powerless values became reality through actions. The primary source of ethical experience is not that of values as such, but of the discovery that another man has appeared beside us. It is not values that come first, but the presence of another person. A meeting with another person is the first source of all axiological experience" (Kobyliński 2009b, 46).

Tischner was aware that solidarity did not represent a complete ethical theory, but was merely one of many ideas. It was a kind of light, an idea to be reproduced. The ethics of solidarity wants to be an ethics of conscience. It is conscience that calls us to solidarity with or for someone. Solidarity is always that of a particular community, and of dialogue. The ethics of solidarity must be an ethics of conscience. The omission of the principle of solidarity and the implementation of selective liberalism has led to a great number of negative social consequences in the process of transition from communism to post-communism, and then from post-communism to liberal democracy in ex-Eastern Bloc countries.

Conclusions

Countries of Central and Eastern Europe still largely remain an unknown land (*terra incognita*) not only for citizens of Western Europe or the inhabitants of other continents, but for one another as well. Unfortunately, researchers from ex-Eastern Bloc countries very rarely engage in historical, philosophical or cultural studies together. The flow of information between these countries is very limited, and there is little mutual interest in the social or political life of particular countries in this part of Europe. Consequently, the public in Hungry, Poland, the Czech Republic or Slovakia, for instance, know very little about the current social condition of Latvia, Lithuania, Moldova or east Ukraine.

This mutual ignorance applies particularly to the nature of the systemic transformation that occurred after 1989. The awareness of the particular character of this transition from communism to post-communism, and then from post-communism to liberal democracy in each country leaves much to be desired. We need broad interdisciplinary studies into this matter, including all countries of the ex-Eastern Bloc. Thorough analyses are necessary first of all of the different models of post-communism which developed in each of the countries in this part of Europe, and secondly of the present condition of civil societies in these countries.

It appears that in the process of transition from post-communism to liberal democracy, a very crucial role should be played by the category of solidarity as

an important virtue of social life. The ethics of solidarity built on the foundations of a personalist view of man may be an effective cure on the road to reconstruction of social ties destroyed during communism, invoking respect for every human being, and creating societies that are just and democratic. The ethics of solidarity emphasizes the meaning of community, family, religion and tradition in the life of states and nations. It also points to the need for permanent moral and religious foundations in public life.

What we certainly need today is a global expansion of solidarity as a new worldwide ethos. Solidarity is most definitely a universal category, and is one of the important answers to the crisis of today's liberal democracy. A global ethos of solidarity is the best guarantee of peace and cooperation between nations in the age of hybrid wars and World War Three in episodes. It appears that Central and East European countries are a region where the ethics of solidarity has a special role to play in the difficult process of building new societies on the debris of communism and post-communism.

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THE QUESTION CONCERNING HUMAN ACTION

Abstract

The paper presents phenomenological and hermeneutical approach of human action in 20th century. There were two important cultural phenomena in the twentieth century. On the one hand, the growing expansion of technopoly, which based its operation on instrumental rationality and therefore affected destructively the spiritual realm of man, was growing, on the other hand, there were attempts to apply to the economy humanistic and personalistic vision of management, based on axiological rationality. Studies and projects belonging to humanistic stream are based on the assumption that at turning points of history human labour became deprived of its human nature. Hermeneutical and phenomenological analysis allows to indicate the sources of this dehumanization. Phenomenological analysis has discovered that in a technopoly human being has been deprived of her/his transcendental dimension and reduced to one of the factors of production. Hermeneutical analysis has discoverd *eidos* of human action: Norwid's *church of work*, Brzozowski's *creation of will*, Teilhard de Chardin' a *holy march of mankind*, and Tymieniecka's the *human creative act*. The essence of the phenomenological approach of human action is to build a "community of work" that allows personal development through work as well as cooperation.

Keywords: phenomenology, human action, spirituality, community of work, church of work

PYTANIE O CZYN LUDZKI

Abstrakt

W artykule dokonano fenomenologicznej i hermeneutycznej analizy czynu ludzkiego. W XX wieku miały miejsce dwa ważne zjawiska kulturowe. Z jednej strony narastała ekspansja technopolu, która opierała swoją działalność na racjonalności instrumentalnej, a tym samym niszczyła duchową sferę człowieka, z drugiej podejmowano próby zastosowania w przedsiębiorstwach humanistycznej i personalistycznej wizji zarządzania, opartej na racjonalności aksjologicznej. Badania i projekty należące do nurtu humanistycznego opierają się na założeniu, że w pewnym momencie historii praca została pozbawiona ludzkiej natury. Analiza hermeneutyczna i fenomenologiczna pozwala wskazać źródła tej dehumanizacji. Analiza fenomenologiczna odkryła, że w technopolu człowiek został po-

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zbawiony swojego transcendentalnego wymiaru i zredukowany do jednego z czynników produkcji. Analiza hermeneutyczna odkryła *eidos* działania człowieka: „kościół pracy" Norwida, „kreację woli" Brzozowskiego, „święty marsz ludzkości" Teilharda de Chardin i Tymienieckiej – „ludzki akt twór-czy". Istotą fenomenologicznego podejścia do ludzkiego działania jest budowanie „wspólnoty pracy", umożliwiającej osobisty rozwój poprzez pracę i współpracę.

Słowa kluczowe: fenomenologia, czyn ludzki, duchowość, wspólnota pracy, kościół pracy

Background – Technical and Spiritual Dimension of Technopoly

Over the twentieth century, two important cultural phenomena could be observed. On one hand, we dealt with the domination of instrumental rationalization (Husserl 1965) that supported the economic development and which had a destructive effect on the human spiritual domain, while on the other hand, a vision of community based on axiological rationality emerged from technical civilization: humanization of work (Ondrack and Timperley 1982), servant leadership (Greenleaf 1991), Economy of Communion (*The Economy of Communion* 2002). Those latter ones possess a deeper dimension: a transcendental, eschatological one.

The great development of civilisation (resulting from the use of machines, automation and information technology) over two last centuries has changed the conditions of human life on the earth. Various resources created at this time made it possible to construct new social structures. However, the new global civilisation is based on the "community of machines" and "community of economic interests", and not on common values. Therefore, many people regard the so-called scientific and technical progress as a new form of constraint and humiliation (Sen 2002; Sedláček 2013).

But perhaps machines, computers and related new systems of work organization, as products of a man, are not wrong in themselves, but they are only often wrongly used by people. It should be noted that a system of work rationalization, initiated by Frederick Taylor, did not limit itself to the internal organization of the enterprise. The rules developed by him were transferred to other domains of human life. Everything remains under the influence of scientism: family life, education, entertainment, science, art. This technical rationalism was marked by great business achievements, although it led to depersonalization of human life (Postman 1993).

It seems to be also possible to provide a positive answer to the question whether technology is able to improve a man: his spirit, freedom and happiness. A man belonging to *praxis* and to *techne*, *homo faber*, feels capable of humanity. A person-creator, through the entire burden of his self strives to humanity. Intuitions about a particular and proper role of human activity in the world can be found already in Polish poet and philosopher Cyprian Kamil Norwid (1821-1883). Norwid perceived two attitudes in historical tradition: that of Prometheus,

symbolizing independent activity of a human being and of Moses, protecting *sacrum*. The Bible reminded him that work is a punishment for the original sin, from which he concluded that this punishment required redemption through love. He considered the original sin a "Fortunate gift"; because banishment from Eden made it possible to participate in the difficult work of history, brought a man to a road leading him back to paradise and enriching him, although it was not this given, existing paradise, but the paradise that was co-created through his own effort. Work became in this perspective not only a penance, but also a means to raise the fallen man. Norwid saw the road to reintegration and rehabilitation of a human being in continuation of the previous work of history, in the process consisting in ennobling physical work, removing the degrading stigma of automatism and constraint from it, making the subject of work the subject of love. The main means to redeem work through love was to be art, combining physical effort with free expression and joy of creation. Work was to be transformed into art, and art was to descent from the height to merge with "practicality" and to brighten everyday life with its light (Węcławska-Lipowicz 2017). He understood art as "a banner on the human labour tower", and saw its task in bridging the gaps between the intellectuals and working classes. For him, the idea of "art-work" was a conception of spiritually linking working classes with educated classes and creating a "church of work" (Norwid 1997, 80). Unfortunately, the creation of community in technical organization encounters various obstacles. Introduction of spirituality into technology is a difficult process, although necessary if the "church of work" is to be created (Chauhan and Das 2016, 114). This process requires a deepened reflection, also a religious one (Capra, Steindl-Rast and Matus 1991).

The 20th century also saw the rise of solutions enhancing the status of the human work. Restoration of the "work community" was observed, i.e. spontaneous, emotional devotion to common enterprise, which conceal human benefits, aspirations and values (Mitroff and Denton 1999, 85). An employee becomes a co-participant of the enterprise. The enterprise fulfils the aim of the entire community, common welfare, which consists in the development of all its members. The 20th century experienced the phenomenon of self-awareness, achieved by a working person and by working community. This phenomenon means a drive towards freedom and personal development.

1. Stanisław Brzozowski's Proto-Phenomenology of Human Action

Searching for the sense of his own existence, as well as the sense of history of human activity in the world, one cannot omit the thought of polish philosopher Stanisław Brzozowski (1878-1911). Brzozowski was an influential critic of Polish social and philosophical thought and a piercing observer of Polish and European everyday life (Walicki 1989). In his "philosophy of work", he explores a concept of work which touches certain themes which are important for phenomenological

praxeology and offers some interesting parallels with the contemporary searching of the good entrepreneurship (Bombała 2014).

While treating work as relationship between a human being and the nature, Brzozowski emphasized that this was a relationship of fight, in which a man did not remain passive, but revealed great activity, necessary for his existence. Initially, he emphasized directly productive work, and a technological factor –power and efficient operation of artificial environment, created by people and determining their position in the fight against nature. He wrote: *Nature, as an idea, is an experience thought of as our work; the world – as a possible subject of our technical activity*. The world is not directly given to us; the world known to us, the world within the human experience is our own creation. Its order and rights are products of human activity, human work and manufacturing technology.

Later on, he focused on subjective factors of work; on the quality of human will and on cohesion and strength of live social bond determining this quality. He thought that examination of work from the perspective of experience acquired in the process of its performance, or its "internal" analysis, made it possible to prove that the ultimate basis of work and its products arising in human awareness as "objectively" given world, was subjective physical effort, maintained by the strength of human will. This effort, its appropriate level and progress, depends on other forms of labour, creating proper organization and culture of societies: *work, its quality, amount, it is a subtle creation of will, maintained by entire customs, which in turn is a very subtle and complicated creation.*

Brzozowski reaches the conclusion that an essential condition of the discipline of will is a strong, traditional moral bond. This results in recognizing religion as a valuable school of will and a precious element of intense social bond:

> "Religion is a method of extracting force from those depths of creativity that do not come out to us in any forms of activity available to our consciousness and our purposeful will. If life ceases to be enough to us, as a created form,, we have to resort to that life which is our meaningful, own creation, supporting us and our world. (...) A social, rationalized person, appeals at this point to the person of unexhausted creative possibilities. (...) A sacramental religious system seems to be a system of action by means of which we maintain on the surface of our consciousness, our will, those forces that are not covered by it, that are deeper than it, and therefore not existing for it, since they go beyond it. (...) Thus religion becomes not a concept, but a significant, deep historical reality, since it blends so strongly with deep and source will (....) We understand that the fight with supernaturalism is only an impoverishment of our creative nature down to the limits of our created and controlled life" (Brzozowski 1990, 447-449).

The essence of work is therefore the inner life of a human being, spirituality, "willingness to work", although strongly rooted in customs, in culture. This emphasis on roots indicates that community is of crucial importance for work

continuity. However, another view on work is commonly accepted, according to which work is an effort changing something in a purposeful way in the external world. Brzozowski considered this common view naive and superficial. He stated the failure to understand the nature of work is *the sickest point of modern thought*. Work is still analysed "from the outside", and not "from the inside" as certain continuous and autonomous creation. This is where the common faith in technical development is derived from, faith that in the course of time the work will become lighter, more attractive and reduced to minimum. Brzozowski warns us that this is not a good way to liberate work:

> "First of all, it should be remembered that even if technical improvements made work extremely easier (...), mankind would not cease to be its own work, painfully maintained against the elements, since beside these elements that technology is fighting with, we deal with an element that is more imminent and more dangerous, with ourselves, with life (...). The more independent a human being is from the pressure of destitution, the more important is the role and the need for internal heroism, fortitude, securing the existence of biological basis for all other achievements. Therefore, the issue of liberating work consists in, firstly, understanding which psychic forces are used to produce this sum of will that creates today's manufacturing and secures transfer to our offspring of those features that help this will to be still produced; and secondly, realizing how those mental powers can and may be transformed, so as the same or a larger sum of will and energy would be produced without the participation of any upper hierarchy over the working class exploiting it" (Brzozowski 1990, 332).

Accomplishment of real reforms, in Brzozowski's opinion, will be possible when the society frees itself from intellectual individualism. He regarded hegemony of intelligence in social awareness as pathology, leading to deprivation of the society of its "own" specified legal and moral awareness. In his opinion, intellectuals were responsible for alienation of work and reification of the image of the world. Reification of the image of the world, i.e. the view on the social reality as a set of "ready-made facts", governed by "objective course of affairs" beyond our control, was the creation of alienated awareness, not participating in the process of work, creation of intellectualism, i.e. of analytic and spectator attitude, describing the world from the outside.

The law, thus created, makes use of the fiction of an abstract, isolated entity. However, in Brzozowski's view, the law emerges from work experiences, and work is a social and historical process, its subject is human groups, linked through a certain system of bonds and relationships, and not ahistorical and abstractive entities. Brzozowski wanted to *make work, i.e. the only human force able to create its own freedom, the source and the aim of law, and make history an act of human will and work, and not of human ignorance, weakness and chance*. The conscious and

natural participation of a human being in the process of civilisation development will take place:

> "when the need to work and its requirements, become the subject and the content of his will, when work can freely govern itself, when a man can perform the entire vastness of work, being the condition and the basis for his growth, his life, status attained in the course of history, without any other constraints beside his own will, beside his own respect for himself (...). Therefore, revolution managed from the top is not sufficient here; internal fusion must be created, affinity between the human being and work. Work must be felt not only as a source of law, but as law itself, therefore something, of which one can be proud, which can be loved" (Brzozowski 1990, 161).

Thus, it is necessary to take a new approach towards work, and first of all, to penetrate its nature and to understand its role in the history of mankind, which is understood by Stanisław Brzozowski as the community of work.

The evolution of Brzozowski's thought can be defined as subjectivization and irrationalization of the "philosophy of work". The notion of work itself became hugely expanded; it began to indicate any effort enhancing human power. A particular role was to be played by the human mind: *Reason is work in abstraction, this is the skeleton of work, while nature is its flesh*. Three meanings of the notion of "work" can be distinguished in Brzozowski's philosophical output:

    – a narrower meaning, indicating direct material manufacturing, production;

    – a broader meaning, referring to the "organic" system of human co-operation; this is a system of various, mutually conditioning and supplementing forms of social activity (the nation is here a real community of work);

    – the third meaning, indicating the process of work depicted from the perspective of the act of will carried out in its very subject, co-forming an appropriate course of human effort, leading to achieving appropriate results (creative activity).

The subject of the description of work is therefore a process that is complex, diverse and expanding in space and time, considered in its entirety, the subject of which is a human being and human societies. The process of work carried out in time is identical to the historical process. Brzozowski claimed that work was a real, although unrealized, subject of philosophical consideration in the course of history. A proper subject of philosophical analysis of work should be an area of subjectively fulfilled acts of the working entity and of experiences emerging as their correlates. Brzozowski contrasted the common view on work with a metaphysical thesis of "co-measurability" of the world and work, the world being something "unready" and therefore subject to the creative effort of a human being. This thesis finds its full development in *Prolegomena of the philosophy of work*, where Brzozowski formulates his final definition of work:

"Work is the exchange of a certain stretch of our life for certain stable or relatively stable conditions of our further life. By using up our life, in a certain specified way, we determine, in a way consistent with our will, conditions of our further life. By determining and using up ourselves in a certain manner, we go beyond ourselves, we create something we can rely on. This is the most general property of the world for us that it is co-measurable with work: it receives it into itself, records it in itself and secures its results" (Brzozowski 1990, 224).

The analysis of Stanisław Brzozowski's legacy reveals his pioneering work in treating work as an important factor of self-cognition and self-creation, and at the same time, as the most important manifestation of human existence on the earth (which was later developed by theology of mundane realities). His claim that new systems of work organization can lead to the creation of the community of work when they fulfil certain conditions is also important. Full development of this philosophy in the sphere of *praxis* can be found today in the above mentioned concept of *servant leadership*, in its basic principles: *Listening*, *Empathy*, *Healing*, *Awareness*, *Persuasion*, *Conceptualization*, *Foresight*, *Stewardship*, *Commitment to the Growth of People* and *Building Community* (Greenleaf 1991).

2. Acts of a Human Being as Culturogenesis

Theological revalorization of work – is one of the "ideas – forces" of the work of Pierre Teilhard de Chardin (1881-1955). He attached a great importance to work, which is proved by the fact that he calls a creative act of God "God's work", and all-embracing process of changes – *the work of evolution* or *absolute work of the universe*. According to Teilhard's vision of the world, all work contributes to the growth and progress. And progress is a *holy march of mankind*, therefore human effort is also *holy*. The call for continuation of the creation work is defined by Teilhard in the following way: To act simply as God's tool, to continue the work of creation, to process the matter even visible and loved as God's work, which should be brought to the end. Matter – is the transmitter of God's action, possible to deify through exoneration and joining Corpus Christi through moral improvement and submission to the human being (Teilhard de Chardin 1984, 146).

A fundamental breakthrough made by Teilhard in theology was overcoming dualism, dichotomous division into "work for God" and "work for the world". Religious enhancing of the value of work is related to the thesis that the work of creation has not been finished yet, but it is still continuing. A human being, acting in the world according to the direction of the course of changes, unites with God in creative action and becomes His collaborator. Sacredness of human acts in this light becomes obvious. But is every human act sacral? Certainly not. Only the dynamism of a person aiming at Truth, Good or Beauty can be considered a sacral act.

The dynamism of a human being can be most fully expressed in a personalistic culture. The nature of creative work of human being has been beautifully expressed by Teilhard with the following words:

> "To create, or to organize material energy or truth, or beauty, brings with it an inner torment which raises the one who dares to face its hazards above the quiet and mundane life where egoism and attachment to the existing state of affairs prevail. To be a good workman on the Earth, one must not only surrender one's calm and peace, but must learn to continually abandon the form taken by his deliberate labour or art or thought to go in search of new forms. To stop to enjoy them, or to possess them, would be a fault against action. Over and over again one must go beyond oneself, tear oneself away from oneself (...). The more nobly a man wants and acts, the more he desires searching for great and sublime aims. He will not any longer be satisfied with his family, country and a remunerative aspect of his deeds. He will have to create wider organizations, to pave new ways, to fight for great causes, to discover unknown truths, to shape a new ideal and to defend it" (Teilhard de Chardin 1984, 318).

In this perspective, culture appears as personalization and sacralization of the human existence and the world. Culture is a dynamic relation of a man towards himself and the world, consisting in continuation of the creation work. The entire reality referring to a person is a challenge, a task, an idea. Culture constitutes a completion of this task. A person – individual and social one – is a subsistent form creating culture. Culture is a projection of a person and community. As Czesław Bartnik writes,

> "It emanates a person, an image and its «self-continuation». It is a horizon of a person, allurement into the world of ideas, perfections and a movement towards the inside of future. It is essential and existential dynamic of a human being. A man is written out into the score of time, space and subject of history. He takes place, occurs and strives all the time, until he comes into being in an optimal and absolutely final way" (Bartnik 1995, 404).

Culture is a basis and a method of self-realization of a human being. It arises from a real coming into existence of a man and his entry into the history. It is the possibility of proceeding the recovery of a human being in reality. After coming into existence and entering the course of history, a man is subject to a cultural process. Thus culture, understood as its constant "coming into being" (culturogenesis) is a consequence, a result of anthropogenesis and cosmogenesis. Therefore culture is a personalization of a human being, it is a transformation of human nature into a person and a community of people. It is a particular type of self-fulfilment, manifestation and expression of a person. The act of a person (participation in culture) is *a flash of new life, new good, as if an announcement of a new heaven and a new earth.*

3. Phenomenology of *Creative Experience* and *Creative Act of Man*

Anna-Teresa Tymieniecka (1923-2014) was a Polish and American philosopher, one of the famous phenomenologists of our time. Tymieniecka's *phenomenology of life* seems to be the culmination of reflections over the act of a person. Her concepts of *creative experience* and *creative act of man* have been considered not only as "essential factors of awareness", but also as "acts of creative making of things and beings", subjected by a human being. They are an element of a cosmological vision of the world: an attempt to reach the "heart of the matter", to understand "the leading thread" of primary creativity of the Cosmos (*Cosmic Creation*), as a result of which it assumes the form of "self-individualizing coming into being". This is expressed through a concept of "creative activity towards universal coming into being of everything" (*creative constitution*).

Other important ontological categories in her concept include: *initial spontaneity* and *inner workings,* which expose spontaneity and inner creation of the world as a whole in the dimension of its *Universe*, which includes also a human being (Szmyd 2002, 241). What becomes crucial is the place and the activity of a man in a world as a being that is fully conscious and possesses a stabilized moral awareness, which resulted in his distinguished way of existence – the being of a person. This new poetic mood vested in a human being makes it a source of regulative creative actions that are fully morally conscious. Creativity thus understood becomes a "factory" of community dimensions of human existence among other people and with other living creatures.

What is crucial here is the issue of the role and the function of creative processes in the structure of human condition – *the creative function in the human condition* (Tymieniecka 1997, 19). Its causative source in human apparatus of world perception is an analogical structure called *Imaginatio Creatrix*. Tymieniecka focused in her analyses on creativity understood as the unification and harmonization occurring within a creative experience of a man, in the context of the entire being, which she defined through the category of orchestration. In thus developed creation actions of a constitutive character prevail, attaching to a person a specific human meaning: new living phenomena are at the same time conceptualized and evaluated *(the process of valuation)*. It becomes important in the process of shaping human existence to build moral senses and his poietic actions. This concerns indicating those dimensions of human creativity which are the source and emanation of its spirituality and which maintain and constantly restructure his human nature together with the changing world.

Studies of the author of the *phenomenology of life* are concluded by a philosophical theory of life as an entirety, where the main place is occupied by a man and his *human condition*; establishing the place of a human being in unity with everything that is living, emphasizing the creative factor in human existence, and indicating the primarily meaning of this existence, its *primogenital significance*

(Tymieniecka 1997, 21). This primary meaning is revealed in art, science and philosophy. This has also a religious dimension, which combines with its possibility to transcend towards infinity. Life is understood as a never-ending entirety, full of variety of its manifestations, from the most elementary to the best organized, including highly developed "creativity of Human Spirit", the expression of which are various forms of social structuralization and the development of culture.

Tymieniecka also introduces the idea of *onto-poiesis* on a global scale, which expresses all relationships and creative effects in space, of life "working", occurring between the cosmos, life itself and culture. *Cosmos, bios and culture reveal their ontopoietic junctures within a common interplay of life*: life is a "crucial player" in a cosmic dimension, the effect of which is the incessant process of creation (Tymieniecka 2000, 41). Therefore, all-embracing creation becomes the content of the logos of the world and a man. Such a view allows for going beyond reductionism theories emerging in natural sciences, and for fully understanding the exceptional character of every element of the reality in the context of the world complexity. Processes of the self-individualization of life that overfill the world, as well as the diversity of living creatures, are given in this concept a chance of a comprehensive presentation and reasonable understanding.

Tymieniecka's *Phenomenology of life* lays out a further direction for investigations, not only for philosophical ones. Assumptions concerning the creative nature of a man and the world may provide a basis for new developments of classical problems of ontology, epistemology, axiology and anthropology, as well as of social science and management science. In this way, philosophy itself becomes a manifestation of the creative experience, going beyond its previous limits. Philosophy, thus understood, should become a stream, which constantly undergoes transformation processes and discovers new areas of phenomenological analyses, hence becoming creativity itself by its nature and providing the basis for other forms of activity. It builds human work into the *creative logos* of the world, as a fundamental sense of existence.

Conclusion

In a technopoly human being has been deprived of her/his transcendental dimension and reduced to one of the factors of production. This situation is perceived by most people as a physical problem to be resolved through technological innovation. However, phenomenologists notice also a metaphysical dimension of this crisis (Husserl 1965; Heidegger 2002). Fascination with mathematical formula, i.e. instrumental rationality, is core of the crisis that plagues the contemporary world. Absolutizing the role of mathematics in building business strategies has become one of the main determinants of economic and ecological crises. Phenomenologists are calling for a reflection and re-conceptualization of used business strategies and relationship between human beings and nature.

Phenomenology is able not only to challenge the basic conceptualization of utility in today's modern, industrialized civilization, but also to indicate the way how the existing problematic situation can be remedied. Phenomenology proposes a new approach to company management (Gill 2014; Heil 2011). In contrast to technocratic heartless attitude, phenomenology promotes the idea of human dignity as the inviolable value and suggests new understanding of business through describing company as "community of work" (Chauhan and Das 2016, 114).

Technology is used by a man to control nature. It should be also an instrument of human liberation. Technology is indeed a part of culture in which matter and spirit are united. A human being, gifted with the order embodied in the matter, unites in his actions all processes, also those that are governed by determinisms of geography, biology and economy. Related to matter, able to determine new forms of its surrounding through the gift of thinking, *homo faber et artifex*, co-creator of the world, pushes history forward. A human being is a collaborator in the work of creation and a demiurge of evolution of this work in discovering, exploitation and spiritualization of the nature. Work provides a link between a human being and the world, as well as between matter and spirit. Technology is a tool of this creative enterprise. Work – a human act – is performed by combining the effect of technology with the consciousness of the freedom of creation.

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PEDAGOGY AND SOCIOLOGY

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THE RETREATISM PROCESS OF *HIKIKOMORI* PEOPLE ON THE EXAMPLE OF 24 JAPANESE *HIKIKOMORI* CLIENTS

PROCES WYCOFANIA *HIKIKOMORICH* NA PRZYKŁADZIE 24 JAPOŃSKICH *HIKIKOMORICH*

社会的ひきこもりの逃避主義プロセス24人の日本人ひきこもりクライアント事例について

Abstract

In this publication I present a fragment of the results of my doctoral thesis, in which assuming in the sociological perspective that I am dealing with an example or a form of one of five types of adaptation to the situation of anomie named by the American sociologist Robert K. Merton: "retreatism", on the example of 24 Japanese *Hikikomori* clients, described a problem being at the center of my scientific interests - the *Shakaiteki Hikikomori* (Eng. Social Withdrawal) in Japan (i.a. the profile of *Hikikomori* person, the retreatism process of *Hikikomori* people, the socio-cultural factors favoring the retreatism option in the form of *Hikikomori* etc.) More specifically, in this publication I present the retreatism process of *Hikikomori* people.

Keywords: Sociology of social problems, Sociology of deviation, Anomie, Retreatism, *Shakaiteki Hikikomori*, Japan

Abstrakt

Publikacja niniejsza prezentuje fragment wyników badań mojej rozprawy doktorskiej, na łamach której to, przyjąwszy w perspektywie socjologicznej, że mam do czynienia z przykładem czy formą jednego z pięciu typów adaptacji do sytuacji anomii, nazwanym przez socjologa amerykańskiego Roberta K. Mertona: „wycofaniem", na przykładzie 24 *Hikikomorich* japońskich, opisałam problem będący w centrum moich zainteresowań naukowych – *Shakaiteki Hikikomori* (ang. *Social Withdrawal*) w Japonii (i.a. profil *Hikikomoriego*, proces wycofania *Hikikomorich*,

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czynniki społeczno-kulturowe sprzyjające wyborowi formy wycofania, jaką jest *Hikikomori* etc.) A dokładniej, publikacja niniejsza prezentuje proces wycofania *Hikikomorich*.

Słowa kluczowe: socjologia problemów społecznych, socjologia dewiacji, anomia, wycofanie, *Shakaiteki Hikikomori*, Japonia

要旨

　　本論文で筆者は自身の博士論文の調査結果の一部を提示している。当該博士論文において筆者は社会学的観点で引きこもり問題を、アメリカ人社会学者ロバート・K・マートンが名付けた、アノミーの適応様式の5類型中の1つである逃避主義と想定し、24人の日本人引きこもりクライアントの事例を用い、筆者の学術的関心の中心である日本における社会的引きこもり(英語：*SocialWithdrawal*)問題(引きこもりの人のプロフィール、引きこもりの逃避主義プロセス、逃避主義の発現形態として引きこもりを生じさせる社会文化的要因等)について述べた。より正確には、本論文は引きこもりの人々の逃避主義プロセスについて提示している。

　　キーワード**:**社会問題の社会学、逸脱社会学、アノミー、逃避主義、社会的ひきこもり、日本

1. The *Shakaiteki Hikikomori* Definition

The Japanese psychologist Hideaki Nishimura wrote in his book entitled: *Hikikomori Sono Shinri to Enjo* (The Psyche and Support of the *Hikikomori* People) that tendency to the ad hoc let's call it, "being outside the area of social interactions" always have been located in a canon of the most basic human behaviors. (Nishimura 2006, 3) In order to show this, he has pointed out many examples, for instance: the mythical goddess *Amaterasu Ō Mikami* hid in a grotto because her brother behaved aggressively, the *Sengoku* Period military leaders barricaded themselves in the castles because they tried to protect themselves, the Imperial Army soldiers hid on the Guam and Rubang Islands in a jungle because they tried to protect themselves, the Buddhist monks decided to live in a long-term seclusion because they wanted to achieve the enlightenment etc. (Nishimura 2006, 4) Next, he explains that the people decide to "be outside the area of social interactions" despite a fact that they are not affected by any illness, but rather just because they want to hide themselves with their pain, just because they have many, sometimes really painful experiences, just because it seems to them that, for some reason, they cannot show themselves to others etc. (Nishimura 2006, 15-16) Finally, he concludes that it is only a pattern of behavior appropriate to the situation creating a possibility of surviving. (Nishimura 2006, 5)

At the turn of the 1970s and 1980s, the Japanese (and above all the psychiatrists) began to be interested in one of the forms of "being outside the area of social interactions" characteristic for the modern times. (Shirai 2004, 112) In the early 1980s, the Japanese psychiatrist Hiroshi Inamura, in this context, began to use a term: *Shishunki Zasetu Shōkōgun* (Adolescent Setback Symptoms), to refer to the school phobia, student apathy and work phobia. At the end of the

1980s, another Japanese psychiatrist Yomishi Kasahara, in this context, began to use a term: *Taikyaku Shinkeishō* (Retreat Neurosis), to refer to the situation that for a long time, one skips school and does not take paid work. (Fogel and Kawai 2006, 1-2; Hirashima 2001, 261; Saitō 2006, 69-70) Finally, in the 1980s, currently recognized in Japan as a leading specialist in this field, the psychiatrist Tamaki Saitō began to be interested in this and, in this context, began to use a term: *Shakaiteki Hikikomori* (Social Withdrawal) (Saitō 2006; Saitō 2013).

Tamaki Saitō defined in his book written in the psychiatric perspective, and entitled: *Shakaiteki Hikikomori. Owaranai Shishunki* (The *Shakaiteki Hikikomori*. Never-ending Adolescence) a problem being at the center of my scientific interests - the *Shakaiteki Hikikomori* as follows:

> "It is a state that by the end of 20th century, became a [social - ed. K.K.] problem that comes down to that, that for the most of time, one stays at home, and for more than 6 months, it functions outside the area of social interactions. It is difficult to diagnose other psychological problems that could be its main source." (Saitō cited in Kōseirōdōshō (The Ministry of Health, Labour and Welfare), 4; Saitō 2006, 25; Saitō 2013, 24)

More precisely, one to whom it concerns resigns from the participation in the social life and in all the social activities - it does not study (in any institution), it does not work, and it limits its activity primarily to the home. (Furlong 2008, 309; Kuramoto and Ōtake 2005, 31; Miyake 2005, 26; Shiokura cited in Kaneko 2006, 233; Shwalb et al. 2010, 370; Suwa and Hara 2007, 94; Suwa and Suzuki 2013, 191; Tateno et al. 2012, 1; Teo and Graw cited in Krieg 2014, 18; Uchida 2010, 95) This is not a mental illness or disorder. Nevertheless, among those whom it concerns are the cases that are difficult to find any mental problems, as well as the cases suffering from the variety of mental illness and / or disorders that usually are secondary. (Miyake 2005, 26; Ogino 2004, 121; Suwa and Hara 2007, 94-100; Suwa and Suzuki 2013, 191, 193-194; Tanaka 2001, 37; Uchida 2010, 95)

Considering that the *Shakaiteki Hikikomori* is not a mental illness or disorder, in my opinion, it can be dressed in other scientific categories, including the sociological categories. Hence, it can be defined, for instance: as an example or a form of one of five types of adaptation to the situation of anomie named by the American sociologist Robert K. Merton: "retreatism" (Kalita and Uesugi 2009. 57-59; Kalita, "Shakaiteki Hikikomori", Kosewski 1985, 60; Merton 1938; Merton 1968; Merton 2002; Murphy and Robinson 2008, 7; Pospiszyl 2009, 31; Siemaszko 1993, 42-44).

Robert K. Merton defined retreatism as follows:

> "These are those who run their existence eating a little, sleeping a lot, and not trying to create everyday patterns of their live that they would be able to accept. Basically being passive, they run it in a corner and being alienated from the broadest social values". (Merton cited in Kosewski 1985, 60)

2. The Theoretical Basis

For the needs of my research, I assumed that the *Shakaiteki Hikikomori* is an example or a form of the retreatism because it fulfills its criteria:
1. The *Hikikomori* people reject culturally defined goals;
2. The *Hikikomori* people reject culturally sanctioned means;
3. The *Hikikomori* people for a long time, live outside the area of social interactions;
4. The *Hikikomori* people lead from the perspective of society a nonproductive life;
5. The *Hikikomori* people burden society;
6. Many of the *Hikikomori* people think about death, and some of them try to commit suicide.

Next, I briefly described the Japanese society and culture. Describing its social structure, I referred to the Japanese sociologist Kenji Hashimoto's concept of social diversity (Hashimoto 2000). While describing its cultural structure, I pointed out that the two cultural orders are overlapping each other in Japan: a tradition [In this context, I discussed problems such as: Collectivism, *Wa* (Harmony), *Uchi* & *Soto*, *Honne* (Public Expression) & *Tatemae* (Private Thoughts / Feelings), *Jōge* (Hierarchy), *On* (Social Debt) & *Giri* (Obligation), *Chū* (Loyalty) and *Menboku* (Face) that allowed me to create an idea of the cultural ideal of a Japanese person, and its desirable attributes and patterns of social behavior] and the new cultural trends [In this context, I discussed the statistical surveys of the *Tōkeisūrikenkyūsho* (The Institute of Statistical Mathematics) entitled: *Nihonjin no Kokuminsei Chōsa* (The Research on the National Character), *Kojinteki Taido* (Individual Attitudes) (Tōkeisūrikenkyūsho, n.d.)].

Finally, I divided, and described the three main areas of socialization and social activity in Japan that have an impact on the psycho-social development and human life activity:

1. The Family Environment [Problems such as: the Traditional Family, its Structure and Functions, the Contemporary Family, its Structure, Functions and Crisis, and Domestic Violence];
2. The School Environment [Problems such as: the Education System and the Phenomena Specific to It such as: Credentialism, *Esukare-ta- Shiki* (Escalator Formula), *Juken Jigoku* (Examination Hell) or *Ijime* (Bullying), and the Dark Side of Socialization Process in it and the Phenomena Specific to It such as: *Futōkō* (School Nonattendance) or Suicides];
3. The Labor Market and Work Environment [Problems such as: the Labor Market and Employment Practices in the Post-war Socio-economic Transformation Period, the Labor Market Structure, the Meaning of

Work, the Rules of Selection on the Labor Market, Women in the Labor Market, Work Culture, the *Sarari-man*'s (Salaryman's) Rhythm of Day and Life Style, the Social Costs of Work, *Pawa-Hara* (Mobbing)].

3. The Methodological Basis

While constructing my research, in order to collect the research material, I decided to choose: a qualitative methodological approach, a fieldwork research method, and a nondirective interview research technique with the dispositions that were limited to the three areas of exploration: The Family Life, The Experiences from the School, and The Experiences from the Labor Market and Workplace.

Regarding my choice of a research sample, I decided to choose a purposive sampling. Its criteria were as follows:

1. The people who ever have been / currently are *Hikikomori* people;
2. The people about whom the people and / or institutions providing help and support to the *Hikikomori* people can certify that they really have been / are *Hikikomori* people;
3. The people who are able to take part in my research - to give me an interview, and to conduct the conversations about their personal experiences. In other words, the people who already went through / are in a resocialization process who significantly improved. In order to collect the research material, I planned to conduct the interviews with 20 *Hikikomori* people. Nevertheless, I managed to conduct more of them:
1. 24 interviews with the *Hikikikomori* people - 4 women and 20 men (3 women and 19 men), between 22-45 years old (26-45 years old) (Due to the amount of research material insufficient for the analysis, I was forced to reject 2 of them);
2. In addition, 3 interviews with the mothers of *Hikikomori* people;
3. In addition, 4 interviews with the *Hikikomori* experts.
I collected the research material in 2012-2014 (I conducted the vast majority of interviews between July and September 2013), in Japan, in *Tōkyō*, in:
1. Two institutions providing help and support to the *Hikikomori* people;
2. In addition, in the virtual space. (Exchanging the e-mails, "Skype" conversations and chat room conversations).

4. The Research Results

The quintessence of the retreatism process comes down in the examined group of *Hikikomori* people to the certain number of accidents overlapping each other that became the stimulus activating and deactivating the control mechanisms (external and internal) and the retreatism mechanisms controlling the actions of a human-unit. There was a kind of decision-making process in it. In other words, its

bond with the society and outside world did not break off suddenly, but gradually, step by step (Kalita, "Shakaiteki Hikikomori", 262).

The retreatism process was divided in the examined group of *Hikikomori* people into five stages:

1. The Transitional Stage;
2. The Ascending Stage;
3. The Real Retreatism Stage;
4. The Climax Stage;
5. The Descending Stage (Kalita, "Shakaiteki Hikikomori", 262-359).

4.1. The Transitional Stage

In the Transitional Stage, the society, and hence the parents, the teachers and the closest surroundings seemed to know what is best for a human-unit. It put on it a strong pressure to achieve the culturally defined goals using the culturally sanctioned means and to respond to its expectations.

The human-unit still was a conformist. It listened to the signals coming to it from the society and outside world. Its sensitivity let it *Kūki wo Yomu* (read the atmosphere from the air). In other words, the pressure without words reached it. At the same time, it suppressed in itself its own feelings and needs. Even if it could independently make the decisions about itself and its life, it perfectly well knew what other expected from it. It owed to them the *On* and the *Giri*, and usually it chose not what it in the depths of its heart wished, but what others expected from it.

In order to deal with the social pressure, the examined Hikikomori people used different strategies.

Finally, some signals began to appear, and indicate that as a result of pressure on achieving the culturally defined goals, while there was lack of resources necessary to achieve them, the retreatism mechanisms built into it in a case of failure began to start up. It began to lose the bond with society and outside world, it began to become a retreated human-unit, it began to become a *Hikikomori* person.

The first symptoms of retreatism of the examined Hikikomori people were:
- Difficulties in carrying out even the most basic duties;
- The growing sense of being abandoned with their problems and struggles, and the growing sense of loneliness (Kalita, "Shakaiteki Hikikomori", 263-286).

4.2. The Ascending Stage

In the Ascending Stage, the protection of human-unit against destruction became a priority. The internal control mechanisms began to weaken in it in the favor of retreatism mechanisms. In turn, these turned it in the social machine into the deactivation state. It completely gave up achieving the culturally defined goals.

The examined Hikikomori people completely gave up studying at school, working, and even such prosaic activities as going to the library or to the shop.

It completely broke the bond with society and outside world and became a "man away from the society".

The examined Hikikomori people completely broke the bond even with people who for the longest time were interested in them, and their fate (Kalita, "Shakaiteki Hikikomori", 286-289).

4.3. The Real Retreatism Stage

In the Real Retreatism Stage, the human-unit had a sense of failure. The internal control mechanisms were completely deactivated in it. What is more, it itself was kept completely deactivated, and it did not achieve any culturally defined goals.

The examined Hikikomori people did not study (in any institution), and did not work.

It remained completely cut off from the society and outside world.

The examined Hikikomori people since they were afraid to meet anyone (If they did not have the good relationship with the household members - even them), as far as it is possible, usually did not leave the home. As a consequence, many of them were isolated, not only from the society and outside world, but even at home from the family.

Time stopped for it, and its psycho-social development stopped. Thus, it obtained a chance to take a rest from the pressure (external and internal).

The examined Hikikomori people:

- Were completely cut off from their previous life;

- Were subdued, sluggish, paralyzed, as if they were depressed. They lacked the energy to do anything, and even to live. It looked like a laziness, but it was not.

Nevertheless, in a sleep mode, as much as possible it tried to lead a "normal life".

The examined Hikikomori people:

- Woke up, got up, got dressed, cooked, ate, slept, filled time with something, let's call it: "pleasant", something that could be done alone, in the comfort of home, in the room, usually something like: watching television, listening to music, playing games, reading books or independent learning etc. Some of them left the home, surfed the internet, dealt with gambling, consumed stimulants (especially alcohol), dreamed etc. Nevertheless, they did not enjoy filling time this way. Rather it was just a form of escaping from the awareness of failure - they could not think about it. As one examined expert taking care of and supporting the Hikikomori people has told me: "For them, the days are very long, while the years flow quickly.";

- Many of them had a tendency to reverse day and night;

- If they already have encountered the people who tried to interact with them, sometimes they were a threat to them;

- Over the time, some of them began to have the symptoms of mental illnesses and / or disorders.

Since for a long time, it was kept in the deactivation state, in order to bring it to the order, the external control mechanisms began to be activated.

The external control mechanisms:

1. The Parents

(They went through three stages: 1. The Anger Stage, 2. The Worrying Stage, 3. The Helplessness and Hopelessness Stage);

2. The Siblings;

3. The Relatives and Neighbors.

In response to the external control mechanisms, the retreatism mechanisms intensified in it their activity. Over time, due to the lack of effectiveness, the external control mechanisms became deactivated (Kalita, "Shakaiteki Hikikomori", 289-314).

4.4. The Climax Stage

In the Climax Stage, for a long time, the retreatism mechanisms kept the control mechanisms (external and internal) and the human-unit itself deactivated. The retreatism reached an apogee.

The examined Hikikomori people:

- Could not concentrate on anything, and could not do anything;

- Could not communicate with other people. (The most drastic cases lost their speaking skills);

- Some of them were not able to step out of the home or even the room. (In the most drastic cases, in some moments, even not able to go to the bathroom or to the toilet);

- Some of them were not able to eat;

- Some of them seemed to have been mentally ill;

- It was so hard for them that often they felt that it would be better for them to die, that it would be better for them to disappear from this world;

- Some of them wanted to hurt themselves (i.a. to cut their veins etc.), and some of them really did it;

- Some of them tried to commit suicide.

It is said that, "It is necessary to fall completely to the bottom, in order to bounce off it…"

The human-unit already has somewhat rested from the pressure (external and internal) exerted on it, thus the internal control mechanisms again began to be activated in it.

The examined Hikikomori people:

- Began to have the compulsive thoughts - they wondered what washappening to them, what happened in their lives, what led them to this. They criticized themselves for "not being able to manage in the society and outside world" Because of this, they felt shame and anger. They could not accept who they became. How they lived did not seem normal to them;

- Their emotions began to explode. (Usually it meant that their condition had begun to improve, that it was a turning point);

- They realized that it can no longer be like this;

- In order to somehow get out of this, they began to make the effort.

The external control mechanisms begun to start up.

In order to somehow get out them of this, the parents of examined Hikikomori people again began to make the effort (Kalita, "Shakaiteki Hikikomori", 315-326)

4.5. The Descending Stage

In the Descending Stage, the internal control mechanisms increasingly stimulated the human-unit to re-establish the bond with society and outside world, and to return to achieving the culturally defined goals. At the same time, the retreatism mechanisms that until now protected it from the operations of control mechanisms (external and internal), as well as from the awareness of failure, weakened, and finally, became deactivated. Time again began to flow for it.

The examined Hikikomori people looked for some help. Nevertheless, their contact with the people and the institutions providing help and support to the Hikikomori people took place on the basis of trial and errors.

It re-established the bond with society and outside world, and began to desire to achieve the culturally defined goals.

The return to the society and outside world, and to achieving these goals required time - lasted / lasts years, and took / takes place step by step, in stages, in order reversed to the retreatism process.

The examined Hikikomori people:
- Had to learn to leave their home again;
- Had to learn communication again;
- Had to re-establish relationships with other people again;
- Had to learn to build, and maintain relationships with other people again;
- Finally, they began to have a need to re-establish the bond with "real society", a need to become independent, and a need to achieve the culturally defined goals.

Nevertheless, society is constructed in such a way that if one once completely gives up achieving the culturally defined goals, and completely breaks its bond with it, its re-establishment, and the return to achieving these goals becomes very difficult. Its social competences have been reduced or even lost. Until now it functioned without it. Finally, it has nowhere to come back to.

The examined Hikikomori people:
- Tried to get benefits, however since they were not sick, it was very difficult;
- Faced problems with insurance;
- Faced problems with renting a flat;
- Faced problems with finding, and doing work.

Due to the created distance, it never may join it again...

The examined Hikikomori people wished themselves a full return to the "real society" and outside world, as well as to achieving the culturally defined goals, but often ended at the stage of dreams (Kalita, "Shakaiteki Hikikomori", 326-359).

4.6. The Returns to the Retreatism

The human-unit completely or at least largely went through a resocialization process. It established the bond, if not with the "real society", at least with the "*Hikikomori* society". It, if not fully, at least partially is achieving the culturally defined goals using the culturally sanctioned means. Nevertheless, it does not feel completely happy with all of this...

- Only one examined Hikikomori person declared that it excludes a possibility of returning to the retreatism;
- Most of them declared that they do not wish it, but they cannot exclude it;
- Many of them admitted that it had already happened to them;
- 4-5 years have passed since our interviews, but in the lives of many of them nothing has changed... (Kalita, "Shakaiteki Hikikomori", 359-365).

5. The Live Story Of Yasumichi As The Example Of A *Hikikomori-Retreatism* Process Scenario

The Profile of Yasumichi

Soon Yasumichi will become 40 years old. Nevertheless, for his age, he looks, and behaves surprisingly young, like a student. He comes from a new middle class urban family. He is a son of *Sarariman* and *Shufu* (professional housewife), and a *Chōnan* (the eldest son in family) - he has a younger sister. He describes himself as a *Donkusai* (a klutz), and slightly unconventional, making bloopers, shy and obedient person who despite always being slightly outstanding, rather falls within the limits of social norms.

The Life of Yasumichi before the Retreatism

Until the end of lower secondary school, Yasumichi was a type of a *Gariben* (a nerdy student). Never being admonished by his parents and others, he always invested a lot of time for studying, and he did not allow himself to do something else. He always received good grades. What is more, he always did, what his parents and others asked him for, he never protested, and he also never had any doubts that he should be a person they wished. As he says, he was a good child, i.e. since he met their expectations with the surplus, he was a good child for his parents and others.

When he graduated from the lower secondary school, since he studied well, his parents decided to send him to a very good upper secondary school. He passed the entrance exams, and he felt that he achieved something.

The Transitional Stage

Being convinced that he is someone special, Yasumichi began studying in the upper secondary school. Nevertheless, at this level, he became just an average student. Since he did not receive the grades he wished, he felt frustrated. He began to get an impression that studying no longer makes sense to him, that he is trying to do something above his capabilities, and that he stops being a kind of person his parents expect from him. Finally, for the first time in his life, he has felt that there is in him a different man, than the one he knows.

Around the 2nd grade, he became unable to make friends. Around the 3rd grade, he became unable to talk to anyone. What is more, he began to go through the Rebellion Period. He thought a lot, and at the same time, he tried to get rid of all

his ideas and dreams. His parents constantly encouraging him to study, effectively "supported" him in this. He managed to graduate the upper secondary school, and he passed the entrance exams to the university.

Nevertheless, over time, he began to face difficulties with waking up and getting up. Since he was not able to attend the morning classes, and during the other classes, he was not able to acquire knowledge, he began to face difficulties to obtain credits. Finally, he had to repeat the year. He felt guilty that he had betrayed the expectations of his parents, and his parents, since they allocated a large part of their incomes to his tuition, were angry at him. They believed that he should do nothing, but just concentrate on studying. *Jigou Jitoku* (He reached conclusion that he owes himself). Around the middle of university, he completely began to avoid contact with others.

The Ascending Stage

Since in the middle of 3rd grade, Yasumichi was not able to finish a report, he could not continue studying, and he became a *Futōkō.* He left the house, and he pretended to go to the classes, but in fact, he rode trains around the city without any aim. Finally, he completely stopped attending these classes. Since no one was interested in this, he began to feel that everyone had forgotten about him. He again had to repeat the year. When his parents found out it, he asked them to let him quit the university. Nevertheless, they pressed him to graduate it. As a part of a compromise, for 2 years, he took a dean's leaver.

When his time was over, his parents realized that even if he will return to the university, nothing can help him. After the failures, he could not redefine himself, he completely lost his confidence, and he stopped leaving the house.

The Real Retreatism Stage

Since Yasumichi quitted studying until he joined therapy, as he says, his life was completely devastated. He was almost unable to leave the house (even if sometime he left it, it was late in the evening or at night), he was almost unable to do anything, he reversed day and night, and sometime, for few days, he did not take a bath or shower etc. What is more, he was constantly arguing with his parents who thought he has bad habits, and that he is lazy. They could not accept that he in the middle of the way gave up the university. They believed that since others somehow can manage with the problems of everyday life, he also should, and they threatened him that they will kick out him of the house. Nevertheless, as time passed, they stopped exerting the pressure on him.

The Climax Stage

For 2 years, Yasumichi, as he says, lived like a hermit. Finally, he reached conclusion that the only thing he can do is to die. At the same time, in order to find some help for him, his parents began to browse books and newspapers.

The Descending Stage

After trial and errors, Yasumichi began to attend therapy. After around 2 years, he began to establish communication and relationships with employees and other *Hikikomori* people, and then take part in various activities. Despite the guilt that his parents pay for everything, he began to feel relaxed, he began to regain confidence, and he began to feel that he is seeking improvement. After another 2 years, he reached conclusion that it is time for him to pay for his pleasures by himself. 2-3 days for a week, he began to do minor odd jobs in the places where no one asks about a biography, where are no high demands, in places where teenagers and students work.

The Returns to the Retreatism

Despite the fact that Yasumichi already is in his years, he does not have experience that other people in his age have, that other people expect from him to have. What is more, he is slowly learning to work. Sometimes, he cannot manage with work and soon quits it. It is difficult to live for him in the society where, due to the gaps in the life, he is unable to do what everyone else is doing. Thus, he is not convinced that without any breakdowns, he can manage life. Nevertheless, as he says, even if the wind will blow in the opposite direction, he would like to somehow maintain (Kalita, "Shakaiteki Hikikomori", 262-454),

Conclusion

In this publication I presented a fragment of the results of my doctoral thesis, in which I described a problem being at the center of my scientific interests - the *Shakaiteki Hikikomori* in Japan. More specifically, in this publication I presented the retreatism process of *Hikikomori* people.

On the following pages, I presented its definition - a proposal of the Japanese psychiatrist Tamaki Saitō who, broadly speaking, assumes that it is a kind of state that comes down to that, that for the most of time, one stays at home, and for more than 6 months, it functions outside the area of social interactions, and it is difficult to diagnose other psychological problems that could be its main source, as well as its own proposal that, broadly speaking, assumes that it is an example or a form of one of five types of adaptation to the situation of anomie named by the American sociologist Robert K. Merton -"retreatism".

Next, I presented the theoretical basis of my research.

Next, I presented the methodological basis of my research.

Next, I presented the results of my research - after explaining, that the quintessence of the retreatism process comes down in the examined group of *Hikikomori* people to the certain number of accidents overlapping each other that became the stimulus activating and deactivating their control mechanisms (external and internal) and their retreatism mechanisms controlling their actions that there was a kind of decision-making process in them, that their bond with

society and outside world did not break off suddenly, but gradually, step by step, I briefly discussed its five stages:

1. The Transitional Stage;
2. The Ascending Stage;
3. The Real Retreatism Stage;
4. The Climax Stage;
5. The Descending Stage.

Finally, in order to illustrate it, I presented The Life Story of Yasumichi.

Considering that I conducted my research on a relatively small research sample, its results require verification on a larger research sample. Nevertheless, since some regularities emerge from my description, in the future, it may become the basis for the development of The *Hikikomori*-retreatism Theoretical Model that may become useful in practice:

1. To take preventive actions;
2. To diagnose cases;
3. And to undertake the resocialization activities, according to the retreatism stage.

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WHY SOCIALIST REALISM? SPACE AND PROPAGANDA – THE BIRTH OF MYTH

Abstract

There is no single definition of socialist realism, nor is there a single name - either in Europe or in the world, for the entire propaganda and artistic movement. Technically speaking, the name of socialist realism is not widely used in Russia itself, but it is difficult to overestimate its role in the birth of a new myth, a new transcultural code that emerged nearly 10 years after the October Revolution as a result of rejecting constructivist accomplishments by the political establishment. The article strives to search not only for the definition but also for the roots of socialist realism, by mapping out new paths of its cognition. The role of propaganda in the recent history of Russia, is generally underestimated.

Keywords: socialist realism, October Revolution, Soviet Russia, USSR, Joseph Stalin, Lenin, World War II, socialist propaganda, constructivism

DLACZEGO SOCREALIZM? PRZESTRZEŃ I PROPAGANDA – NARODZINY MITU

Abstrakt

Nie ma jednej definicji socrealizmu, nie ma również jednej nazwy – tak w Europie jak i na świecie – zarówno dla propagandy jak i całego ruchu propagandowo-artystycznego. Formalnie rzecz ujmując, nazwa socrealizm nie jest powszechnie używania również w samej Rosji, jednak jego rolę trudno przecenić w narodzinach nowego mitu, nowego kodu transkulturowego, jaki wyrósł blisko 10 lat po rewolucji październikowej w wyniku odrzucenia przez polityczny establishment zdobyczy konstruktywizmu. Poniższy artykuł sięga do poszukiwań nie tylko definicji, ale i genezy socrealizmu, wytyczając nowe szlaki jego poznania. Powszechnie nie docenia się roli propagandy w najnowszej historii Rosji.

Słowa kluczowe: realizm socjalistyczny, rewolucja październikowa, Rosja Sowiecka, ZSRR, Józef Stalin, Włodzimierz Lenin, II wojna światowa, propaganda socjalistyczna, konstruktywizm

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> *In the Russian Communist revolution the power was exercised not by the real*
> *proletariat, but by the idea of the proletariat ... the myth of the proletariat.*
> Nikolai Berdyaev, *The Russian Idea*
> (Бердяев 2008, 264)

Introduction. Socialist Realism – Definition and Stereotypes

There is no single definition of socialist realism, nor is there one valid name for this period either in art or in propaganda. Formally speaking, the name "socialist realism" is not even widely used in Russia. The literature on the subject provides such terms as the "Stalinist empire" (*Сталинский ампир*), "soviet art deco" (*Советское ар-деко*), "socialist classicism" (*социалистический классицизм*), "Stalinist architecture" (*сталинская архитектура*), "totalitarian aesthetics" (*Тоталитарная эстетика*) or "post-constructivism" (*постконструктивизм*). The first term to go down in history, i.e. "socialist realism", appeared in "Literaturnaya Gazeta" (*Литературная Газета*) on 23 May 1932 (*23 мая* 1932) and it referred to the practice of agitating writers (Хмельницкий 2007). Two years later, it gained on popularity and was finally accepted thanks to the famous statement made by Maxim Gorky in 1934 at the All-Union Congress of Soviet Writers about the creative principle which was to be "realistic" or rather "national in form and socialist in content". It was, therefore, an ideological system of reference in manifold areas of artistic creation implemented by the USSR party apparatus and, as it is generally understood today, mainly supporting the personality cult of the head of the *социалистический реализм* state (Калабухова 2017). In the architecture and visual arts, it boiled down to the realization of Lenin's statements from the early 1920s about the future "combination of two expressive values: monumentalism and propaganda" (Коненков 2017). The new trends in this area were heralded by the tendency on the part of the new authorities to reduce types and forms of design to a strictly defined number of solutions approved and adopted by party officials. (Хмельницкий 2017).

1. Genesis and Theory Socialist Realism

The genesis of socialist realism stems from the need to redefine the overall concept of Russia at the time of abandoning traditional values which for nearly thousand years had provided Russian spirituality with solid foundations. A conviction of Russia following its own path beyond the idea of the European West prevailed already in the writings of all nineteenth century authors, i.e. Slavophiles, with A. Khomyakov (А. Хомяков) in the forefront (*Русский Архив* 1896). Those writers regarded it an indispensable element of the Russian mission to constitute a new form of monarchy in Russia, one opposite to Western absolutism. In the place of the king's supremacy, they proposed a tripartition of power based on the three areas of values that supported and complemented each other, namely,

Orthodoxy, folkism and the power of the tsar, however, not as an absolute ruler, but a guardian of the first two values. Nineteenth-century Russian messianism as expressed in the statements of its representatives from Dostoyevsky to Soloviev, rejected Western Christianity on the grounds of its being contaminated by the pride of intellectualism, wrongly justified in their opinion as one of the gifts of the Holy Spirit (Jesuits). This element of folkism was exactly what the 1905 Revolution called for, while the tsar acted as Western systems of authority. It provoked a dramatic decline of the tsar' popularity already shaken by the country's defeat in the war with Japan in 1904, which was also interpreted as a threat to the first of the three pillars, that is, to the Russian Orthodox Church in the Far East.

Socialist realism was able to emerge on the basis of the nineteenth-century philosophy of Russian messianism due to a skillful transformation of the entire mythical triad which retained and sustained the three former pillars of Russian spirituality, i.e. Orthodoxy, autocracy and folkism.

This issue is addressed, for example, in the book *History of Russian and Soviet Art* by Dmitri Sarabianov *(История русского и советского искусства,* Сарабьянов et al. 1989, 382-402), in which the author argues that folkism is still present in socialist realism in the form of Sovietism, just as ideology takes the place of Orthodoxy, and concreteness or, in other words, the act understood as determination in action, replaces former autocracy. Thus, the old triad: Orthodoxy, autocracy and folkism, is now replaced by a new one, semantically identical, but presented in the guise of different symbols, i.e. ideology, concreteness and Sovietism. According to the formula of socialist realism this Sovietism translates directly into a *community of comrades -* the working people of cities, towns and villages. Idealism, or the idea of the great mission occupies the former place of Orthodoxy, and act, i.e. the determination to change, or concreteness, replaces autocracy.

That message relied on the intuitive subconscious of the people, and it was made legible for millions through the personification of the old nineteenth-century symbols, among which the key role was played by enthusiasm, youthfulness and femininity. Russia is perceived as eternally youthful and it recurrently revives in the semblance of the world reviving with the annual return of springtime (Потяга 2017). Such is also the allegorical significance the *matryoshka doll*, a Russian wooden figurine (Kwiatkowski 2013, 502-503). The succession of those symbols galvanized the entire propaganda machine of the Stalinist period. In other words, it was not propaganda that inspired the image of the "socialist woman", i.e. the "female worker", but rather, it was the image of a woman that gave power to that propaganda. According to this new national spirituality, folkism (Sovietism) was represented by youth, honesty, simplicity and intelligibility of forms, autocracy was fulfilled in action, act and change, while Orthodoxy was embodied in femininity.

The above is clearly evident in one of the most famous novels of this period, *The Mother* by M. Gorky, in which it is a woman who becomes a depositary of the Orthodox Church (Горкий 1985). By rejecting the heritage of the West, just

as the nineteenth-century messianists (Бердяев 2008, 57-59), socialist realism consciously ignored the whole legacy of the Christian medieval Europe, including Byzantium. Instead, it brought to life a new Byzantium, one that will never fall again, hence, socialist realism contains references to the military powers of the ancient period, such as Egypt, Assyria, Persia, Greece and Rome, and it is Rome, specifically the ancient Rome, that opens the way for the whole heritage of the European Renaissance and classicism. As argued by Sarabianov (Сарабьянов et al. 1989, 382-402), the essence of socialist realism sprung from and appealed to the mythical space, which was meant to provide substance for the new state-building idea. This could only be achieved by rejecting constructivism and suprematism, movements considered, after all, as the art of revolution in the years 1917-1918. Disavowal of constructivism and suprematism was precisely dictated by those artistic movements' clear references to the Western art and in their origin in futurism and cubism born in the West. An important role in the birth of socialist realism was also played by Moscow as a city and an old capital, which, unlike St. Petersburg, was not built in the Western fashion. Although the revolution broke out in St. Petersburg, it was not a coincidence that Moscow became its capital, and later, the capital of the new communist state.

As A. Kuliapin and O. Skubach contended in *Mythology of Soviet everyday life in literature and culture of Stalin's times: monograph* (*Мифология повседневности в литературе и культуре сталинской Эпохи*, Куляпин and Скубач 2013, 18-24), socialist realism was primarily a Moscow phenomenon. Over the years of communism, there even emerged the phenomenon of a Moscow complex, as a perfect capital which everyone misses and in which everyone would like to live. The very word "capital" gets back in good graces in the context of that city. *Начинается Земля как известно от Кремля*, as V. Mayakovsky put it in one of his poems. Moscow was frequently and not only in poetry referred to as the center of the cosmos. On the city's 800th anniversary, Stalin claimed in his speech that Moscow provided a model for all capitals of the world (Куляпин and Скубач 2013, 18-24). This idea found its fulfilment in theory put forward by Slavophiles of Russia's specific character, according to which it was neither East nor West. It was itself, and so, it had to define and determine itself. It can be seen most clearly through a new vision, a new idea of the capital, different from any other existing so far in the world (Бердяев 2008, 48). Moscow's contemporary domination over other cities of the Russian Federation (the only megametropolis of this part of Europe), is practically in every respect based on, among others, the huge legacy of the 1930s' heritage of socialist realism.

Socialist realism as a mythologized state-building idea is perfectly illustrated, for example, in a well-known painting by Yuri Pimenov, *New Moscow* from 1937 (*Пименов* 1937). It contains all three elements of the above-mentioned mythical message, namely: 1) action - dynamism - youth (Sovietism), 2) metropolitanity (clarity of form, i.e. concreteness) and 3) femininity (ideology - hidden Orthodoxy).

Its message is also allegoric, because the high buildings depicted in the painting, the famous skyscrapers - *высотки Сталина*, did not exist yet in 1937 and were all erected at the turn of the 1940s and 1950s.

2. Lenin's Funeral

Moscow is also the place where the funeral of V. Lenin was celebrated. The event, which is rarely linked with the birth of socialist realism, provided the foundation for the new history of the state and nation. The role of propaganda, which at that time was already fully apparent, and which became triumphant and ubiquitous in the Stalinist period, is in this event generally underestimated. This celebration, which spread over a number of days and became a manifestation of the nation's unity, was deliberately designed to launch a new personality cult, even before Stalin seized the power. The party supported financially thousands of people arriving from the entire country to participate in the ceremony, engaging inconceivable amounts of funds. Similarly, the authorities spared no expenses on commemorating this event in numerous film chronicles and documents, in the press, visual arts, paintings, posters or sound recordings. In this way, the celebration took on a para-religious character, and its founding myth was consolidation of the nation's unity around the revolution, personified by its leader, V. Lenin. The slogan "Lenin eternally alive" originates precisely from this myth and it does not refer to V. Lenin as a person, but as an embodiment of the revolution, because it is in fact the revolution, which is "eternally alive". This is how potent symbols were being replaced by new ones. If, formerly it was Rus which was eternal, now it was the revolution, or the New Rus.

That maneuver bore testimony to Stalin's extraordinary propagandist skill, because actually it was Lenin who warned his closest associates against unpredictable consequences of electing Stalin as his successor. Paradoxically, this move resulted in consolidating the nation around the new power and it gave Stalin social legitimacy as the new father of the revolution. Stalin actively and in person joins in the development of the new culture, art and architecture and a consistent exchange of symbols continues. When Lenin's "deification" becomes a fact, Stalin deftly defines himself as the defender of his memory, and thus is acknowledged as his follower, although from the very beginning the leader intends to pursue his own policy. By deifying Lenin, he at the same time deifies the revolution and himself becomes its main "priest".

This play with symbols is still continued. A vast area of former Russia, and later of the USSR, was associated by nineteenth-century Russian mystics with God's blessing (Бердяев 2008, 228-232). Stalin changes its meaning to the blessing of the Sun - the Sun of the Revolution. "The sun never sets on our homeland," as the famous patriotic song of P. Aedonitsky and O. Fadeyev declares (Аедоницкий and Фадеев 2017), while earlier that shining sun was the Orthodox sun. The

revolutionary fighter, i.e. worker and proletarian, is being replaced by Sovietism, the proletariat's achievements, by Soviet achievements, in place of a workman (*рабочий человек*), there is a Soviet man (*советский человек*). This is how a new secular religion is born. The propaganda scene shown in the picture of Grigory Shegal's *Leader*, *Teacher* and *Friend*, (*Вождь, учитель, друг*, Шегаль 1937). shows an almost biblical scene embedded in the construction of plans cut out on the Renaissance mode. In the foreground there is a figure of Stalin and 11 out of 14 portrayed participants of the plenary meeting are staring at him. Those numbers are not accidental (12 in Judaism stands for fulfilling the measure of time and the number of Israel's generations, while in Christianity 11 + 1 is, after all, the number of the apostles). Stalin does not mean to gain the position of "god" as it is intended for the revolution and its personification, i.e. Lenin, but he takes the place of the leader, the first apostle, precisely as a teacher and friend. Lenin is becoming perfect, and with him the myth of revolution is developing as perfect and sacred, in place of the former Holy Rus (according to the key: Lenin is Revolution = Revolution is Holy = Revolution is Rus). A young woman situated in the closest proximity to the leader, personifies the living Orthodoxy. It is no coincidence that she is depicted next to Stalin, because in the light of new symbols, Stalin assumes the old role of the tsar as the protector of Orthodoxy, however, it is no longer the old Orthodoxy, which was "rejected by the nation" for the laziness of its representatives, but a new pure and noble one, just as noble as the features of a young girl (on this painting).

3. The Birth of the New Propaganda

What is often underestimated is the fact that Stalin was able to transform the potential of support generated by propaganda into real active participation of the society in following a specific path. For example, having raised adequate funds, Stalin launched large-scale social construction programs for multi-family housing complexes. In result, a newly introduced idea of a flat in the city with heating and hot water in the tap turns into a real dream and an object of desire for thousands of new, potential future residents. What is important, this dream can come true and, for the chosen ones, it actually does. There also appear dreamlike, but equally real: kindergartens, schools, nurseries, hospitals, which themselves become living catalysts of propaganda. It is all taking place according to a simple key: a new hospital, residential house, railway station, or hotel is clean, comfortable and modern, but the most important of all those adjectives is "new", i.e. one that was not here before. The language of communist propaganda manipulates this fact quite audaciously (Меерович 2007, 281-292). A new object is, in the language of propaganda, defined as a gift offered to the nation, because it is this new authority which is reliable, modern and resourceful, that is how the cult of the welfare state is created. In visual arts, but also in propaganda of the authority, the play of colors appears as an element of new mythology. The clean, bright, white clothes of

authority representatives both in paintings and in reality (Stalin's white uniform) convey the same message as the propaganda of the new white houses. Visual art of that period depicts no real image of a construction site, i.e. one associated with gray concrete or red brick. Instead, all presented buildings are white due to the apotheosis of novelty and modernity, the red colour, on the other hand, is reserved for the banners of the new authority. Similarly, Stalin's white uniform was not meant to negate the prevailing bloody terror (as an antidote to the red, brotherly blood shed at that time), but it was rather the color of the New Russia, the new religion, that is, the Revolution of prosperity and modernity for all. White is the whiteness of modernity and change, the color of the Sun's cult, the cult of the new power, where the leader guards and sees everything. Just as the sun is shining and warming the earth for free, the leader is similarly watching over the nation, so that everyone can sleep peacefully.

This uniformity of life at all levels was not accidental. The propaganda of the path, the means and the objective was meant to recall the genesis of the revolution and its patriarchal, hierarchical roots which could be traced back not to the workers' structures but to the army, because in the final game it was the army that decided about the victory of the revolution (Бунин 2004). That is why, all aspects of the revolution had their uniform and rank, their logic, i.e. the army logic, just as the army itself which originates from the people and is given back to the people. In this military logic, everyone had their own task, imposed on them by the revolution. That is why, the propaganda of that period was not, in its expression, addressed to collective but to individual feelings, which stood in contrast to national socialism in Germany. In socialist realism, it is the symbol that is "looking at" an individual, therefore that symbol must have a figural form - a personification. Socialist realism constituted, therefore, a realization of a certain myth, it was a certain order that surrounded the citizens of the new tomorrow of the communist homeland. Present in literature, architecture, in the shaping of space, sculpture and painting, it was to be identified with lavishness, monumentality and implementation of large scale assumptions, it was to arouse pride, be posh, palatial, but also civic, and above all, soviet. From the early 1930s, such terms as workers' and proletarian begin to be eliminated from the cultural and artistic circulation and replaced by the word Soviet – the Soviet state, Soviet man, Soviet homeland (Луначарский 1975).

Implementation of the large-scale socialist realism was possible as a result of the financial stabilization of the new communist state, which took place at the turn of 1929 and 1930. What is often overlooked in the assessment of those events is the fact of a certain coincidence of two important events taking place in the world economy of the twentieth century. Exactly when the Western world plunged into the great global crisis (1929), the USSR for the first time achieved a state of permanent balance of the state's revenue and expenditure. In 1932, by the resolution of the CPSU political office all avant-garde artistic groups were dissolved and all experimentation with the figure and form in architecture was

rejected. This was a clear indication that those searches did not contribute to the development of solutions worthy of the first communist state. It was a sign of the upcoming socialist realism. Already in 1931, during the preparatory works preceding the General Plan of the Redevelopment of Moscow, the Cathedral of Christ the Savior, founded as a votive offering for Russia's salvation in the war with Napoleon in 1812, was demolished. The church played a significant role, not only due to its location, since it was a dominant connecting the complex of Kremlin buildings with the old Moscow, situated at the end of the Bulwark Ring at the embankment of the Moscow River, but also because of its role as a cenotaph, a place of remembrance for all victims of the 1812-1815 war.

4. PROCLAMATION OF SOCIALIST REALISM – THE PALACE OF THE SOVIETS

The competition for the Palace of the Soviets (1931) was a breakthrough moment, a time when socialist realism was triumphantly introduced as a binding style of the state. Very soon, this triumphant march entered also the architectural world press. 140 works from around the world were sent to the first part of the competition, which had an open formula. The most famous architectural teams, participating in it included Le Corbusier, W. Gropius, but also, I. Żółtowski (И. Жолтовский), W. Tatlin (В. Татлин) or K. Malewicz (К. Малевич) (Зиновьева 2009, 124). Only few contractors were invited to the second stage of the competition. It was finally won by Boris Iofan (Борис Иофан), who until 1924 stayed in exile in Italy and Switzerland, and who was called to Russia on the express command of the AUCP (B) [All-Union Communist Party (Bolsheviks)]. Together with this competition, monumentalism permanently enters Russian architecture. This is clearly reflected in the proposed height of building, i.e. above 400 m (420 m). It is worth noticing here that the aforementioned role of the myth's personification took on a spectacularly "animated" form in the case of this object as it was crowned with a 75-meter-long naturalistic sculpture of Lenin (the overall size of the statue measured with the outstretched right hand). It should be added, that the winning project contained a number of eclectic elements, harking back to the ancient architecture of Mesopotamia, Egypt and Greece, which confirms the theses put forward above. The object was to refer to famous buildings, the 7 wonders of the ancient world. The Palace was supposed to draw upon the Mausoleum of Halicarnassus, the Colossus of Rhodes or to the Lighthouse of Faros. The Lenin statue was to be visible from a distance of 35 km. Because of its crowning with the figural sculpture, this object played a role of a monument dedicated to the leader of the Revolution (Васькин and Назаренко 2009).

At the end of the 1930s, the foundations of the Palace of the Soviets were already laid and it seemed that nothing could prevent its fast construction. However, the matters took a different course, due to the war with the Nazi Germany which erupted in June 1941 and, virtually overnight, led to redirecting all steel production from the construction industry to production of armament.

5. General Plan for the Reconstruction of Moscow

Notwithstanding the fact that the Palace of the Soviets has never been built, its role has always been very significant up to this day. Even at the time of the competition and, later, during the completion phase of the project, it became a showcase of the new architectural style adopted in the USSR, reproduced in hundreds or thousands publications around the world. 5,000 people were involved in the preparations for the construction, therefore, it is no wonder that it soon became a living legend, on a par with numerous other buildings of humanity which no longer exist today. The planned construction of the Palace of the Soviets at the site of the Cathedral of Christ the Savior was dictated by an open struggle with the old symbols of the Orthodox Church, as well with the attempt to create a new image of Moscow as the capital of the communist state. The General Plan for the Reconstruction of Moscow was meant to serve this purpose (W. Semienov [В. Семенов], S. Chernyshev [С. Чернышев], A. Striemantov [А. Страментов]) Initially, it was to be implemented between 1935 and 1941, but as a result of the war its realization was postponed to the years from 1945 to 1957. This plan announced the construction of high-rise buildings (enforced by the government's decree as late as in 1947) that were supposed to change the skyline of the entire center of Moscow. The key role, next to the Garden Ring (*Садовое Кольцо*) was to be played here by the south-west urban opening of the center to the founding of the University of Lomonosov in the Leninskie Mountains (*Ленинские горы*) (Goldzamt 1956, 293, 305-336). Consolidating the ring of new squares around the walls of the Kremlin was also supposed to support this conception (Баранов et al. 1958, 52-61). The plan assumed, moreover, redefining the spatial arrangements of Moscow's main historical squares, mainly around the Garden Ring (*Садовое Кольцо*), and modernizing (extending by approx. 50%) the main communication routes of the radial street system of the capital (Генеральный 2017)[2]. The whole was to be complemented by the introduction of huge green areas as urban parks, especially in the northern part of the city, such as Ostankino (*Останкино*), VDNKh [Vystavka Dostizheniy Narodnogo Khozyaystva] (*ВДНХ – Выставка достижений народного хозяйства*). The architects planned to link the main railway stations and their squares with new street sections: Tverskaya Zastava Square (*Площадь Тверская застава*) – Belorussky Railway Station (*Белорусский вокзал*), Moscow Kursky Railway Station Square (*Площадь Курского вокзала*) – Moscow Kursky Railway Station (*Курский вокзал*), Komsomolskaya Square (*Комсомольская площадь*) – Moscow Leningradsky Railway Station, Moscow Kazansky Railway Station and Moscow Yaroslavsky Railway Station (Баранов et al. 1958, 52-61).

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[2] Moscow's general development plan was approved on 10 July 1935. It became the first document in the history of urban planning, in which a plan of socialist reconstruction of the largest metropolitan city was drawn up on the basis of a scientific program. The overall plan assumed increasing Moscow's population from 3.66 million in 1935 to 5 million people before 1960 and extension of the urban area from 28.5 thousand up to 60 thousand.

6. Practice

The plenary session of the Central Committee of the Communist Party of the Soviet Union devoted to the reconstruction of Moscow took place on the initiative of Stalin already in 1931. It brought to the end the influences of the dis-urbanist environment, i.e. experimenters of the linear city, henceforth referred to within the party apparatus as vulgarizers of Marxism. Stalin strongly opted for the economics of traditional big cities. The urban reconstruction of the city included mainly frontage development with increasing the number of floors up to 6-7 (Stalin's direct decision) with sharply defined deep cornices, sometimes a slightly receded last storey, often with arcade motifs of the attic crowning, and from the earlier constructivism period there still remain large windows relatively larger than in historical styles and secession (Хмельницкий 2017). The whole was complemented by the particularly high commercial ground floor. Reconstruction of Moscow's historical squares consisted mainly in their extension, ordering, improving their symmetry or axiality, replacement of buildings with higher and monumental ones (Sudjic 2005).

Two flagship achievements of socialist realist architecture of this period include the Public Library of Lenin (currently of F. Dostoyevsky), whose construction began in 1930 according to the design of Vladimir Gelfreykh and Vladimir Shchuko, and the USSR pavilion for the 1937 world exhibition in Paris by Boris Iofan with the famous 24-meter sculpture of two figures, a worker and kolkhoz woman by Vera Mukhina (yet another example of the new semantic triad personification). Both realizations exemplify a pure, dynamic trend of socialist realism which bears affinity to the contemporary monumental, though not socialist, architecture of other countries, such as the Polish National Museum in Warsaw by Tadeusz Tołwiński, Italian Palazzo dei Congressi by Adalberto Libera or the early works of A. Speer in Germany (Sudjic 2005; Speer 1990, 94-95).

The library design was drawn up in the years 1927-1929 as a result of cooperation between a seasoned architect brought from Leningrad, representative of the older generation, who already practiced widely before the revolution, and a young architect of the revolution, i.e. G. Gelfreich. The design is still embedded in the dynamics of the constructivism era. Its present form is slightly changed, since after the war there appeared numerous reliefs and sculptures held in the symbolism of heroism and socialist triumphalism and devoted to the great victory over fascism, an effect of additions and decorations from the late 1940s.

Compositions of figural sculptures complementarily linked with utility buildings as a form of communicating the state-building idea, become a leading element in this period. This is perfectly visible in the next great design, i.e. in the works on the Paris Pavilion. The architectural concept of the pavilion is indirectly based on the achievements of futurists (Y. Chernikhov) and suprematists (N. Suetin and his activity in the work on interior architecture). The form of the exhibition

pavilion in Paris combines perfect correlation of proportions and arrangement of the building's parts, with the dynamics of the figural group arrested in movement. Both figures step forward, as if resisting the powerful hurricane of history. The air of clarity of action, youth and femininity fully permeates the symbolism of the new spirituality of Russia. It is thus the personification of the entire pantheon of the virtues of the new communist society.

While observing the initiatives taking place in Moscow before the Stalingrad turning point, it is difficult to refer to this situation as a crisis or a war, for example, marginalizing social activity to a minimum. On the contrary, schools, theaters, museums and libraries work at full speed at that time. Major construction programs are being implemented or started from scratch even in the summer and early autumn of 1942. Also in the summer of 1942 "Literaturnaya Gazeta" (*Литературная газета*)[3] announces that the contest for the Monument to the Heroes of the Great Patriotic War will be resolved in Moscow, perhaps it is clear that Stalin already knew he would win against Germans, although the Wehrmacht Stalingrad defeat was to become a fact only a few months later.

7. The War and the Birth of Socialist Triumphalism

The war and the crushing victory of the USSR in the clash of two military colossi in World War II brings a clear shift in the development of socialist realism towards the principles of ordering space, outside the historical context of place and style. Those old rules will not be found in new realizations, even on the scale of earlier implementations of the war period (*Архитектура Византия* 2015). A new rhetoric of the apotheosis of the heroes, apotheosis of the heroic state, adopting elements of a specific hieratic attitude, is developing. Those include: palms as a symbol of victory, frequent use of leaves and branches of laurel and laurel wreaths (Зиновьева 2009, 238). Figural sculptures abandon the pose of activity, action and deed in favor of the parade formula and command the weapon (drums, weapons, uniforms appear, but the attributes of work are also retained). There also appear sculptures and figures of women, but they almost always include one woman holding a child in her arms, and usually only with one child, because the place of the former personification of religious faith is now replace by secular faith. This new woman mother-heroine (*мать героиня*), after all, the idea behind the name of the order (1944) is no longer the depository of the hidden Orthodoxy, but an apotheosis of the victory and the vital forces of the nation, an embodiment of faith in the serene future of the great power[4]. The words hero and heroism recurrently appear in almost every area of life. Urban planning assumptions

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[3] In the years 1942-1944, the newspaper was published under other titles: first, "Советское искусство", and then "Литература и искусство".

[4] A greater number of children appear in the image of a woman outside of her symbolic role when the mother shows her real motherhood.

more and more often, but mainly after 1945, include motifs of triumphal arches, similarly in architecture, in the entrance portico of the main facades, large state administration buildings or municipal offices.

8. Palaces of Hope

The decision to build tall buildings characteristic of this period was determined by a decree of 1947 and was a response to the 800th anniversary of Moscow (Калабухова 2017). Among the "Seven Sisters", i.e. the seven tallest Stalinist skyscrapers from the period of socialist realism, Lomonosov Moscow State University – MSU's seat (МГУ- Московский государственный университет имени М.В. Ломоносова) has a special place. It is a benchmark for other buildings of that style and for the entire formation of socialist triumphalism (Зиновьева 2009, 212-230). It reveals a number of borrowings and inspirations from ancient architecture (Kulishov 1954), especially of ancient Egypt (obelisks - axiality - zonation). As regards western architecture, it was the Manhattan Municipal Building (177 m) in New York, built between 1905-1915 by William Kendall, that became the source of inspiration for both that building and all the other Stalinist architecture.

At the same time, the architecture of skyscrapers was firmly embedded in the national tradition. It contained references to the symbolism of the great historical buildings of the Russian heritage. There were references to the towers of the Kremlin, the Ivan the Great Bell Tower (*Колокольня Ивана Великого*), the Menshikov Tower (*Меншикова Башня*) or the Bell Tower of the Novodevichy Convent (*колокольня Новодевичьего монастыря*) (Зиновьева 2009, 213).

Interestingly, what is rarely mentioned, all of the seven Stalinist skyscrapers in Moscow are much lower than the Warsaw Palace of Culture and Science (237m with and 187m without the spire). Many sources contain glaring inaccuracies on that point. And thus, the highest of the Moscow monumental palaces, the MSU building, measures 180m without the spire and 206m with the spire, the next is Hotel Ukraina - 170m, followed by Leningradskaya Hotel – 157m, just as the Kotelnicheskaya Embankment Building (*Котельнической набережной*), the Kudrinskaya Square Building – 120m, just as the Ministry of Foreign Affairs building, and the Red Gates Administrative Building which measures only 110 m. The skyscrapers were mostly designed by the same architects, members of the same wide team, in different configurations, namely, D. Chechulin, A. Polyakov, N. Borecki, L. Rudniev, A. Mordvinov, V. Gelfreykh, M. Minkus (Goldzamt 1956, 305-336).

9. The Return of Myth Times. The Myth of Metro Builders

The beginnings of Stalin's rule also mark the beginning of the great construction of the metro network in Moscow. Until 1935, the first section of the first metro line Culture Park - Sokolniki (*Парк культуры – Сокольники*) is

being built serving the strict city center of less than 12 km. Until 1938, a fragment of the second line is built in the direction of the Belorussky Railway Station. During this time, a new stage opens up to the society, the memory of the past is restored, past monuments, excluding the religious ones, are again taken under the state protection, mythology of great national legends is brought back to life and films celebrating great national heroes such as Alexander Nevsky and Ivan the Terrible are made. Besides all this, there is yet another change, probably the most important one, namely the world of old folk tales, the world of childhood is revived and reconstructed. Andresen and the Grimm brothers can be published, and people can again read old Russian folk tales such as *the Humpbacked Horse (конек гарбунок) czy Emelya and Magic Pike (Емеля на печи)*. Earlier, in the years 1918-1930, the world of children's books, like the whole world of visual arts, was dominated by constructivists. It was thus subordinated and based on the praise of rationalism. Enthusiasm was generated by the joint action for the common good, white, black and red dominated, everything was in motion, deeply imbued with slogans and the plot was a comic-like propaganda story, where a good, young and well-groomed pioneer, girl or boy always won, princesses and good fairies did not exist, and *Emelya* – if came into being – could only be described as a damage-doer. During this period, there was no individual heroes, only a group, a team, a collective hero existed, and the atmosphere of mystery was replaced by technique and modernity (which was measured by the reading and writing skills – for this reason books were written in a large slogan font, to make it readable for children).

Those changes provide basis for the new beginning of transformations, this time bottom-up ones, the environment of the metro builders, the heroic creators of the underground capital, is consolidating (1935-1941). The myth of mystery, the myth of a great cause is subtly developing. It is a truly ideological one, because not built for the purposes of immediate propaganda, but for future generations. The idealized faces of bas-reliefs have the same facial expressions, identical to each other precisely because they convey the timeless mystery of "the future and the past": the girl's head with the hair down appearing on the reliefs of the *Komsomolskaya* (*Комсомольская*) station (Фотопроект 2017) tries to surpass the socialist realism convention by referring to the Renaissance painting by Sandro Botticelli *The Birth of Venus*. This may not be the beginning of a new cinquecento, but the materialized world of fairy tales (1938).

Notwithstanding the fact that they delight everyone, the splendor and richness of the metro stations were, paradoxically, not addressed to the contemporary masses, but rather to those who were yet to be born, to the new generations of Moscow residents. It is them who will discover the loneliness of the underground work and believe in the nation, in this kinship of generations united by the rhythm of thousands of hearts subsided in silence, for tomorrow's beloved homeland. To understand this metaphor, as well as all socialist realism, one must know and understand Russia, know and understand Russians. When admiring

the underground pantheon at the Ploshchad Revolyutsii metro station (*Площадь Революции*), one comes up against the ethos of folk tales, the deeply-asleep land of animals and children, and the presented figures are like guardians of an enchanted world, which can only be entered on uttering a magic word. What is this world? Paradoxically, this is not a rhetorical phrase, because in reality, metro provided for many place of refuge, and the word opening that underground world was hope. It was an enclave of great hope for the future in the new Moscow. Works on the construction of the metro were given priority by the state already before the war, but also shortly after. Metro became a place gathering those who were looking for a real ethos of work, work without conformism and efforts for promotions within the party structure, often gathering those who were just unwelcome on the surface: there they found employment and security. This is how, the myth of noble people, the metro builders was born. The Moscow metro was their world, their fruit, their metaphor of the future Russia - these are not the palaces for Stalin but an endless foyer of invisible theaters from which real actors may one day return. Such is the myth of the metro. It is not without reason that the theater is especially loved by the Russians, because it bears significance to them, it signifies something more, something invisible and inexplicable at the same time, something that they did not allow to be taken away from them during the dark night of communism, something that is difficult to understand if one does not understand Russia.

Conclusions

To sum up, it must be stated that the Stalinist period in the visual arts was radically and definitively severed by the war, which brought about a new form of socialist realism, namely, socialist triumphalism. Once socialist realism evolved into socialist triumphalism, it was impossible to recede to its pure original form. Its manifold manifestations involving the ubiquitous rhetoric of victory resulted in undermining the natural internal discourse of the whole direction, and a the same time, the development of socialist triumphalism became impossible without damaging its own doctrine. The whole direction was doomed to slow drifting in time, without the possibility of correction.

It should also be added that socialist realism is not one of many trends in the history of art, architecture, the shaping of space, drawing upon or breaking with the legacy of its predecessors. Socialist realism is first and foremost an attempt to revive a myth and to impose on it the principles of a certain order, e.g. a construction order in architecture on the scale of ancient great imperial powers.

It is also worth drawing attention to the spatial, actual placement of this myth and its close relation with Moscow as the capital of the USSR. Moscow is recognizable for both its citizens and visitors through the Stalinist architecture. This is reflected in numerous surveys carried out, among others, among young people in the years 2008-2012. The identity of Moscow is linked with the architecture

of the Stalinist period among the vast majority of respondents. A similar study was conducted in kindergartens. Children asked to choose from a file of photos the ones presenting Moscow, manifestly pointed to those with socialist realism architecture and rejected others (Dukin 2007, 15-29). It clearly shows that the revival of the myth has become a fact that is hardly disputable.

In conclusion to this search for the genesis of socialist realism, it can be argued that the idea of socialist realism cannot be properly felt and understood without the awareness of people's participation in one common idea, and thus in the resulting individual relations of obligations and civic duties. Socialist realism in architecture in any other place in the world than Russia can only be a pale imitation of the original (Paperny 2002). The works of socialist realism implanted in various parts of the world (in Poland, Latvia, the former East Germany and finally in China) do not allow to grasp the pure idea of socialist realism, but only of the socialist triumphalism, which in fact serves the apotheosis of the Red Army's victory over fascism. Nevertheless, it is worth noting that socialist realism, especially in its early, pure form, found its place in the history of architecture. Inspirations drawing on socialist realism are present in the works of numerous artists of the twentieth century, for example in housing construction realized in France or Spain - in the architecture of Ricardo Bofill, whose attempts can be described as close to neo-socialist realism.

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THE LIMITS OF FREEDOM IN TOURISM[3]

Abstract

The present article provides reflection on the limits of freedom in tourism with special emphasis on the attitudes of tourists behaving on the verge of what is acceptable and unacceptable from the social and moral points of view. The attitude of tourists may take the form of egoistic hedonism manifested in kind and acceptable behavior, which is natural for tourist practice, or in border behavior, which violates both social and legal norms and is, therefore, morally unacceptable. The analysis of these borderline situations points to momentous character of the issue of the limits of freedom in tourism and their cultural conditioning.

Keywords: tourism, freedom, border behavior

GRANICE WOLNOŚCI W TURYSTYCE

Abstrakt

Przedmiotem artykułu jest refleksja poświęcona granicom wolności w turystyce, koncentrująca się na postawach turystów poruszających się na granicy zachowań akceptowalnych i nieakceptowanych ze społecznego i moralnego punktu widzenia. Nastawienie turystów ma postać egoistycznego hedonizmu mogącego przybierać formy zachowań naturalne dla praktyki turystyki, łagodne i akceptowalne albo postać zachowań granicznych, naruszających normy obyczajowe i prawne, nieakceptowanych z moralnego punktu widzenia. Analiza owych sytuacji granicznych pokazuje realność problematyki granic wolności w turystyce i ich kulturowego uwarunkowania.

Słowa kluczowe: turystyka, wolność, zachowania graniczne

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Introducion

The tourist experience satisfies two, basic in this respect human needs, namely, the need to explore the world and to experience the pleasures of traveling. These needs oscillate between what is possible to achieve in a person's locality, and in the outside world towards which humans orientate themselves in the process of shaping their identity. The goods of travelling comprise the qualities of the world experienced by people through their senses, even if they refer to their spiritual rather than physical constitution. The need to explore the world in its diversity goes beyond what is local and mundane. Multiculturalism, which characterizes the Western society allows many of these sensual aspects of the world to be experienced locally.

Traveling is a unique practice, it constitutes a value and a good in itself, but it is also a way to acquire goods unattainable in tourists' locality, which also include border experiences remaining on the verge of the ideal model of tourism. These border experiences do not have the character of content or images, which in today's world seem to be boundlessly disseminated. The essence of border experiences boils down to carnal practices. Therefore, their consumption requires real, physical presence in places where they are made available, and tourism, instrumentally used as a kind of "alibi" and being in fact a form of traveling, serves this purpose. This "tourist alibi" is a commonly used practice to justify traveling to other parts of the world, regardless of the motives and goals that underpin that journey.

This article is aimed at an attempt to outline the issue of freedom in tourism analyzed against the assumption of the asymmetricalness of modern moral structures. The article does not address the question of the ethical bases of tourism practice, common rules of conduct, or the nature of ethical codes in tourism. The reflection on the issue of freedom in tourism is based on an objective approach to tourism as a tool to satisfy those needs of tourists which cannot be satisfied locally, because they constitute unacceptable behaviors of a given community. The asymmetry of moral structures means that behaviors unacceptable in one social sphere can be accepted in another. Viewed in the universal perspective of the issue of freedom, unacceptable behaviors fall into the category of border behaviors. The present analysis focuses on the conceptual structure of reflection on the issues of morality confronted with the reality of postmodern tourist practice illustrated through reflection on the category of a tourist type and an analysis of empirical facts as well as on seeking a conceptual expression for a type of tourist grasping the search for an area of freedom to meet the needs comprised in the category of hedonistic, lifestyle and existential needs.

1. Typologies of the Tourism Subject

The present reflection concerns people manifesting their freedom in the acts of travelling. It does not refer to subjects running away from totalitarian enslavement, system constraints, and political or religious persecution, but people free in their

essence, though limited by social realities of their locality which are transgressed by them in the act of traveling. Tourism is treated as an object, a tool enabling acquirement of goods sought beyond a person's locality. It provides such a person with a space of travelling and a kind of "alibi" covering up true intentions behind traveling.

Among the ten types of tourists distinguished by Todorov, two may be pointed out as having some elements in common (Todorov 1996). Those include, the "exotic" and the "exile". "Exotics" are fascinated with otherness and foreignness rooted in cultural dissimilarity of behavior patterns, while "exiles" are determined by the need to abandon the limitations of their environment and they are defined as people not belonging to their own locality, tending to adopt patterns of behavior accepted in a new place.

Because the "act of exile" constitutes a subjective decision of an individual, this attitude may be argued to bear the features of escapism from a subjectively defined state of enslavement consisting in the impossibility of satisfying individual needs in accordance with a person's demands. Cohen's typology distinguishes four types of tourists (Cohen 1979). In this approach, three would coincide with the one pertinent to this study, namely, the "change seeker", "experience seeker", "experimenting tourist" (Podemski 2005, 52-53). "Change seekers" are escapees, running away from the boredom and prose of daily life, which can occasionally lead them to behaviours verging on what is allowed. Norm transgression provides a common remedy for boredom and it constitutes tangible rejection of everyday life regulated by those norms. "Experience seekers" are tourists alienated from their community, not accepting its "axiological center". They are characterized by the search for new meanings outside their locality, just like "experimenting tourists" who test various existential options.

In his former typology, Cohen makes an important distinction between institutionalized and non-institutionalized tourists (Cohen 1972). Getting involved in situations verging on borderline behaviours in tourism constitute an individualistic attitude and, since tourists return to their locality, they must have a guarantee of secrecy as regards their activities. Consequently, such travellers will appear in a non-institutionalized model providing greater privacy and lack of control on the part of co-tourists. Two of the roles identified by Cohen converge with each other. "Explorers" will choose the destination, route and character of their journey by themselves, avoiding mass routes, while "drifters" will "drift" on the outskirts of the world of tourism, rejecting the values of the world that they come from. With respect to the character of their travels they will rather be "nomads" than "settlers" (Prinke 2008), which will help them avoid censure and sanctions induced by their behavior. However, as regards this type of tourists' motivation, they can become "settlers" when discovering in some tourist spheres an "oasis of freedom" enabling them to find their own fulfillment.

As Podemski notes, "a new type of space is emerging and developing in the modern society, a space delimited specifically for tourists" (Podemski 2005, 64).

Viewing the category of space through the social prism would allow to indicate communities offering tourists a wide margin of behavioral tolerance in which border behaviors are accepted. Such places would induce tourists to return to them. They would rather present a heterogeneous space than an enclave (Edensor 2001), one in which tourists would find it easier to "blend into the woodwork", although enclaves will be characteristic of tourist products gathering tourists having homogeneous needs in "one place", as in the case of tourist trips dedicated to sexual minorities. The structure of an enclave, in this case, offers the status of being "among friends", guaranteeing acceptance and lack of sanctions in relation to a particular behavior. A parallel phenomenon is the so-called ghettoisation of space that leads to the creation of enclaves of wealth and happiness as well as poverty and human dramas (Jałowiecki and Łukowski 2007).

2. Tourism as an Act of Self-Fulfillment

The analyzed type of tourists pursuing border experiences does not directly match tourist typologies proposed in literature. Those tourists bear the features attributed to various tourist models in previously presented typologies. They could be referred to as the Dionysian type, due to their strong need for new, border experiences. Kosiewicz characterizes dionysianity as affirmation of life's turmoil as well as of temporal, bodily and sensual values (Kosiewicz 1998). Nietzsche in the *Birth of Tragedy* contrasts the Dionysian nature with Apollonianism, seeing in it an element that is the essence of life, wild indefiniteness, chaos and unbridledness, a state of intoxication and ecstasy (Nietzsche 1994).

Certain analogy with the Dionysian type could be found in the interpretation of "extreme tourists" made by Pawłucki. In his view, those tourists are escapists who, on the basis of the "market offer of extreme freedom" were granted a "concession to lawlessnes", pushing them to the trap of "postcolonial enslavement" (Pawłucki 2004, 323). Another conclusion made by Pawłucki referring to the above mentioned context of freedom and social enslavement of an individual is worth quoting here: "The extreme tourist's act can (...) be seen (...) as breaking away towards freedom (...). Viewed from such a perspective (...) extreme tourists, although reprehensible in themselves (since no one should expose themselves to the risk of losing themselves) - seem to pursue a fairly sensible project, in which their going sideways towards risk-taking is an indispensable condition for their return to the safe rationality. This, however, is apparent rationality" (Pawłucki 2004, 322). The question of such behavior's reasonableness remains suspended between the subjective approaches to the limits of human freedom that set the basis for the moral assessment of their behavior. Assessment of people's behavior who found themselves in borderline situations in result of their voluntary choice, points to the lack of a unified axiological basis for the assessment of acts of freedom

within one community[4]. The indicated asymmetry of moral structures is therefore of intercultural as well as intercultural dimension.

3. Tourist Goods Market

The goods offered to people by their local environment are at a certain stage of their lives recognized and experienced by them to be later incorporated into everyday practice. Consequently, they no longer have the advantage of novelty, otherness of impressions or uniqueness of experience. It is, moreover, not always possible for people to devote themselves to them or to concentrate on experiencing them. Mass culture provides people with knowledge about the diversity of world goods and ways of exploiting them. As a resident of modern times, man lives in media-mediated culture supermarket: "We consume (...) products from the global supermarket of culture in the belief (largely wrong) that we can buy, do and be anything we want" (Mathews 2005, 7).

Mathews makes a distinction between the supermarket of material goods and the supermarket of culture. The idea of the world of tourism as a supermarket of culture comprises a combination of both markets. Tourism offers cultural goods for which, however, we pay just like for any other material goods. It is understandable, since those tourist cultural goods usually have their material objectification and as such are offered on the market of tourist goods. The tourist market puts up for sale the most interesting, the most important and the most attractive goods, therefore, it is a collection of commonly desirable goods, although access to them is also subject to state regulation, determined by age, gender, class affiliation and the degree of affluence that limits the freedom of choice.

4. Liberalism and Availability of Tourist Goods in the Light of Research

Modern times are characterized by the fact that irrespective of the contents acculturated in the locality, people construct their own cultural identity, choosing the content, and thus creating an eclectic model of identity (Lyotard 2009). National affiliation is related to the degree of human acculturation with respect to liberal values and their basis, i.e. the principle of tolerance, shaping the attitude of openness to the world (Mathews 2005). Diversification of national affinity results in cultural diversity. Liberalism, regardless of accepted conceptualizations of ideas, has its own diversified face in the pragmatic aspect as regards socially practiced patterns of behavior[5]. As Hołówka emphasizes, "liberalism demands

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[4] A plausible example here are people's judgments and opinions expressed in the media with reference to the tragic events on Nanga Parbat in January 2018, which reflected moral standpoints on the issues of the limits of human freedom of behavior that were contradictory with regard to their axiological foundations and expressed views.

[5] It is worth quoting in this context the research findings included in the report of the European Monitoring Centre for Drugs and Drug Addiction *Travel and drug use in Europe: a short review*

compliance with the law, but it allows much more than it demands" (Hołówka 2001, 371). Liberal societies accept the existence of an open space that allows for unpracticed, unacceptable or even, as in the case of drugs, prohibited behavior. Social liberal structures tolerate wider margins of tolerance towards individuals, pushing the limits of acceptability of human behavior. These social structures are not symmetrical even within the Western civilization. Such an asymmetry enables practicing various patterns of behavior by moving from one community to another which is naturally made possible by a commonly accepted pattern of travel.

In the post-modern era, the emphasis on social position is made by means of consumption. The higher the social position, the less available for the whole society catalog of consumed goods. The need to differentiate oneself and mark one's distinctiveness or social uniqueness is also revealed in the attitude of contestation: "contestation-marked consumption and entertainment determine an individual's prestige. Those individuals establish their social position by demonstrating an adequate lifestyle which is inaccessible to others (Cywiński 2013). In the case of tourists, those will be elite and exclusive tourist products, highly exotic destinations or practicing border behaviors.

The message of the market is very strong: "you can buy and do what you want, and be who you want; you can pursue happiness following your own way, according to your preferences, using the world's cultural resources" (Mathews 2005, 27). It would be difficult to indicate a stronger motivation to travel. The laws of the modern market, imprinted in human consciousness, lead to an analogous treatment of the tourism space in which goods are purchased for one's own pleasure. The limits of freedom as regards consumption are pushed towards communities that define this freedom in a similar way, either for their own use or for the use of visiting tourists. In their own locality, people succumb to the pressure of their environment, however, they leave this pressure behind for the time of travel expecting tolerance for their behavior from visited destinations on the grounds that by merely being "strangers" they are guaranteed a greater margin of freedom. People head towards liberal societies in the belief that "liberalism respects civil disobedience as a rule and recognizes it as one of the sources of law" (Hołówka 2001, 372).

(Gyarmathy 2012). The authors point out, inter alia, that due to the specificity of drug tourism, it is difficult to present statistical data illustrating the global scale of the phenomenon. At the same time, however, there are reports describing the behavior of certain specific groups. One can even cite research carried out in a group of 6,500 German and British tourists aged 16-35 who travel by plane to the countries of the Mediterranean. One out of five research participants reported having used illegal drugs at least once in the preceding 12 months in their home country (12% cannabis and 8% other medicines). One in ten reported the use of illegal drugs during the holidays. 87% of the research participants used marijuana, 32% ecstasy, 18% cocaine, 6% ketamine, 6% amphetamine and 4% gamma-hydroxybutyric acid (GHB). The frequency of drug use varied depending on the place of travel. Alcohol was used by almost all campers (95%). 78% of British citizens and 61% of Germans were drunk at least once during their stay. In addition, 45% of British citizens and 24% of Germans reported having been drinking for at least half of their stay.

The *Drugs and risk-taking in tourism* research conducted among people practicing the so-called drug tourism provided interesting results in this area (Uriely and Belhassen 2006). Uriely and Belhassen point out that "the majority of travelling drug users hold a belief in an «invulnerable tourist». They are convinced that a country where «one lives on tourism», will not undermine their own economic foundations (Synowiec 2015). As a result, they are convinced of the silent consent of the local law enforcement agencies, remaining unaware of the consequences resulting from their breaking the existing law. For the most part, they are also unaware of the social harm done by such behaviours to the local environment of tourist resorts such as, for example, the emergence of pathologies, increase in crime, passing on patterns of foreign behavior to a given community. Research participants also held the belief that "the risks associated with their practices are lower when those practices are realized in the context of tourism than in their daily lives" (Uriely and Belhassen 2006, 340).

Tourists expect that their "disobedience" will be accepted on the grounds of their own carelessness, ignorance of the rules or recklessness resulting from their concentration on experiencing impressions. At the same time, they acquit themselves on the grounds of the shortness of their stay which prevents them from getting acquainted with and understanding the local patterns of behavior, and thus, intentional violation of the rules observed in a given social space. In other words, tourists deny the possibility of having a real impact on the local community and, at the same time, demand recognizing the principle that a person's lifestyle is the matter of their own choice.

5. The Sphere of Freedom in Tourism

No society seems to recognize absolute freedom, perceiving the threats posed to its existence by various patterns of behavior. The world of tourism presents, therefore, specific "destinations of freedom", directions of tourist traffic offering various types of goods. The more their character approaches border experience, the fewer places will offer them. It is worth noting that allowing one type of border freedom does not automatically mean acceptance of their full package.

Tourists' safety requires awareness of this state of affairs, just as the ability to recognize the border between the official and unofficial consent. Margins of freedom set by the local community for its members and for "strangers" do not have to be symmetrical. What is acceptable for tourists may be intolerable with regard to residents. Natives do not have to practice tourist behavior to accept or tolerate them. Tourists are a temporary presence that has no permanent impact on residents. However, one cannot predict the effects of contact with otherness. Even temporary and passing presence of tourists can expose the local inhabitants to attractive patterns of behavior, which will be accepted by them and adopted on a daily basis, changing the character of their locality.

Tourism allows access to goods that are inaccessible to people in the space of their locality, thus urging them to abandon it. It is a temporary act that assumes return to the place of living. Travelling, in general dimension, does not provide a pattern of everyday behavior, it takes place in free time and is conceived of as a break in daily human existence. Return to everyday life means reintegrating tourists in the social space of the locality and in the structure of the world of values which they "abandoned" when setting on the journey, although they may return "transformed" and filled with a new axiology. Therefore, they will either experience a moment of "succumbing", returning to the normative system from which they physically "released" themselves for the time of the journey, or face a conflict of axiology, which will mark them with the stigma of otherness in the reception of the local environment.

Sanctions conditioning the functioning of a given community also belong to this normative construction. The degree to which tourists internalize the norms and patterns of behavior to which they were socialized by their locality, determines whether they leave those value structures behind them in their everyday life environment, or "take them" with them on the journey. Each contact with the other constitutes an axiological discourse with an unpredictable conclusion.

6. Limits of Freedom from the Local Perspective

Human life in its basic dimension takes place in the space of a given local environment. Locality sets the boundaries of peoples' activities and offers forms of satisfying their needs. The local community provides a point of reference for the choices that people make during their lives, for the perception of individual freedom and for defining boundaries. It introduces them to the behavior patterns appropriate for a given culture, which they themselves represents, shows the values and hierarchies of these values that are important for people and their cultural area. It presents accepted, boundary, unaccepted and forbidden behaviors. It also plays an informal role of social control, formulating judgments commenting or evaluating the conduct of an individual. These judgments express a kind of relationship between human behavior and the interests of a given social group (Jankowski 1979, 12).

The limits of freedom are determined by moral, legal and social norms defining acceptable or forbidden behaviors, complemented by patterns of behavior expressing the group's reaction to transgressing these norms which takes the form of sanctions. Moral sanctions seem to come to the fore here as they antecede appealing to institutional sanctions set by legal norms. These include: negative evaluation of conduct, deprivation of rights for a certain period of time, being ignored by the group, exclusion from the group (Jankowski 1979, 140). Application of informal sanctions assumes a permanent presence of the individual, the object of these sanctions, in a given social space. The sanctions are aimed at preventing undesirable effects of certain behaviours and at formulating a clear message regarding their unacceptability. In the case of tourists, informal sanctions do not

find any application, since it is unrealistic that tourists' behavior could be censured by a given community. In general, tourists are isolated from such a community, since they are separated by a language barrier which hinders or even prevents mutual communication, and thus makes it impossible for that community to formulate assessment of a particular behavior and to impose informal sanctions on tourists. The degree of both subjects' language proficiency may have an impact on the scale of such cognitive dissonance, but this is not the question of its subject matter but of the clarity of the moral structures conveyed in the message. The community will not deprive tourists of their rights, due to the fact that sanctions constitute a reaction to unacceptable behavior expressed post factum, therefore, the moment of its manifestation comes when the subject to whom it is addressed is already absent and, in all likelihood, will never again appear in the space of this community. They will not be excluded from the group, because they do not belong to it, and their being ignored will not be understood by them as a message of censure addressed at their behavior, since, they will, just as ignored consumers, continue their journey in search of goods that they want to acquire. Assessment of behavior formulated by the local community will not have an existential meaning for tourists. Institutionalized sanctions may provide the sole clear message for tourists.

Travelling is a temporary state for tourists, a kind of "free time play". The association of free time with play goes back to Schiller's consideration of play as a form of manifesting humanity (Schiller 1972). Callois perceived play as a form of practicing human freedom with a strong autotelic emphasis and a ludic tendency to surpass the borders, typical of the cultural structure of the carnival (Callois 1973). The practice of tourism seems to be a form of play that Huisinga defined in *Homo Ludens*, when he stated that "Play is a voluntary activity or occupation executed within certain fixed limits of time and place according to rules freely accepted, but absolutely binding, having its aim in itself and accompanied by a feeling of tension, joy and the consciousness that it is «different» from «ordinary» life" (Huisinga 1985, 48).

The mood of play, the emotions associated with it, the attitude to pleasure, voluntary choice in free time, the relationship with time and space, and exclusion from daily life, indicate the structural similarities of these two forms of human activity. Contemporary civilization of consumerism considers fun, as Bauman (1993) and Ritzer (2001) emphasize, as human duty, which in the long-term, has atrophic properties with regard to the sphere of people's sensations.

7. The Limits of Freedom and the Issue of Sanctions in Tourism

An individualistic and non-enclavic form of border tourist practice will usually be located in the most anonymous space of a big city.

The urban community, due to the size of the population creating it and a high degree of anonymity and social diversity, will be characterized by the weakening of informal sanctions in favor of the strengthening formal sanctions. At the same time,

it will develop semi-legal and illegal institutions serving the needs of individuals, both locals and visitors. Strengthening formal sanctions is a threat to tourists who violate protected values, as is the case of drugs. Communities that set very wide margins of freedom, for example for the sexual needs of tourists, can at the same time demonstrate unwavering principles on the issue of drugs. Sexual openness can be the sign of a liberal attitude, which does not have to be accompanied by tolerance towards social disobedience presented by tourists who strengthen their sensations with forbidden stimulants.

The world of tourism invariably reveals a peculiar civilizational disparity. It is the rich, rather than the poor who travel the most and, among those, it is representatives of Western civilization who dominate over other cultures. This disproportion is emphasized by Podemski, who states that: "the need to seek new experience by wealthy people drives the development of the tourism industry" (Podemski 2005, 100). This situation reflects the sense of superiority that characterizes representatives of the "white man" culture reinforcing a new kind of tourist neo-colonialism. Civilizational affiliation is to guarantee more freedom and impunity in the "Third World" countries.

The post-modern culture shaping the contemporary Western civilization is also changing the perception of tourists who become a metaphor of human social condition. The social positioning of the tourist entity itself is also changing. As Bauman contends, it evolves from the model of a pilgrim seeking value in the world's space to a stroller, player, tramp, and a tourist seeking fulfillment in experiencing pleasures: "A tourist leaves home looking for experience (...) which he does (...) of his own will (...) The tourist pays, the tourist demands" (Bauman 1993, 25). High social position produces a conviction that tourists are entitled to the margins of freedom, according to the saying "Who can deny the rich?" As Hobbes points out, freedom cannot have an absolute meaning and must be comprised within the limits of the law (Hobbes 1956), but tourism practice allows a person to move between different legal systems and abide by it while satisfying their needs. If freedom, as Moore argues, is a manifestation of an individual's right to decide for themselves (Moore 1980), then it is obviously linked to the freedom of choice, even if it ultimately turns out to be wrong, harmful or unacceptable. People also bear responsibility for their choices and the consequent acts, including this tragic sense of responsibility that comes from the impossibility of predicting the effects of one's choices (Sartre 1998). Freedom realized in the acts of choice is a "subjectively-experienced project", because man is characterized by a subjective sense of freedom (Berlin 1991). In this approach, freedom is characterized by heroism resulting from the impossibility of predicting the effects of human acts with the simultaneous imperative of incurring their consequences.

The needs realized through the practice of tourism could be divided with respect to their social reception, universality and type of sanctions, into: behaviors not practiced in a given community, such as: extreme sports, gambling, naturism;

behaviors unacceptable in a given community, such as: drugs, homosexuality, group sex, gender reassignment, and behaviors prohibited in a given community, such as: euthanasia, abortion, sex with minors. The three categories are not fully disparate due to cultural differences that result in including or excluding certain types of behavior from a given category depending on the patterns of behavior and the type of sanctions accepted in a community. Unacceptable and forbidden behaviors differ with respect to the nature of sanctions. Legal sanctions are applied in the case of prohibited behaviors, while unacceptable behaviors will induce application of moral sanctions, except for situations when "unacceptable" is a euphemism referring to "forbidden". Social pressure exerted on the authorities, media messages aimed to create the image of acceptance by showing forms of practicing certain behaviors, can lead to changes in the system of behavioral norms and imposed sanctions, as in the case of trading marijuana in California in the USA. It may also refer to existential human needs regarding euthanasia, abortion, gender reassignment or popularization of transplantation practices.

This cultural asymmetry is the area of the discussed tourist type's activity. Considering the differences in motivation, needs realized through tourism could be defined by differentiating the categories of needs into hedonistic needs, lifestyle related needs and existential needs, and with reference to such categorization assign the status of behaviors: unpracticed, unaccepted and forbidden. The above presented type of the Dionysian tourist is a fairly good reflection of behavior aimed at fulfilling a person's hedonistic needs, such as the freedom of sexual practices, the need for intoxication and identity loss offered by alcohol and drugs, as well as lifestyle related needs, such as self-expression by manifesting one's carnality, experience of extreme sensations, possible through naturism, extreme sports, gambling. Illustration of behaviors inspired by human existential needs would require distinguishing the type of existential tourists satisfying their needs through the act of traveling, as in relation to abortion practices, gender reassignment and euthanasia, as well as the category of medical treatments not provided in a given community.

Conclusion

Travelling has always provided an opportunity to obtain goods unavailable in tourists' environment. In the times of market globalization, all kinds of goods that meet people's daily needs can be purchased through trade transactions without the necessity of embarking on a journey. Consequently, the motives behind traveling have lost their instrumental function in favour of the autotelic one. Travelling, as a way of human self-fulfillment, will still be treated as an medium of gaining access to practices inaccessible in the locality of the traveler. As long as there exists an intercultural asymmetry of ethical structures, travelling directions will lead from the world of prohibitions towards the areas of alleged freedom, i.e. to the world free of those prohibitions.

The analyzed type of Dionysian tourists seek both the forbidden and the allowed goods. They look for a space allowing them to practice prohibited behaviors in destinations where they are allowed, which is possible due to the differentiation of human moral practices and heterogeneity of forms of human civilization. The ubiquitous social stratification resulting in disharmony of poverty and wealth, creating divisions between the elites and the socially excluded, will enable the supply of all goods desirable and sought by modern man. The laws dominant on the contemporary market and the attitude of consumerism bring people to assigning market quality to all kinds of goods. Many of these goods are offered by communities that are weaker in terms of civilizational development, although just as many are available in communities with different structures of the legal sanctions systems, manifesting the differences in the world of values. Seeking tourist attractions available through the practice of traveling induces people to offering goods which are forbidden elsewhere. Such offers, emerging in result of pushing the limits of acceptable behavior, provoke man to take a step towards the "forbidden fruit". In the physical aspect, the spheres of morality can be separated by the real border of one step made by man moving momentarily from the world in which a given practice is forbidden, to the world in which it is allowed.

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THE ROLE OF RECREATIONAL ACTIVITY
IN CREATING SUCCESSFUL AGING

Abstract

In recent years we have observed rapid aging of societies. An important role in maintaining high quality of life as regards seniors is played by proper medical care as well as physical and mental activity. The aim of the present research was to determine the role of participating in organized forms of recreational activity in the process of successful aging. The conducted research was based on a questionnaire and it involved 64 participants of a recreational and sports event, Seniorada, addressed to seniors and their relatives. The findings have shown that recreational events play an important role in the process of integrating the seniors' environment, promoting entertainment and physical activity and, moreover, they help the elderly acquire new skills and improve well-being.

Keywords: recreational activity, physical recreation, successful aging

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ROLA AKTYWNOŚCI REKREACYJNEJ
W KREOWANIU POMYŚLNEGO STARZENIA SIĘ

Abstrakt

W ostatnich latach obserwuje się szybkie starzenie się społeczeństw. Istotną rolę w utrzymaniu wysokiej jakości życia seniorów pełni zarówno odpowiednia opieka medyczna jak i aktywność fizyczna i umysłowa. Celem badań było określenie roli uczestnictwa w zorganizowanych formach aktywności rekreacyjnej w procesie pomyślnego starzenia się. Zbadano 64 osoby – uczestników Seniorady – imprezy rekreacyjno-sportowej skierowanej do seniorów oraz ich bliskich. Do celów badań wykorzystano kwestionariusz ankiety. Wyniki badań wykazały, że imprezy pełnią ważną rolę w procesie integracji środowiska seniorów, sprzyjają rozrywce, aktywności fizycznej, zdobywaniu nowych umiejętności oraz poprawie samopoczucia.

Słowa kluczowe: aktywność rekreacyjna, rekreacja ruchowa, pomyślne starzenie się

INTRODUCTION

Rapid economic development that has taken place in recent decades and which has resulted in improved nutrition standards, increased coverage of basic health care and elimination of many infectious diseases has brought about population growth and increased percentage of people reaching an advanced age. Consequently, societies have undergone the process of rapid aging. Pursuant to the UN research, the world's population in 1950 included about 200 million people aged 60 and over. By 1975, their number increased to 350 million. It is forecasted that, by 2050 that number can reach 2 billion. This trend is particularly noticeable in developing countries, where the number of elderly people may increase by as much as 400% in the next 50 years.

In the face of the changing age structure of societies, including the Polish society, it is necessary to counteract and prevent discrimination and exclusion of elderly people from social life. The UN, has laid down a basic set of principles as regards acting for the benefit of the elderly. The crucial guidelines include: maintaining independence and dignity by the elderly as well as the right to proper care, self-fulfillment and participation in social life. The UN document refers also to sharing the knowledge and experience of elderly people with younger generations as well as to opening up for them possibilities of working as volunteers in positions consistent with their interests and predispositions. Elderly people have the right to care provided by their families and communities as well as to preventive medical care, moreover, they must be helped in maintaining or regaining optimal levels of physical, mental and emotional activity. Such persons are also entitled to rehabilitation, social and mental activation, as well as to educational, cultural, spiritual and recreational resources of societies (UN 2017).

In a letter to the participants of the Second World Assembly of Societies devoted to the problems of population aging, Pope John Paul II writes about the need and obligation to consider the elderly in the light of their human dignity, which does not diminish with the passing years nor with the deterioration of their mental

and physical condition. Society's task is to overcome the prevailing stereotypes, "which judge a person's worth on the basis of youth, efficiency, physical vigour or perfect health. Experience shows that when this positive view breaks down older people are quickly marginalized and condemned to a loneliness which is a kind of social death" (John Paul II 2002).

In the face of the above, it is necessary to modify the social policy towards the elderly in order to guarantee them a dignified life during retirement, as well as to change the image of older people in society. An important, though not yet sufficiently popular in Poland way to improve the quality of the elderly's life[5] is to encourage them to undertake systematic physical activity (Kolanowski, Fick and Buettner 2009).

1. Successful Ageing and Recreation

Aging is understood as a process beginning in childhood, while old age is considered a stage or a state in human life. Biological aging is defined as a process of progressive, regressive and irreversible changes in the tissues and organs of the body, determined by genetic factors and modified by coexisting diseases, lifestyle and environmental factors. This leads to a decrease in the physiological adaptability, increased susceptibility to diseases, and finally to death (Duda 2012). Optimal modification of aging factors allows to maintain the body's homeostasis and enables successful aging (Błędowski 2012). The term successful aging was first used by Robert Havighurst and Ruth Albrecht in 1953 (Halicki 2005). In the end of the twentieth century, it became one of the basic gerontological categories and it is now defined as aging with a low risk of developing chronic diseases (cardiovascular disease, diabetes, cancer) and subsequent infirmity, with high mental and physical fitness and sustained life activity (Laskowska-Szcześniak and Kozak-Szkopek 2013). The literature on the subject of successful aging mostly focuses on initiatives that promote autonomy and independence in the lives of elderly people.

Apart from proper medical care, an important factor in the process of preventing diseases and maintaining active live is recreational activity (Rottermund, Knapik and Szyszka 2015). It seems to perform a special role as it provides a basis for functional capacity of the elderly, and thus influences their health and independence (Petsche 2014, Novek et al., 2013). It cannot be levelled with other types of activities undertaken in leisure time[6], because what is indispensable

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[5] Quality of life is a person's feeling with respect to their position in life in defined cultural conditions and against the background of the adopted system of values in which a particular person operates, with the determination of their interests, standards, achievements and, what is very important, expectations. Behaviors can be assessed on the basis of observation and interview with old people and/or by using a research tool. Questionnaires are most often used. WHOQoL-100 i WHOQoL-BREF (Rottermund, Knapik and Szyszka 2015).

[6] Leisure time is generally understood as time devoid of duties, devoted to any freely chosen activities (Gosik 2015). Bywalec and Rudnicki (2002) define it as a total amount of time in the scale of a day, week, year or life, reduced by the time of work and the time of satisfying the necessary physiological needs, i.e., in a broad sense, time outside of work.

must not be equated with what is desirable. According to specialists in the field of gerontology, people giving up physical activity are much more often prone to processes accelerating aging than seniors who lead an active lifestyle (Kozdroń 2006). Therefore, physical activity plays an extremely important role in delaying aging processes and protecting health. It also allows older people to remain self-reliant and independent from their families or social organizations. Improving physical activity is one of the most important and effective ways of preventing and eliminating health problems in old age (Baranowska 2013, Kozdroń and Leś 2014).

There is a clear relationship between leisure activities and the quality of life. Many researchers point to a significant impact of active forms of spending free time on maintaining good mental and physical health (Gosik 2015; Singh and Kiran 2013), therefore, organization of free time is an important element of rehabilitation and care for sick, disabled and elderly people. As illustrated by research, physical activity is not a popular way of spending free time by older people in Poland (Rodzina.senior.pl 2017). The majority, namely, 60% of respondents (people between 60 and 80 years of age) watch television in their free time. At the same time only 16% go on trips, 4% walk and 1% practice sports. Organization of leisure time for seniors should aim at creating conditions that would allow them have the sense of fulfillment and integration in the society. Internal motivation of seniors and their readiness to participate in recreation is an important factor here. It is worth remembering the existing psychological patterns that accelerate integration processes with society. Adopting an individual approach is an important condition of selecting activities adequate for seniors, those which could prevent them from concentrating too much on their problems or pain. Combining alternatively physical and mental activity whose intensity will increase according with the improvement of the senior's general condition is also a practical and effective action. When working with an elderly person (providing it is financially possible), it is worth investing in special devices and utensils that facilitate mobility, communication or orientation. Individual seniors' condition (sight, hearing, mobility) as well as individual needs must be taken into account and the equipment must be chosen accordingly. Knowing about the poor health condition of elderly people, it is necessary to organize activities in such a way as to adapt their length and the intervals between them appropriately. There is a variety of offers as regards rehabilitation activities and new ones are still appearing (Dąbrowski 2006).

2. RESEARCH METHOD

2.1. Subject and Aim of Research

The conducted research investigated the phenomenon of successful aging and its relation to the undertaken recreational activity. It aimed at determining

the role of participating in organized forms of recreational activity in the process of successful aging. The authors formulated the following research questions:

   - Does participation in organized recreational events influence integration in the seniors' environment?

   - With whom do seniors most often participate in organized recreational events?

   - Does participation in events have an impact on the strengthening of family ties?

   - What are the main motives for the participation of seniors in organized recreational events?

   - Does participation in Seniorada according to the respondents allow them to acquire new skills?

   - Does participation in organized forms of recreational activity improve the respondents' well-being?

2.2. Research Participants, Research Tools and Procedure

   The test group comprised 64 people - participants of the Warsaw edition of Seniorada, a recreational and sports event addressed to seniors, and their relatives. The study involved 50 women and 18 men aged 68 on the average.

   The diagnostic poll method and participant observation was used in the research. The main technique was a survey and the tool was a self-elaborated questionnaire containing closed questions on various aspects of participation in an organized form of recreational activity and a data sheet with respondents' particulars. The questions were evaluated on a five-point Likert scale.

   The research was carried out in June 2017, during the Warsaw edition of the recreational event - Seniorada, which took place at the University of Physical Education in Warsaw. Targeted selection was used - people who expressed their willingness to participate in the survey, completed a survey during the event or immediately after the event.

3. Research Findings

   The following section presents the research findings obtained on the basis of the completed surveys. Figure 1 illustrates the respondents' answers with regard to the impact of the event on their integration in the seniors' environment. Over half of respondents expressed the opinion that the impact of the analyzed event on the level of their integration in the environment of people of similar age was very good and good. The second most popular answer chosen by respondents was that the impact was satisfactory. No respondent chose "negative" with reference to Seniorada's impact on their social integration.
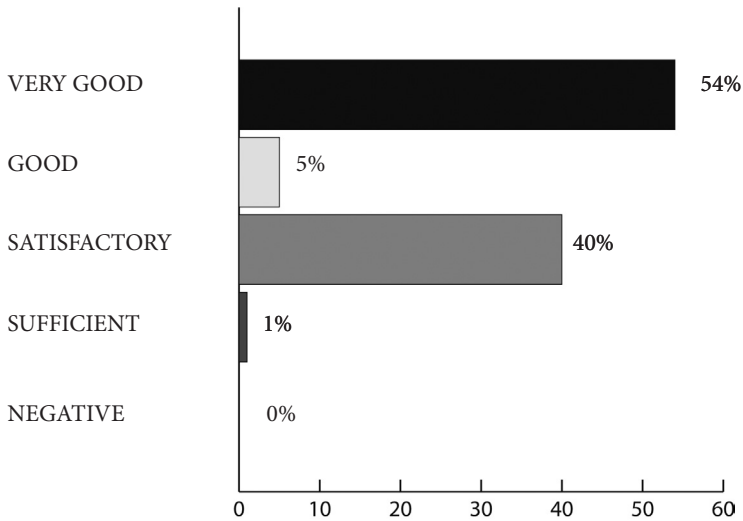
Fig. 1. Subjective assessment of Seniorada's influence on the respondents' integration in the environment of seniors.

Figure 2 portrays the percentage of people with whom the surveyed seniors most often take part in recreational and sports events. Over half of respondents replied that they most often took part in such events with friends, almost 1/4th of respondents selected husband/wife/partner, a comparable number of seniors indicated the Pensioner's Association or children and the smallest group said they took part in such events alone.
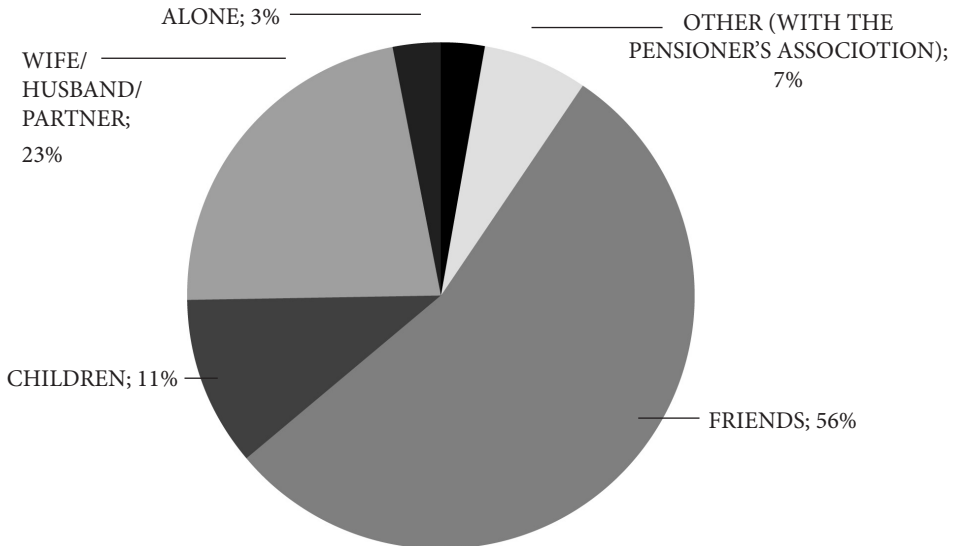
Fig. 2. People with whom seniors most often take part in recreational and sports events.

Figure 3 refers to the question whether participation in Seniorada influenced the strengthening of family ties. On the basis of the research it can be concluded that for more than half of respondents, participation in a recreational event was not associated with the improvement of family relationships. One third of them declared that Seniorada had a positive impact on this aspect of their life.
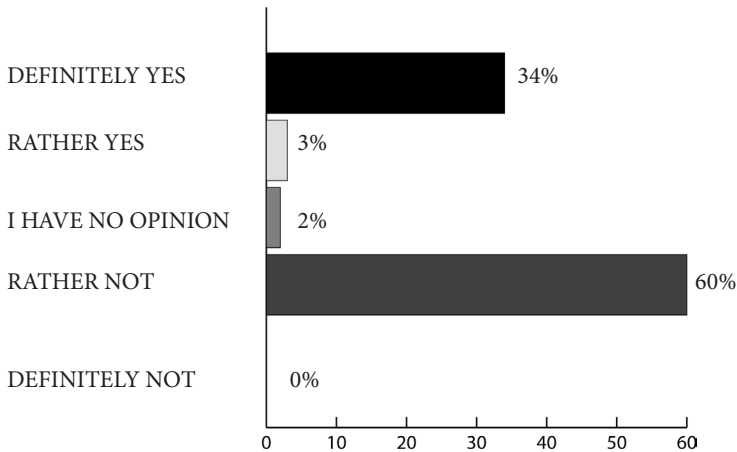

Fig. 3. Influence of participation in Seniorada on strengthening family ties.

Figure 4 shows what motivation prompted the respondents to participate in the recreational event. The majority of them replied that important factors in making the decision to participate in Seniorada included: improvement of/maintaining health, entertainment, seeking new experiences, seeking contact with nature, making new acquaintances, meeting people of the same age, opportunity to test themselves. More than half of respondents replied that spending time with their family was also a very important factor.
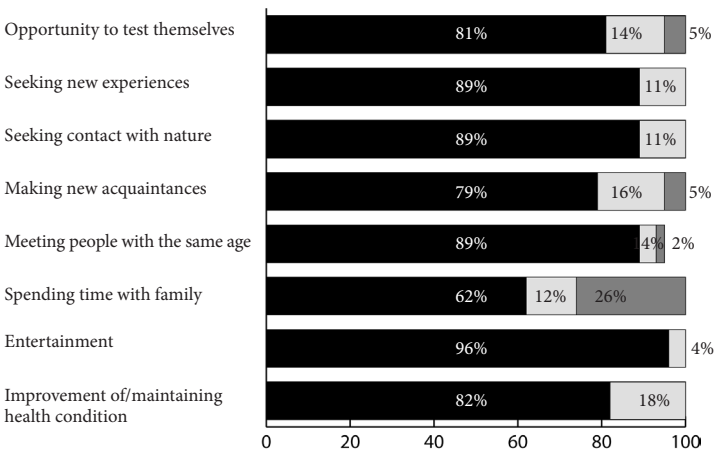

Fig. 4. Motivation behind participation in Seniorada.

The next figure presents the respondents' opinions on the impact that participation in Seniorada exerted on their gaining new skills (Fig. 5). Over half of respondents declared that participation a recreational event of that type allowed them to acquire new skills. Slightly over 1/3 of respondents did not consider such participation as a way for this type of development.
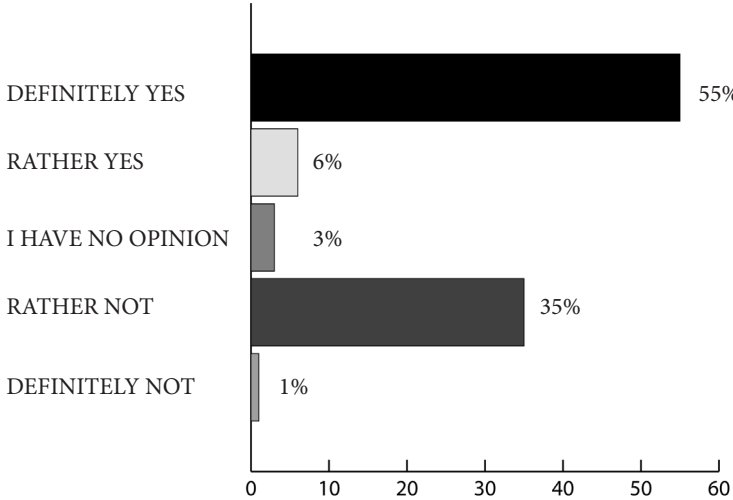

Fig. 5. Influence of participation in Seniorada on gaining new skills.

Figure 6 presents the percentage results regarding the impact of participation in the event on the well-being of the respondents. Over 3/4 of respondents replied that participation in Seniorada improved their mood, the rest declared lack of direct correlation between their participation in the event and their mental state.
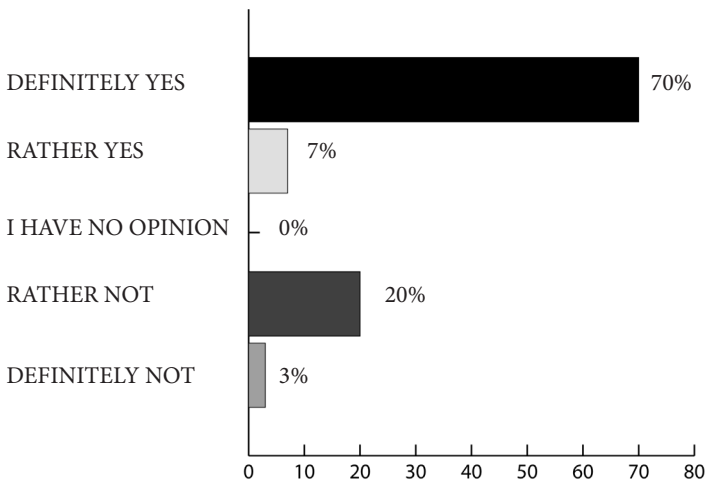

Fig. 6. Influence of participation in Seniorada on the improvement of well-being.

Conclusion

Aging of the human body is a natural process, and one of the most important challenges facing seniors is to maintain an adequate level of health. The key element which may contribute to successful aging and counteract the process is popularizing participation of elderly people in various forms of recreation (Kozdroń and Leś 2014). Appropriately selected physical activity is the most effective among the known ways of delaying aging processes. It is a factor of health preservation and, what is crucial in the case of the elderly, of mobility and extending the period of functional activity in everyday life (Kozdroń 2014).

The main purpose of the research presented in this article was to determine the importance of older people's participation in organized forms of recreational activity in the process of successful aging. The first research question concerned the impact of participation in organized forms of recreational activity such as Seniorada on strengthening social ties in the seniors' environment. The results of the conducted research have shown that such forms play an important role in making new acquaintances and in enhancing integration in the analyzed group. Perhaps, this is due to the fact that seniors feel a special need to spend time with people of similar age. This type of event has the advantage of bringing together a large group of seniors in one place. Time spent together allows seniors to break away from their daily duties, exchange information and experiences, relax and play together in a group of people in which they meet with mutual acceptance and support. This is confirmed in the responses provided by respondents who declared that they most often participate in organized forms of activity in the company of friends and life partners. It is worth noting that a large group of seniors did not consider participation in Seniorada as having a significant impact on the tightening of their family ties. This may be due to the fact that some of them spend more time with their children or grandchildren on a daily basis, and such an event is a great opportunity to meet friends with whom they have no regular contact.

Another question referred to the motives inspiring the elderly who take part in organized forms of activity. The research has shown that entertainment is the most important reason for such participation. This proves that seniors need to have a break from everyday life, to enjoy the fun and convivial atmosphere that prevails during such events. The seniors also pointed to the artistic aspect of the event, namely, stage performances and the possibility of singing and dancing together. Another important motive for participation was a desire to spend time with friends. Once again, the conclusion is that participation in such events as Seniorada provides the elderly with a chance to integrate with people of comparable age, having similar interests, which can certainly result in diminishing the sense of loneliness and social isolation.

Seniors also eagerly take up new challenges and prove themselves in new competitions, which are proposed during each edition. Thus, the event gives

them a great chance to spend leisure time in a creative, interesting way, since the organizers offer in their program a lot of attractions of a varied level of difficulty so that everyone can find something for themselves. This is confirmed by the results of research referring to the role of participating in the event in acquiring new skills by seniors. An important element here is, moreover, contact with nature. Senioradas are open-air events taking place at the Academy of Physical Education, near the Bielański forest. Thanks to that, the participants have a chance to spend time outdoors, which is especially valuable for people who do not have such an opportunity on a daily basis.

Lastly, the seniors were asked if participation in organized recreational and sports events improved their well-being. Most of respondents stated that those types of activities positively influenced their mental state. This highlights the important role played by various forms of recreational activity in health care both at the physical and mental level, which in turn is inductive to successful aging.

The results of the presented research prompted the authors to consider possible recommendations regarding forms of spending free time. The following is a list of forms of recreational activity advised for seniors, which, depending on their preferences and possibilities, may contribute to the process of successful aging.

A. Physical Activity, Tourism as Therapy

Physical activity positively affects both mental and physical condition of seniors. It is believed that tourism is easier for seniors than sport, and therefore it should be considered the first step towards systematic physical activity. In the face of growing numbers of people with psychosomatic diseases, adaptation crisis or disabilities, the role of tourism seems very important. It has a huge impact on improving the health of elderly people and, in the first place, counteracts hypokinesia (decreased bodily movement). Motor limitations lead to stress and depression, loss of self-confidence, while tourism provides an opportunity to counteract those types of negative phenomena. In order to use the benefits of tourism effectively, it is necessary to observe several principles, namely: the type of tourism must be selected depending on seniors' health condition, it must take into account their personal needs, financial possibilities and place of residence; neither tourists nor the environment should not be exposed to dangers; the program should include sightseeing; luggage weight (backpacks, etc.) should be adapted to the capabilities of older people. Seniors' striving to undertake active forms of spending free time contributes to their social adaptation, as opposed to passive forms of entertainment which lead to the general weakening of vital forces and increase social isolation (Kozdroń 2014; Singh and Kiran 2014).

B. Bibliotherapy

It is a form aimed at mental development. Seniors read books and discuss them together. This therapeutic activity often includes organization of literary

evenings, meetings with book authors, speed reading trainings and competitions. Literary philanthropists clubs and poetry clubs are created. Bibliotherapy has an impact on the shaping of seniors' identities, extending compensation opportunities, making interesting acquaintances with people sharing similar worldviews as well as on developing speech skills (especially in people with speech disorders). In literary examples seniors can find something positive that could make them happy. Literature provides opportunities that even the best and most experienced psychologist will not be able to give, namely, to learn to analyze and control their behavior and their reactions. Reading specially selected literature allows people to relieve tension and provides pleasure (Lach 2014; Borecka 2001).

C. Art Therapy

Art therapy comprises a variety of therapeutic activities performed with the help of broadly understood forms of art such as painting, sculpture, graphics and drawing. An important element in this type of activity is that the workshops participants do not need to have any particular artistic talents or creative experience in a given field. Their main goal does not consist in creating the best possible art object, but in using the creative process as a valuable and unique communication channel. Art classes can play a number of extremely important functions, such as stimulating the participants' activity, developing their inventiveness and prompting them to creative activity. They can also provide them with sensory stimulation or help them release and deal with any negative emotions. In addition to mental activation, which is considered one of the necessary conditions for healthy aging, art classes can contribute to the improvement of manual fitness, which decreases with age (Cylkowska-Nowak, Strzelecki and Tobis 2013; Tobis, Kropińska and Cylkowska-Nowak 2011; Rzemieniak 2000).

D. Music Therapy

Music therapy consists in the application of music and its elements (mainly sound and rhythm) in order to eliminate the symptoms of illness, introduce changes in individual functioning and improve people's contact with the environment. Music therapy for the elderly is a sphere of arterapeutic impact, which provides an opportunity to work with both healthy and sick people as well as with their social environment in specifically organized sessions. Music therapy is divided into active and receptive. The first consists in performing activities that require physical participation of seniors, such as movement accompanied by music, singing or playing instruments. In turn, the receptive music therapy mainly consists in listening to a certain type of music aimed at relaxation and rest.

Music, thanks to its properties, is an important therapeutic tool. It helps seniors maintain an optimal level of functioning in all areas of psychosocial life. It also allows them to adopt an active attitude to the inevitable process of aging and its natural consequences. As a result, music therapy contributes to stimulating

personal development and is essential for improving the quality of the elderly's life (Cylkowska-Nowak, Strzelecki and Tobis 2013; Brudek, Kierpal and Gamrowska 2015).

E. Garden Therapy

Garden therapy (horticultural therapy) is a process in which plants, gardening and the inherent relationship of man with nature are used as tools in therapeutic and rehabilitation activities. Works related to the cultivation of plants and garden care have a positive effect on the physical and mental condition of people performing them, as well as on their cognitive abilities and social relations. Therapeutic gardens allow both passive and active contact with nature. Gardening activities improve the functioning of the circulatory system, increase muscle strength and bone density, improve motor coordination and balance, stimulate the senses, reduce stress, anxiety and aggression. They constitute, therefore, a great therapeutic and rehabilitation tool that can improve the quality of life of older people, enabling them to rehabilitate in a safe and friendly environment of plants (Latkowska 2016).

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ORIGEN AS A SOURCE OF EVAGRIAN EIGHT PASSIONATE THOUGHTS[2]

Abstract

This study focuses on the question of if and in what sense Origen can be considered as the source of the Evagrian teaching of the eight passionate thoughts. Origen is his source in the indirect sense, as the terminological inspiration of particular passionate thoughts. Evagrius has taken over from the New Testament the three so-called fundamental passionate thoughts (gluttony, avarice and vainglory) and the limitation of their number to the eight principal thoughts. The description of cause-and-effect relationships between all eight passionate thoughts, both in the empirical order and in the spiritual struggle between the individual thoughts, is a personal contribution of Evagrius, based on his own experience and the spiritual direction of other monks.

Keywords: Evagrius Ponticus, Origen, eight passionate thoughts.

Orygenes jako źródło ewagriańskiej teorii ośmiu namiętnych myśli

Abstrakt

Artykuł koncentruje się na pytaniu, czy i w jakim sensie Orygens może być uznawany za źródło nauki Ewagriusza z Pontu na temat ośmiu namiętnych myśli. Z przedstawionych analiza wynika, że Orygenes może być uznany za źródło Ewagriusza jedynie w sensie pośrednim, jako inspiracja terminologiczna dla każdej z namiętnych myśli, gdyż tylko w jego pismach pojawiają się wszystkie terminy użyte przez mnicha z Pontu. Natomiast z Nowego Testamentu Ewagriusz przejął naukę o trzech źródłowych myślach namiętnych (obżarstwo, chciwość i próżna chwała) oraz ograniczenie ich liczby do ośmiu. Zaś sam opis wzajemnych relacji pomiędzy nimi, zarówno w porządku empirycznym jak też duchowej walki, jest osobistym wkładem Ewagriusza opartym na własnym doświadczeniu i duchowym kierownictwie innych mnichów.

Słowa kluczowe: Ewagriusz z Pontu, Orygens, osiem namiętnych myśli

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Introduction

Claire and Antoine Guillaumont in their *Introduction* to the treatise *Practicus* came to the conclusion that Origen was the source of a category of eight passionate thoughts of Evagrius, because only in his texts do all the terms present in the writings of the Pontian Monk appear (Guillaumont and Guillaumont 1971, 63-83). In my study written in Polish (Misiarczyk 2007, 134-135) I myself followed this opinion, but subsequent research led me to conclude that this statement was not exactly true. Guillaumont's proposal demands a certain correction and a detailed clarification as to the sense in which we can say that Origen is the source of the Evagrian category of eight passionate thoughts. In fact, the convergence of the terms for the description of the eight *logismoi* in Origen and Evagrius was only sufficient to explain the origin of their list, but not the whole category understood as cause-effect relationship, which is a personal contribution of Evagrius completely absent in Origen's writings. In this study I would like to more deeply explore the sense in which Origen can be considered a source of of Evagrian *logismoi*.

1. The Eight Passionate Thoughts

In *Practicus* 6 which, as we know, concerns the first stage of the spiritual life of a monk or ascetic practice, Evagrius wrote:

All generic types of thoughts fall into eight categories in which every sort of thoughts is included. First is gluttony, then fornication, third avarice, fourth sadness, fifth anger, sixth acedia, seventh vainglory, eighth pride. Whether or not all these thoughts trouble the soul is not within our power; but it is for us to decide if they are to linger within us or not and whether or not they stir up the passions (Sinkiewicz 2005, 97-98).

Ὀκτώ εἰσι μάντες οἱ γενικώτατοι λογισμοὶ ἐν οἷς περίχεται πᾶς λογισμός. Πρῶτος ὁ τῆς γαστριμαργίας, καὶ μετ'αὐτὸν ὁ τῆς πορνείας· τρίτος ὁ τῆς φιλαργυρίας·τέταρτος ὁ τῆς λύπης· πέμπτος ὁ τῆς ὀργῆς· ἕκτος ὁ τῆς ἀκηδίας· ἕβδομος ὁ τῆς κενοδοξίας· ὄγδοος ὁ τῆς ὑπερηφανίας. Τούτους πάντας παρενοχλεῖν μὲν τῇ ψυχῇ ἢ μὴ παρενοχλεῖν, τῶν οὐκ ἐφ' ἡμῖν ἐστι· τὸ δὲ χρονίζειν αὐτοὺς ἢ μὴ χρονίζειν, ἢ πάθη κινεῖν ἢ μὴ κινεῖν τῶν ἐφ' ἡμῖν.

(Guillaumont and Guillaumont 1971, 506-508).

The theory of eight *logismoi* is undoubtedly *piéce maître* in the ascetic doctrine of Evagrius and became the basis of the later category of the seven deadly sins in the Church's moral teaching (Stewart 2005, 3-34). According to Jerome (*De viris illustribus* 11) Genadius of Marseille was convinced that Evagrius had created or compiled the entire list of eight principal passionate thoughts: *Evagrius monachus (…) scripsit (…) adversus octo principalium vitiorum suggestiones, quas aut primus advertit aut inter primos didicit (…)*. A more accurate analysis of

ancient sources suggests that our monk did not invent the whole category itself, but rather systematized the teaching of earlier Christian and pagan authors. However, when we ask from where he had taken over the whole category of the eight passionate thoughts, we cannot indicate any specific author or group of people. Scholars studying Evagrian texts have proposed several hypotheses, but none of them found complete and exclusive acceptance. Let's now look at these hypotheses in detail.

2. The Possible Sources of the List of Eight Passionate Thoughts before Origen

At the end of the 19th century, Zöckler put forward an hypothesis followed also by other scholars, that the moral doctrine of the Stoics had influenced the catalog of the eight principle *logismoi* of Evagrius (Zöckler 1893; Wrzoł 1923, 385-404 and Wrzoł 1924, 89-91; Stelzenberger 1993, 379-396). According to this proposal, the eight passionate thoughts of Evagrius would have been taken over from Stoic teaching regarding four πάθη and four κακίαι. If we, however, compare four main passions in the system of Stoic ethics: ἡδονή, ἐπιθυμία, φόβος and λύπη and four principal *vitia:* ἀφροσύνη, δειλία, ἀκολασία, ἀδικία which are opposed by four virtues: φρόνησίς, ἀνδρεία, σωφροσύνη, δικαιοσύνη, we will very easily see that only the term λύπη is exactly the same as in the catalog of Evagrius. All others are completely different.

Stoic system	Evagrian list
ἡδονή	γαστριμαργία
ἐπιθυμία	πορνεία
φόβος	φιλαργυρία
λύπη	λύπη
ἀφροσύνη	ὀργή
δειλία	ἀκηδία
ἀκολασία	κενοδοξία
ἀδικία	ὑπερηφανία

Ireneé Hausherr and Claire and Antoine Guillaumont were right to reject the direct and exclusive influence of the Stoics on Evagrius and for different reasons (Hausherr 1933, 164-165; Guillaumont 1971, 73-75). Firstly, the Stoics call the passions πάθη and κακίαι, while the monk from Pontus, although he also used those terms, always used the term λογισμοί when talking about the eight passionate thoughts. Secondly, except for λύπη all other terms of the Stoics do not have counterparts in the catalog of the Pontian monk. So we cannot talk about the impact of Stoicism if almost all the terms in both lists are completely different.

At the beginning of the twentieth century, Schiwietz (Schiwietz 1906, 268-275) proposed *Epistula ad Maecenam* I 33-40 of Horatius as the source of the

Evagrian list of eight passionate thoughts, six of which correspond to the terms used by Evagrius:

> Fervet *avaritia* miseroque *cupidine* pectus:
> Sunt verba et voces, quibus hunc lenire dolorem
> Possis et magnam morbi deponere partem;
> *Laudis amore* tumes: sunt certa piacula, quae te
> Ter pure lecto poterunt recreare libello.
> *Invidus, iracundus, iners, vinosus, amator*,
> Nemo adeo ferus est ut non mitescere possit,
> Si modo culturae patientem commodet aurem.

This *Letter* is undoubtedly proof of the widespread reflection on the catalog of human faults in various circles, but one can doubt whether Horace was indeed the inspiration for Evagrius. First of all, the text is in Latin and Evagrius probably did not know that language. Secondly, even if the six terms present in the *Letter* would agree with those of Evagrius (*avaritia, cupidine, amor laudis, invidia, iracundia, inertia*), it is still difficult to ascertain the relationship between these authors as they have written in different languages. Thirdly, it is difficult to imagine the monks in the Egyptian desert reading the works of Horace. It is always possible, of course, that Evagrius was familiar with Horace's work in Constantinople or in Jerusalem, but it remains in the sphere of speculations very difficult to verify.

Some scholars have proposed the astral religion as the source of the catalog of eight passionate thoughts in Evagrius (Reitzenstein 1904, 232-238; Zielinski 1905, 437-442; Gothein 1907, 416-448; Schiwietz 1906, 266-274; Wrzoł 1923, 385-404 and Wrzoł 1924, 89-91; Vögtle 1941a, 217-237; Bloomfield 1952, 43-67). According to the gnostic theory, when the *demiourgoi* wanted to create the material world, they first created seven evil spirits (*archontoi*), who became guardians of each of the spheres of the emerging world and would symbolize one single defect. When the soul after its fall was forced to merge with matter, descending into the earthly world it had to go through all these spheres, taking on the characteristics of each of these defects. If it now wants to be free from the present state, it must rediscover its path, freeing itself from the power of the seven demons responsible for the seven spheres and defects (Guillaumont and Guillaumont 1971, 79-82). The traces of similar beliefs about the existence of planets or spheres, which are evil powers are found in the *Commentary to Eneida* VI, 714 of Servian and the *Book of Enoch* 18:13. In the first text the author emphasizes that *Mathematici (= astrologers) fingunt quod (…) cum descendunt animae, trahunt secum torporem Saturni, Martis iracundiam, Veneris libidinem, Mercurii lucri cupiditatem, Iovis regni desiderium.* It is worth noting that five mentioned faults coincide with the catalog of Evagrius: acedia (*torpor*), anger (*iracundia*), impurity (*libidine*), greed (*lucri cupiditas*) and pride (*regni desiderium*), but have been expressed in other terms and in the Latin language. The author of the *Book of Enoch* seems to identify seven planets with seven evil spirits that have turned away from God. Again, however, similarities

are not sufficient to justify the influence on Evagrius of the mythological Gnostic theories. The fundamental difference regards the number of thoughts and technical terminology. In Evagrian texts we have eight spirits, but in the gnostic theory only seven. Proponents of the astral hypothesis were seeking more of an explanation of the source of origin for the later category of the seven deadly sins used in the Catholic Church than the eight passionate thoughts in Evagrius. Mike Bloomfield proposed to add to the seven celestial spheres one more in order to have eight, which in the gnostic theory would already be a kind of constant sky, but this is an unconvincing proposition (Bloomfield 1952, 61). Next, we find neither in the gnostic texts nor in the writings of the Church Fathers who have entered into polemics with them terminology close to the list of Evagrius. In short, the astral hypothesis as the origin of the list of principal thoughts of the Pontus monk is a product of the fantasy of scholars rather than their real source.

At the beginning of the twentieth century, Zarine suggested that the sources of the Evagrian list should be sought in the Egyptian monastic tradition. So he put forward the assumption that the monk of Pontus took over the category of eight passionate thoughts from Macarius of Egypt (Zarine 1907, 309-353). It is true that in Macarius' treatise *Prayer* among the passionate thoughts tormenting a monk are mentioned πορνεία and κενοδοξία, and in his *2 Spiritual Homily* κενοδοξία, ὑπερηφανία and φιλαργυρία, but the full Evagrian list is absent in these texts and some scholars still doubt that Macarius is the author of *Spiritual Homilies* (Hausherr 1933, 165).

Ireneé Hausherr proposed to remain in search of inspiration for Evagrius in monastic circles, especially in the text entitled *Life of Saint Syncletica*. The work, however, which as he himself admits is contemporary to Evagrius or written shortly afterwards, rather only confirms the existence in the monastic tradition of the teaching about passionate thoughts, since it mentions only four of them from the list of the monk from Pontus: πορνεία, φιλαργυρία, λύπη, ὑπερηφανία (Hausherr 1933, 173-175).

Other scholars in turn have proposed ancient and early Christian and Judaic texts as a source of Evagrian teaching on the eight *logismoi*. In the writings of Philo of Alexandria we find a very interesting fragment in *De opificio mundi* 79, in which appear some terms present in evagrian texts:

> And this will be so (= the life similar to that in Paradise) if irrational pleasures
> do not get control of the soul, making their assaults upon it through greediness
> (γαστριμαργία) and lust (λαγνεία), nor the desires for glory (ἐπιθυμίαι δοξῆς) or
> wealth (χρημάτων) or power arrogate to themseleves the control of the life, nor
> sorrows lower (αἱ λῦπαι) and depress the mind; and if fear, that evil counsellor,
> does not dispel high impulses to noble deeds, nor folly and cowardice and
> injustice and the countless host of other vices assail him
> (Philo Alexandrinus 1981, 65-66).

We have here expressions such as "irrational lusts" (ἄλογοι ἡδοναὶ), gluttony (γαστριμαργία, lasciviousness (λαγνεία) similar to impurity though expressed by another term, lust of glory (ἐπιθυμίαι δοξῆς) similar to vain glory, the desire for wealth (χρημάτων) close to greed, and sadnesses (αἱ λῦπαι). We cannot forget however, that there are only two of the Evagrian terms present in Philo's texts: γαστριμαργία and in plural αἱ λῦπαι. Others are lacking and the direct influence of Philo on Evagrius in this regard is rather doubtful.

Among the Qumran texts, and specifically in the *Rule of the Community*, we find a very interesting fragment:

> However, to the spirit of deceit belong greed, sluggishness in the service of justice, wickedness, falsehood, pride, haughtiness of heart, dishonesty, trickery, cruelty, much insincerity, impatience, much foolishness, impudent enthusiasm for appalling acts performed in a lustful passion, filthy paths in the service of impurity, blasphemous tongue, blindness of eyes, hardness of hearing, stiffness of neck, hardness of heart in order to walk in all the paths of darkness and evil cunning (The Rule of Community 1999, 77-78).

In the text, as we can easily see, we find six terms that are similar to those in the Evagrian list: greed, sluggishness very similar to acedia, pride and haughtiness, anger and a spirit of lustful passion. Even the analysis of the Hebrew terms is not going to bring much clarification here because the thoughts or spirits in the *Rule of the Community* do not form a catalog of eight passions as in the texts of Evagrius, but these six are mixed with many others. And last but not least, Evagrius certainly did not know the Hebrew language so it is impossible that he would have been inspired by a Qumran text like the *Rule of the Community*.

In the Greek text of the *Testament of Ruben*, which belongs to the *Testaments of the Twelve Patriarchs*, we find a fragment regarding seven spirits of error:

> With these spirits are mingled the spirits of error (ἑπτὰ τῶν πνευμάτων τῆς πλάνης). First, the spirit of fornication (τὸ τῆς πορνείας πνεῦμα) is seated in the nature and in the senses; the second, the spirit of insatiableness (ἀπληστεία γαστρός) in the belly; the third, the spirit of fighting (μάχη), in the liver and gall. The fourth is the spirit of obsequiousness and chicanery (ἀρέσκεια καὶ μαγγανεία), that through officious attention one may be fair in seeming. The fifth is the spirit of pride (ὑπερηφανία), that one may be boastful and arrogant. The sixth is the spirit of lying (ψεῦδος), to practice deceits and concealments from kindred and friends. The seventh is the spirit of injustice (ἀδικία) with which are thefts and acts of rapacity, that a man may fulfill the desire of his heart; for injustice worked together with other spirits by taking of gifts. [And with all these spirit of sleep (ὕπνος) is joined which is (that) of error and fantasy] (Charles 1964, 297-298).

It is very interesting to note that we have here a very similar list of eight spirits to Evagrius. However, only two Greek terms, πορνεία and ὑπερηφανία are exactly the same and the third ἀπληστεία γαστρός is close to γαστριμαργία but not identical. Some similarities of this list with Evagrius are obvious, but one can doubt whether the text of the *Testaments of Twelve Patriarchs* written in the Judaic *milieu* about 150 C. E. would have directly influenced Evagrius. As we know, the question of later interpolation both Judaic and Christian in the *Testaments of the Twelve Patriarchs* remains still open and widely discussed among scholars and for this reason it is difficult to propose the date for that fragment from the *Testament of Ruben*. The testimony of the *Testament of Ruben* is rather proof of the existence and development of the category of seven (or eight) evil spirits (or *spirits of error*) also in ancient Judaism and does not offer proof of its influence on Evagrius.

In the New Testament, we do not find, of course, the same list of eight passionate thoughts as in Evagrius or of seven deadly sins as in later Church moral teaching, but in the various texts there are three terms used by Evagrius: impurity (πορνεία), greed (φιλαργυρία) and pride (ὑπερηφανία). They occur in various configurations and with other terms in the following texts: διαλογισμοί πονεροί, πορνεῖαι (Matth 15: 19-20); ὑπερηφάνυς (Rom 1: 18-32), πόρνοι, πλεονέκται 1Cor 6: 9-10; πορνεία (Ga 5,19-21); πορνεία, πλεονεξία (Eph 5: 3-5); πορνεία, πάθος, ἐπιθυμία κακὴ, πλεονεξία (Col 3:5-8); πορνεία (1Tm 1:9-10), φίλαυτοι, φιλάργυροι, ὑπερηφάνοι (2Tm 3:2-5). This fact deserves to be emphasized because, as we know, it was these three temptations which Satan presented to Christ while he was tempting him in the desert, and, as we shall see later, Evagrius saw in them the source of the other five passionate thoughts. It is worth noting the slight difference between Evagrius and the New Testament: the monk of Pontus considered the third thought by which Christ was tempted to be vanity (κενοδοξία) and not pride (ὑπερηφανία). The New Testament was undoubtedly a direct inspiration for Evagrius in terms of the so-called three fundamental passions: gluttony, greed and vainglory that became the basis for the entire category of eight passions, but the whole category and the specific terminology may have been taken over from someone else.

The first Christian text in which a similar catalog of spirits/sins appears is *Shepherd* of Hermas. The text, as we know, was written between 140-155 in Rome and consists of 5 *Visions*, 12 *Commandments* and 10 *Parables* (Hermas 1991, 329-527). In this work, the *Fourth Commandment* deals with impurity (πορνεία), the Fifth with anger (ὀξυχολία) and the Tenth with sadness (λύπη). Very interesting is the fragment of the Sixth Commandment (36:5) in which there is an invitation to discern the spirits, that is to distinguish the action of the angel of righteousness from the angel of evil and to see in every sin the action of the demon. So when the evil demon acts, it raises "anger" (ὀξυχολία), spending money on "various utensils utterly superfluous" (gluttony!), incites "lust of women" (ἐπιθυμία γυναικῶν), "greed" (πλεονεξία) and "pride" (ὑπερηφανία) (Hermas 1991, 393). In the *Eighth Commandment* (38: 3-5) we find yet another catalog of evil deeds: "impurity"

(πορνεία), "gluttony" (ἐδέσματα πολλά), "greed" (πολυτελεία πλούτου πλεονεξία), "haughtiness" (ὑψελοφροσύνη), "pride" (ὑπερηφανία) and "vanity" (κενοδοξία) (Hermas 1991, 395-397). As we can see, the Shepherd, with the exception of acedia, mentions practically all other evil deeds: gluttony, impurity, greed, sadness, anger, vanity and pride. And while it often makes a descriptive statement with a different terminology than Evagrius, there are also four terms exactly the same as in his writings: πορνεία, λύπη, κενοδοξία, ὑπερηφανία. If we remember that in 2 Tm 3:2-5 greed is expressed by the term φιλαργυρία, then in the middle of the second century we would have the confirmation of technical terminology in the Christian texts for five of Evagrius' eight thoughts. Of course, this does not yet prove the direct dependence of Evagrius on these texts, but it shows us the development of the ancient Christian tradition in this regard.

Clement of Alexandria also described, though with another terminology, the four passionate thoughts: gluttony (ἡδονή τοῦ γαστρός/ἀσωτία), lust of women (ἐπιθυμία/φιλογυνία), vanity (φιλοδοξία) and pride (φιλαρχία) and also quoted a Stoic theory of four desires ἡδονή, ἐπιθυμία, λύπη and φόβος (*Stromata* II,20; IV, 6.). The terminology in this case, except for lu,ph is completely different from that present in the writings of Evagrius and so we can doubt on influence on the monk of Pontus.

Now, in order to see better the whole pagan, Judaic and Christian tradition before Origen, let's put together all the sources. We exclude the hypothesis of the influence of astral religion because it is too vague, *Epistula ad Maecenam* because it was written in Latin which Evagrius did not know and the texts of Qumran because Evagrius did not know Hebrew:

Evagrius	Stoics	Macarius of Egypt	*Life of St. Syncletica*	Philo of Alexandria	*Testament of Ruben*	New Testament	*Shepherd* of Hermas	Clement of Alexandria
γαστριμαργία				γαστριμαργία				
πορνεία		πορνεία	πορνεία		πορνεία	πορνεία	πορνεία	
φιλαργυρία		φιλαργυρία	φιλαργυρία			φιλαργυρία		
λύπη	λύπη		λύπη	αἰ λῦπαι			λύπη	λύπη
ὀργή								
ἀκηδία								
κενοδοξία		κενοδοξία					κενοδοξία	
ὑπερηφανία		ὑπερηφανία	ὑπερηφανία		ὑπερηφανία	ὑπερηφανία	ὑπερηφανία	

As we can see from this table, except for ὀργή and ἀκηδία all Greek terms used by Evagrius are already present in different pagan, Judaic and Christian texts before Origen. If we remember that in *Epistula ad Maecenam* appears the Latin term *iracundia* meaning "anger" and in Servian's *Commentary to Eneida* VI, 714 once again *iracundia* to describe anger, and *torpor* very close to acedia, even if those texts have not influenced Evagrius directly, they however confirm the existence of the widespread ancient tradition of many evil spirits or thoughts including all

eight Evagrian passionate thoughts. So if, as we shall see, only in Origen do we find all Evagrian terms for the eight λογισμοί, it is clear that the great Alexandrian just adopted earlier tradition and did not invent it. When we are talking about Origen as a possible source of Evagrius' eight passionate thoughts, we should then always keep in mind that he is less original since they were considered before and he just transmitted an earlier tradition.

3. Influence of Origen

There is no doubt that Origen was the first Christian author in whose texts all the Evagrian terms can be found. The great Alexandrian, however, has not presented yet a whole category of eight passionate thoughts in their mutual relation of cause-effect as Evagrius but only the single terms spread out in his texts. Since Origen referred to the various terms in different texts and on several occasions, it is worth presenting below a synoptic overview of the most important places in his writings compared with the catalog of Evagrius (Guillaumont and Guillaumont 1971, 69ff; Hausherr 1933, 168-169; Stewart 2005, 17ff.)

Evagrius	In Matthaeum Hom. XV,18	In Ezechielem Hom. 6,11	In Exodum Hom. 8,5	In Num. Hom. 27,12,1	In Iudic. Hom. 2,5	In Lucam Hom. 29; 30
γαστριμαργία						γαστριμαργία
πορνεία	ἐπιθυμία	fornicatio	fornicatio		libido	fornicatio
φιλαργυρία	φιλοπλουτία		avaritia	avaritia	avaritia	avaritia
λύπη		tristitia				
ὀργή	ὀργή	ira	ira	ira		
ἀκηδία						ὕπνος ἀκηδία δειλία
κενοδοξία	κενοδοξία	vana gloria	vana gloria	iactantia	iactantia	
ὑπερηφανία			superbia	superbia		
			invidia	inconstantia pusillanimitas	Et alia	

Evagrius	In Lib. Jesu Nave Hom.11,3	In Lib. Jesu Nave Hom.15,4	In Lib. Jesu Nave Hom. 15,5	In Lib. Jesu Nave Hom. 15,4	In Ierem. Hom. 2,10	In Ierem. Hom. 5,12
γαστριμαργία						γαστριμαργία
πορνεία	fornicatio	libido	fornicatio	concupiscentia	ἔρωτες	ἐπιθυμία
φιλαργυρία	avaritia	avaritia	avaritia			φιλάργυροι
λύπη				tristitia	λύπη	λύπη
ὀργή	iracundia		ira	ira	ὀργή	ὀργή
ἀκηδία						
κενοδοξία	iactantia	iactantia			κενοδοξία	
ὑπερηφανία	superbia	superbia	superbia			

As can easily be seen from the above table, in Origen's writings are present all the eight principal passions of Evagrius. In none of his texts is cited the whole list of eight passionate thoughts, but they are always scattered in different texts which means that he did not know the whole category as we have in Evagrian texts. Origen did not care too much about the order of individual thoughts, as their order is different in various texts. It is also worth mentioning that single thoughts appear only in Origen's homilies, that is, in the parenetic texts, not in any commentary or treatises. Hausherr is of the opinion that Evagrius drew on the number of eight passions from Origen's *Commentary to the Book of Deuteronomy* 7:1, in which he made an allegorical interpretation of the seven nations inhabiting the land of Canaan before the arrival of the Israelites, because this explanation is later given to us by Cassian. According to him the monk of Pontus would have taken over from Origen the names of the individual passions by giving them their own order (Hausherr 1933, 170). Instead, Claire and Antoine Guillaumont are convinced that Cassian's explanation sounds artificial and is rather intended to explain the list he himself had taken over from Evagrius rather than seek the origin of the list of the monk of Pontus (Guillaumont and Guillaumont 1971, 73). As a consequence, they also doubt that Origen's *Commentary to the Book of Deuteronomy* 7:1 was the only and direct inspiration for the Evagrian list of eight *logismoi*. In fact, Origen in his *Commentary to the Book of Deuteronomy* 7:1 presents seven pagan nations: the Hittites, the Girgashites, the Amorites, the Canaanites, the Perizzites, the Hivites and the Jebusites as „incorrigible sinners who had filled up the measure of their iniquities" and practiced idolatry, but he never uses any Evagrian Greek terms in this text. Hausherr and the Guillaumonts are of the opinion that Evagrius created his theory based on the teachings of Origen and the list of faults present in non-Christian literature, especially the Stoics. I personally doubt the influence of the Stoics since the only Evagrian term which appears in their texts is λύπη. It seems that the direct source of the whole list would be the New Testament, the Christian monastic tradition (Macarius of Egypt and *Life of St. Syncletica*) which confirms the knowledge of five Evagrian terms (πορνεία, φιλαργυρία, λύπη, κενοδοξία, ὑπερηφανία) and Origen. Adamantius, however, has not invented it but adopted earlier pagan, Judaic and Christian tradition which have already contained six of eight λογισμοί (γαστριμαργία, πορνεία, φιλαργυρία, λύπη, κενοδοξία, ὑπερηφανία) and added the next two (ὀργή, ἀκηδία) presented in earlier Latin texts. If Evagrius took over the list of eight passionate thoughts from Origen and Christian monastic tradition, he himself created the whole theory of eight λογισμοί, by precisely describing cause-effect relations between them, since he is the first author to present it in such a way. Let's now see in detail his order of eight passionate thoughts. Keep in mind that this aspect only seemingly does not connect to the main topic of this article; on the contrary, I think that it is crucial in answering the question about Origen as a possible source for Evagrius.

4. Order of Eight λογισμοι

Evagrius presents the list of eight passionate thoughts almost always in the same order: gluttony (γαστριμαργία), impurity (πορνεία), avarice (φιλαργυρία), sadness (λύπη), anger, acedia, vainglory (κενοδοξία) and pride (ὑπερηφανία), although sometimes he changes sadness with anger. In *De malignis cogitationibus* 1 he affirms that at first three main demons attack the monk: gluttony, greed and vanity:

> Among the demons who set themselves in opposition to the practical life, those ranged first in battle are the ones entrusted with the appetites of gluttony (γαστριμαργία), those who make to us suggestions of avarice (φιλαργυρία), and those that entice us to seek human esteem (κενοδοξία). (Guillaumont and Guillaumont 1971, 148; Sinkewicz 2005, 153).

In the same text he adds that the devil suggested the same temptations to Jesus, but was conquered by Him:

> For this reason the devil introduced these three thoughts to the Saviour: first, he exhorted him to turn stones into bread; then he promised him the whole world if he would fall down and worship him; and thirdly, he said that if he would listen to him he would be glorified for having suffered no harm from such a fall (Luke 4:1-13). But our Lord showed himself to be above such temptations and commanded the devil to 'get behind him' (cf. Matt. 4:10). Through these things he teaches us too that it is not possible to drive away the devil, unless we have shunned these three thoughts (Sinkewicz 2005, 153-154).

So we see that the key role in the creation of the list of eight passions for Evagrius was undoubtedly the description of the temptation of Jesus in the Synoptic Gospels. It is likely that it became the first inspiration for him in accepting the three basic so-called principal demonic desires that attack a monk: gluttony (γαστριμαργία), avarice (φιλαργυρία) and vainglory (κενοδοξία). The monk of Pontus, as he himself admits, drew the term λογισμοί, from Matt. 15:19 and also the number of eight spirits of evil from Matt. 12: 43-45 and Luke 11: 24-26, where Jesus explained that the unclean spirit, who is expelled from a man takes with him seven other evil spirits and attacks him again. And their concrete names he has taken over from earlier Judaic and Christian tradition and probably from Origen. According to Evagrius, there is a cause-and-effect relationship between single passionate thoughts: previous passionate thought gives birth to the next. Gluttony is the mother of impurity (*De octo spiritibus malitiae* 4) and one cannot fall into the trap of impurity unless he has fallen earlier by gluttony. If a monk wants to fight the demon of impurity, he should reduce the ration of bread and water, because it contributes greatly to temperance (cf. *Pr.* 17). The desire for food, wealth or human glory pushes, in turn, to be won by demons like anger and sadness:

> To put it briefly, no one falls into a demon's power, unless he has first been wounded by those in the front line (Sinkewicz 2005, 153).

When a man struggles to satisfy one of these three main passions and there is a real danger that he will not receive them, then he experiences anger. Sadness, on the other hand, appears in double form: as an experience of lack of satisfaction of desire or as an effect of anger. This twofold kind of sadness also explains why the monk of Pontus places it at one time right after avarice (*Pr.* 6), and at another time after anger (*Pr.* 10). If on the one hand the human soul experiences one of the concupiscible passions and on the other anger or sadness for lack of satisfying that desire, then it falls into the sixth passionate thought of acedia tearing the soul into two opposing directions. Evagrius sees acedia as a passionate thought that ends demonic attacks on the passionate part of the soul (concupiscible and irascible), since no other demon follows the demon of acedia (*Pr.* 12). Overcoming acedia closes the entire process of the action of passionate thoughts, which ends with the calming of the lust and the impulses of the soul of man. The last two thoughts, vainglory and pride, according to the order of following individual thoughts, are born after overcoming all previous six. Schematically, it could be represented as follows:
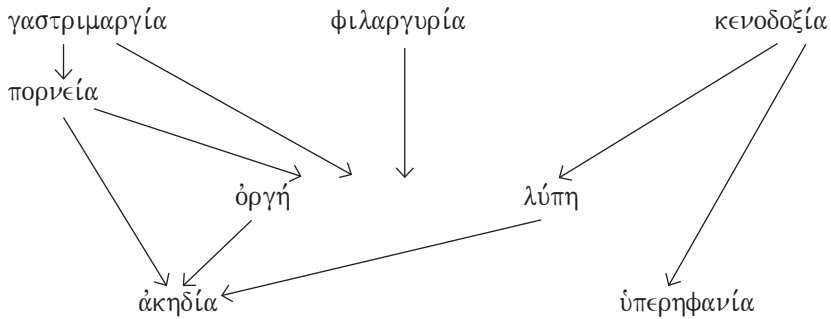
Although the Guillaumonts describe the Evagrian order of eight passionate thoughts as largely *conventionnel*, it seems that in the description of these thoughts two orders may be found: empirical experience and spiritual growth. From the perspective of spiritual growth every next thought occurs when the former is overcome:

> The more the soul progresses, the greater are the antagonists that follow it in succession, for I am not convinced that it is always the same demons that persist against it. They know this best who perceive the temptations with greater precision and who see the impassibility refers to the relative strength of the demon still fighting against it (Sinkiewicz 2005, 153).

An anchorite thus begins to purify his soul struggling against passions of the concupiscible part of the soul: gluttony, impurity, and greed; then against

the thoughts of the irascible part: sadness and anger; then against acedia which attacks both parts of the soul: concupiscible and irascible; and finally, at the end, struggles with vanity and pride. So here we have an order that goes from bodily to spiritual thoughts. In fact, according to the empirical order of proceeding, a previous thought opens the way to the next. So Evagrius wrote that it is impossible to fall into the trap of the spirit of impurity if one had not fallen before, by the spirit of gluttony. Further, in the empirical order of proceedings, reversibility is still possible: a monk has been attacked by more spiritual thoughts but he can suddenly be in battle with bodily ones. And so for example the demon of vainglory often casts souls in the shackle of the demon of impurity or sadness (*Pr.* 13), while the demon of pride, the last one in the list, after which no other theoretically should appear, often stimulates demonic attacks of impurity, sadness and anger. However, there are no contradictions between these two orders. If a monk is on the path of purifying the passionate part of the soul, then winning the first six passionate thoughts one by one brings him to a state of *apatheia*. In such a state it is easy to seek human glory for the hard work of one's own asceticism, and if he succumbs to this temptation without receiving praise from the people, he falls into sadness or comforts himself with impurity. Likewise, one who yields to the demon of pride sooner or later discovers the truth that he himself is not the source of his success, and he may experience anger or sadness. It is not always the case that thoughts are attacked one after another from gluttony to pride, but often in practice a monk is tempted with three temptations at the same time as if from three different levels: gluttony in the concupiscible part of the soul, anger in the irascible and vanity in the rational.

Conclusion

In conclusion, I would like to emphasize that in earlier pagan, Judaic and Christian texts we find the Greek terms for six of the eight Evagrian passionate thoughts: γαστριμαργία, πορνεία, φιλαργυρία, λύπη, κενοδοξία, ὑπερηφανία, while in *Epistula ad Maecena*m appears the Latin term *iracundia* meaning "anger" and in Servian's *Commentary to Eneida* VI, 714 once again *iracundia* for "anger" and *torpor* which is very close to "acedia". Origen is the first Christian author in whose texts we find the same terms for all passionate thoughts as in Evagrius, so it seems probable that he is the principal source of the whole category; but in Origen we do not find any attempt to define the mutual relationship between the eight λογισμοί. The present state of research indicates that it was Evagrius himself who created the category of eight passionate thoughts, which later entered the Catholic Church under the name of the Seven Deadly Sins (Allen 1995, 15-21 and Allen 1997, 297-316). The proposition of Stelzenberger to identify the Evagrian list in one of the writings of Ephrem has beeen rejected since the text was written by John of Damascus in eighth VIII century (Stelzenberger 1993, 398), as well as the hypothesis of Vöglte

who just indicated in general Egyptian monastic centers without specifying the concrete texts (Vöglte 1941a, 217-237 and 1941b, kol. 74-79). The direct inspiration for Evagrius was the evangelical description of Jesus' temptation in the desert described in the Synoptic Gospels, whohere He was attacked by three passionate thoughts (demons): gluttony, avarice, and vainglory. The monk of Pontus then expanded the entire list to eight, based on the teaching of Jesus on the eight evil spirits returning after their expulsion from man, while their specific names were taken from earlier pagan, Judaic, and Christian tradition, especially from Origen since only in his texts do they all occur. The great Alexandrian in the context of all his theology has left his teaching in yet less precise form. Evagrius, on the basis of his own experience of combating passionate thoughts in the wilderness, limited their number to eight principal evil thoughts. The Guillaumonts are convinced that Evagrius took over the entire category from Origen and only the term λύπη from the Stoics, but I think that this postulate is not necessary. As we have seen, the same term in Greek and in Latin translations (*ira*) appears also in the writings of the famous Adamantius. Next, the Guillaumonts are simply wrong sustaining that Evagrius took over the whole category of eight passionate thoughts from Origen, because in his texts we do not find such a category but only the names of many evil spirits tormenting a man including the eight Evagrian ones.

In what sense then can Origen be seen as the source of the Evagrian teaching of the eight passionate thoughts? Origen is his source in the indirect sense, as the terminological inspiration of particular passionate thoughts. On the other hand, we do not see this inspiration in the assumption of the three so-called fundamental passionate thoughts and their number being limited to the eight principal ones (in Origen there are many more) which Evagrius has taken over from the New Testament. The description of cause-and-effect relationships between all eight passionate thoughts, both in the empirical order and in the spiritual struggle between the individual thoughts, is already a personal contribution of Evagrius based on his own experience and the spiritual direction of other monks. So the category of eight passionate thoughts is a personal creation of Evagrius and it is a good example of being inspired by Origen and the creative development of his thoughts without the servile repetition of his ideas.

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LITURGICAL MONODY AS A SUBJECT OF MUSICOLOGICAL RESEARCH – AN ATTEMPT AT A SYNTHESIS

Abstract

Until the Second Vatican Council, Gregorian chant was the only type of sacred song classified as the liturgical monody. Currently, the liturgical monody covers various genres of music, from Gregorian chants to contemporary compositions contained in manifold liturgical books. Preserved manuscripts provide a source of knowledge about the epoch, ways of worshipping God and the musical tradition prevailing at that time. A wide range of topics addressed by Polish musicologists include all genres and forms of the liturgical monody that constitute musical tradition of the Church. Studies of historical sources and analytical studies bear testimony to Poland's substantial contribution to the musical culture of Europe.

Keywords: liturgical monody, Gregorian chant, post-Gregorian chants

MONODIA LITURGICZNA JAKO PRZEDMIOT BADAŃ MUZYKOLOGICZNYCH – PRÓBA SYNTEZY

Abstrakt

Za monodię liturgiczną do Vaticanum II uważano wyłącznie chorał gregoriański. Obecnie obejmuje ona różne gatunków muzyki, od śpiewów gregoriańskich aż do współczesnych kompozycji zawartych w różnych księgach liturgicznych. Zachowane rękopisy są źródłem wiedzy na temat epoki, sposobu sprawowania kultu Bożego i obowiązującej wówczas tradycji muzycznej. Szeroki zakres zagadnień podejmowanych przez polskich muzykologów obejmuje wszystkie gatunki i formy monodii liturgicznej będące wytworem tradycji muzycznej Kościoła. Studia źródłoznawcze i analityczne dowodzą, iż wkład Polski w dorobek kultury muzycznej Europy jest znaczny.

Słowa kluczowe: monodia liturgiczna, chorał gregoriański, śpiewy postgregoriańskie

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Introduction

The Western musical art tradition gives evidence to the existence of a permanent link between liturgy and music. The Church's rulings contain unequivocal indications to treat the musical legacy of the Church as "a treasure of inestimable value, greater even than that of any other art (…) as sacred song united to the words, forms a necessary or integral part of the solemn liturgy" (Constitution on the Sacred Liturgy, No. 112). The question of music and its relationship with the liturgy evoked particularly lively interest after the Second Vatican Council (1962-1965). The research output of the Polish scientific community in this area is so considerable that its worth presenting its more important achievements and research directions.

1. The Meaning of the Term Liturgical Monody

The meaning of the term liturgical monody has evolved throughout the history of music. Among the manifold factors influencing that process, the principal one consisted in the emergence of successive forms and genres of songs. Therefore, it seems justified to explain both the past understanding of this term and its contemporary meaning in musicological literature.

1. 1. Historical Meaning

The term monody is derived from Greek words *monos* (one) and *ode* (song) and literally means a song intended for a single actor (Szlagowska 1998, 60). The concept of monody, however, is a complex one. In the first place, it refers to solo singing accompanied by one or more musical instruments. This type of music was already known in ancient cultures, and it became widely performed in the Middle Ages in the form of the Gaelic ballad, rondeau, virelai (*Encyklopedia Muzyki PWN* 2001[2], 75, 759, 927) as well as the madrigal and ballata (*Encyklopedia Muzyki PWN* 2001[2], 75, 513) on the territory of Italy. This form of music developed also in the Renaissance, mainly as a song with the accompaniment of the lute or as a madrigal accompanied by the clavichord. Such compositions paved the way for the so-called accompanying monody which emerged around 1600 (Szlagowska 1998, 61). It allowed to bring to the fore the text, which was blurred by the developing polyphony of late Renaissance, (Pawlak 2007, 353).

The term monody is also used with reference to single-voice solo and group songs performed without instrumental accompaniment. Essentially, it means a monophony, i.e. music deprived of a harmonic element, based solely on melody. Its examples include ancient music, Gregorian chant, Byzantine songs, songs of troubadours and trouvers, meistersingers and minnesingers, Iberian cantigas, 13th century laudes from Italy and the majority of folk songs (Pawlak 2007, 353).

1.2. Cotemporary Meaning

The term liturgical monody has been adopted in the contemporary literature. It includes Gregorian chants, along with post-Gregorian songs: selected hymns, tropes,

sequences, rhymed offices, liturgical dramas (Pikulik 1998, 17-24) and melodies to texts written in national languages: liturgical masses, psalms, songs (Pawlak 2000[1], 110). Prior to the Second Vatican Council, only Gregorian chant was classified as the liturgical monody. Other songs, especially those performed in national languages, came a long way before they were finally incorporated in liturgy (Feicht 1975a, 379, Korolko 1980). To a large extent, it was the text that decided upon the liturgical character of a given song. I. Pawlak, putting it in a nutshell, contends that a monody with a Latin text was considered a liturgical song, whereas one with a text in other language was classified as a non-liturgical song. After Vatican II, melodies with national texts were also included in liturgical singing (Pawlak 2000[1], 127).

The liturgical monody, therefore, comprises a number of different music genres created over the centuries for the needs of the Mass liturgy and the Breviary. Alongside Gregorian chant, it also includes post-Gregorian compositions, some church songs and contemporary one-voice liturgical songs in national languages.

2. SUBJECT OF STUDIES ON THE LITURGICAL MONODY

The subject of studies and musical analyzes of musical forms falling into the scope of monody include: Gregorian chants, post-Gregorian chants, church songs, Mass songs for texts in national languages and the Liturgy of the Hours songs. Scientists analyze their textual and melodic aspects as well as try to estimate their aesthetic value. Presentation of those issues allows to define the characteristic features of those songs and to point out their source patterns.

2.1. Gregorian Chant

The basic repertoire of Gregorian chant developed in the 8th century in result of a "clash" between the ancient Roman song and the Gallic liturgy (Bernagiewicz 2004, 19-24). Mixing those two varieties of songs resulted in the creation of aesthetic liturgical music, which was later adopted by religious and cathedral centers, giving it an individual character. It found expression in the emergence of manifold varieties of that chant (Benedictine, Dominican, Cistercian, diocesan and other chants). From 1278, when books with Gregorian chant were officially introduced to the papal court, this chant became an obligatory repertoire of Roman liturgy (Pawlak 2009, 331). Despite many vicissitudes, for example the deformation taking place in the 17th century (*Editio Medicaea* 1614/1615), it did not cease to remain the church's own singing (Bernat 1979, 222). It developed a number of musical forms (recitative, psalmodic, poetic and free), which to this day exert their influence on liturgical songs. Recitative forms include readings, prayers, passions, prefaces, the Lord's Prayer, the Easter proclamation, the Litany and *Te Deum*. They are often termed as cantillational forms because of their link with solo songs. The liturgy uses cantillation during the proclamation of the word of God, or when it brings prayers to God in the name of the faithful (Adamko 2005,

27-29, Morawski 1996, 21)[2]. Psalmodic forms include the office psalmody, introit and invitational psalmodies, short responsories, verses of office responsories, and verses of graduals. Poetic forms include hymns, tropes and sequences, which are the essential core of the Gregorian hymnody. On the other hand, studies on free forms comprise processional antiphons of the Mass, *Kyrie* and *Agnus Dei* songs, office antiphons and responsories, graduals and alleluiatic chants (Pawlak 2000[1], 131-138).

2.2. Post-Gregorian Chants

New forms of monody based on classical Gregorian structures began to emerge already in the ninth century. They gradually departed from Gregorian chant and began to evolve into: tropes, sequences, alleluiatic verses, *ordinarium missae* chants, rhymed offices, hymns, and liturgical dramas. The new forms were referred to as post-Gregorian in order to be distinguished from classical forms (Wiśniewski 2010, 16). D. Hiley, an English musicologist, defined the most characteristic features of the new style, such as the numerical order of antiphons and responsories according to subsequent modi, perfect fifth tonality, sub-tonality of cadence, greater range of ambitus, extensive melismas on the accented word syllable (Hiley 2003, 5). As regards Polish songs, these features were confirmed, among others, by B. Bodzioch (Bodzioch 2005) and P. Wiśniewski (Wiśniewski 2006). A documented Polish song is a rhymed office about St. Stanisław Wincenty from Kielcza, whose oldest records date back to the 14th century (Szymonik 1996).

2.3. Songs Included in Songbooks

When the Holy See gave a permission to replace processional antiphons with other songs (1967), the church song rose in significance (Pawlak 2006, 315). A significant role in including it in the liturgy was played by the *Musicam sacram* instruction (1967), which stated that "the custom legitimately in use in certain places and widely confirmed by indults, of substituting other songs for the songs given in the Gradual for the Entrance, Offertory and Communion, can be retained according to the judgment of the competent territorial authority" (No. 32). In Poland, as well as in other countries, chants were replaced by church songs which were commonly included in the liturgy. A thorough study, however, showed that many of them were for various reasons rendered unusable. Therefore, musicologists became interested in the analysis of texts and melodies of those songs (Garnczarski 2014) as well as their genetic connections, mutual borrowings, liturgical usefulness, etc.

2.4. Songs of the Liturgy of the Hours

The Liturgy of the Hours in the Polish language became an object of interest even before its official publication for dioceses in Poland (1982). Firstly, the ceremonies of

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[2]   As Ratislav Adamko notices, formerly, the term "liturgical recitative" was used. The concept of "cantillation" is used today primarily because the term "liturgical recitative" seems rather ambiguous and, according to some musicologists, even difficult to define; J. Morawski contends that the term "liturgical recitative" has not been defined precisely enough, which results in its ambiguous use.

the Paschal Triduum were elaborated. The first collection was issued in Kielce in 1973, followed by songbooks published in Lublin (1979, 1988, 1992), Warsaw (1979, 1991), Częstochowa (1984) and Kraków (1988). They contained both Gregorian melodies and songs created by composers (Bodzioch 2001, 84-85). Moreover, the post-conciliar songbooks were sifted with the aim of finding the songs of the Liturgy of the Hours. It appeared that Gregorian chants dedicated for the Liturgy of the Hours were scarce. Most often they represent individual pieces for specific hours, with the exception of the office for the deceased, which was included in its complete version (Lisman 2005, 166-167).

The Vespers, which in the post-Conciliar period were almost removed from pastoral practice, became the object of separate studies. According to I. Pawlak, this might have been the result of introducing afternoon Sunday masses. The singing patterns of the Vespers are provided in some editions of songbooks, e.g. those by W. Lewkowicz, or J. Siedlecki. There is also a separate edition of *Sunday Vespers* by Fr. I. Pawlak (Pawlak 2006, 318).

3. Research Methods for Monodical Songs

Research methods used in the study of Latin monody were developed in the nineteenth and twentieth centuries. Musicological medieval studies fall into the scope of historical disciplines, which means that the methodological procedures adopted by musicologists are analogous to that applied by historians (Pawlak 2007, 353-354). The main difficulty for musicologists are, however, melodies which reveal the most important constants related to the dating of sources. Therefore, the use of historical methods to musical analyzes does not always seem obvious. Historical methods comprise several stages: heuristics (the state of preservation, place of storage); source's criticism - external (recognizing the source's characteristics) and internal (examining the authenticity of the information and credibility of the author); determination of historical facts, synthesis. The above presented stages of the historical method can also be used in musicological research. On the basis of external and internal criticism, it is possible to identify the source, i.e. determine the authorship, affiliation of the source to a specific area, read the text and melody, and carry out research related to the musical analysis of a given work (Pikulik 1973, 31-32). The so-called indirect methods: philological (e.g. which can be used in the study of rubrics or marginalia), geographical (helps to define the features of the source characteristic of a given area), comparative (one of the most frequently applied in musicology, primarily, to compare the contents of different manuscripts containing the same chants), inference by analogy (it helps to establish new facts based on the current research findings), *ex-silentio* inference (based solely on assumptions), (Pawlak 2007, 355).

Genealogical method, first used by the Solesmes elaborating *Graduale Romanum*, is also important. A number of liturgical and musical manuscripts were examined and compared in order to track down the archetype of the Gregorian tradition. Those studies resulted in the systematics of liturgical and musical traditions. Books studied by the Benedictines of Solesmes include two groups: Western Romance (England,

Belgium, France, Spain, part of Italia) and Eastern Germanic (Austria, Germany, Switzerland, northern Italy). This method was also used by Polish musicologists, including K. Biegański and T. Maciejewski (Pawlak 2007, 356-358).

Another method is based on theoretical treatises *Musica enchiriadis* (9th century) and *Commemoratio brevis* (10th century), which are of fundamental historical significance. They allow the scientists to read choral melodies written in cheironomic notation. The method was popularized by a Lublin musicologist, J. Ścibor, who presented the results of his studies in a monograph on the modality of Gregorian chants (Ścibor 1999). This method focuses mainly on the modal aspect of Gregorian chant. Analyses of Gregorian melodies based on the above mentioned treatises allow to reconstruct modal structures of the Carolingian Renaissance. Another scientist dealing with that area of study is R. Bernagiewicz (Bernagiewicz 2011, 21-35).

However, as regards post-Gregorian songs, there is no one unambiguous method of study. The major characteristics of those songs, which have already been pointed out above, were defined by D. Hiley as regards Western scientists, while in Polang, they were confirmed by, among others, B. Bodzioch, K. Szymonik and P. Wiśniewski.

4. Research Conducted by Polish Musicologists

Preserved manuscripts constitute a valuable source of knowledge about the epoch, the worship of God and the musical tradition prevailing at that time. Analytical studies of Polish musicologists embraced all the emerging genres and forms of the liturgical monody. Many of the published results are, however, incomplete, among others due to improper protection and storage of sources or the plunder taking place during the Nazi occupation. Numerous valuable books were at that time deliberately destroyed or taken away from the country. Therefore, the research of the repertoire contained in Polish codices poses numerous difficulties. Nevertheless, the achievements of Polish medievalists in this field are quite noteworthy.

4.1. Gregorian Chant

Research on Gregorian chant in Poland was initiated by J. Surzyński, who among others translated foreign works into Polish (*Magister choralis*), published textbooks (*Directorium chori*, vol. 1, Poznań 1895, vol. 2, Poznań 1906), scientific and popular science articles and cantionals. Surzyński was criticized for using the Medici version of the chant in *Cantionale ecclesiasticum* (1892). In subsequent editions (1897; 1905) he used the so-called Piotrków chant[3] (Wiśniewski 2008, 8), but in the 1914 version of the cantional, he already used Roman books. Those

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[3] Although the Council of Trent did not carry out the liturgical reform, it set out its goal - the unification of liturgical rites. In Poland, the decisions of Trent were adopted at the synod in Piotrków (1577), and then accepted by the Episcopate. Those resolutions for many years provided the norm of the liturgical law of the Polish Church. Adoption of post-conciliar liturgical books required their adaptation to local customs and to filling the gaps in the old liturgical books. Publication of new books was commissioned to Andrzej Piotrkowczyk, who was acknowledged as the church publisher.

cantionals became very popular in Poland and were considered the best among the published ones (Wit 1980, 235-236). Surzyński's research was continued by W. Gieburowski, who focused on the repertoire of the Piotrków chant (Gieburowski 1922). Z. Jachimecki was another important researcher of the Latin monody, who focused on rhymed histories, hymns and sequences (Jachimecki 1930, 3-6).

H. Feicht, an author 185 manifold scientific positions, was an extremely deserving medievalist. His works included studies on Gregorian chant in Poland, musical manuscripts, hymns, influence of Gregorian chant on the emergence and development of the church song, etc. (Lissa 1975, 14-16). Feicht also conducted research on Piotrków antiphonaries, confirming, among others, the Roman origin of their melodies (Feicht 1975b, 248-249).

K. Biegański is another choralist worth mentioning here. He was the first to apply the method of melodic variants in research on Polish historical works, thus establishing the place of the Gniezno *Missale Plenarium* in the European tradition. This method was also partly applied by T. Maciejewski, who tried to define the provenance of the gradual from Chełmża. Maciejewski elaborated, among others, a catalog of mass chants in Poland up to the 17th century and conducted in-depth studies on liturgical codes (Maciejewski 1976). J. Morawski, an expert on the theory and history of medieval music (Morawski 1973, 1979b, 1996), is one more valued researcher. Source-based studies on music and liturgical manuscripts were also conducted on a wide scale by J. Pikulik. They included history of songs, their provenance and content analysis. Pikulik is the author of both monographic studies, concerning, for example, the index of Polish medieval graduals (Pikulik 2001), sequences (Pikulik 1974), alleluiatic songs (Pikulik 1995), songs about St. Wojciech (Pikulik 1996), as well as of numerous scientific articles on classical and post-classical forms of Gregorian chant (Pikulik 1969). His successor is Cz. Grajewski, whose research includes: Polish antiphonaries, canonical hours psalmody, European tonaries, and the Carthusian sources of the office psalmody. Grajewski is the author of three monographs (Grajewski 2002; 2004; 2013) and numerous articles in this field, published in recognized scientific periodicals. J. Ścibor, from the Lublin school, focused on the modal analysis of Gregorian chant (Ścibor 1999). The continuator of his research, R. Bernagiewicz, deals with issues related to semiology, modality, the history of Gregorian chant and the theory and aesthetics of medieval music (Bernagiewicz 1999a, 2004). The Gregorian repertoire is also studied by J. Kubieniec (Kubieniec 2006).

4.2. Post-Gregorian Chants

The so-called Post-Gregorian chants have become an important area of study, concentrating foremostly on all rhymed offices. This issue was undertaken by, for example, J. Morawski, who studied a rhymed story of St. Jadwiga and St. Wojciech

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Due to the fact that the most important books containing Gregorian chant, i.e. antiphonary, gradual and the ritual originated in this printing house, they were referred to as Piotrków positions, and the chant contained in them, as the Piotrków chant.

(Morawski 1977, 1979a); K. Szymonik, the author of a monograph about a rhymed office in honor of St. Stanisława (Szymonik 1996) and P. Wiśniewski, who elaborated the office about St. Zygmunt from a handwritten book collection in Płock (Wiśniewski 2006). In addition to the above mentioned monographs, one should also mention a number of contributive works by, for example, B. Gładysz, J. Kubieniec, B. Bodzioch, Z. Kołodziejczak and others, published in a number of various scientific journals.

Sequences constitute another area of interest as regards works from the Post-Gregorian repertoire. There appeared many catalogs of those works, especially that of B. Gładysz (Gładysz 1934; 1937), H. Feicht (Feicht 1958), J. Woronczak (Woronczak 1952) and J. Pikulik (Pikulik 1974), which significantly contributed to the enhancement of Polish compositions, and thus complemented the largest collection of medieval Latin poetry: *Analecta Hymnica Medii Aevii* treating Polish monuments rather marginally. Among the latest studies the monograph of M. Nowak is worth highlighting. Nowak analyzed the Mass sequences in the post-conciliar liturgy, outlined the history of this genre, gave Polish translations of texts and conducted their musical analysis (Nowak 2008). Another interesting position is a study by M. Strawa-Iracka regarding the sequential repertoire in the Piotrków gradual (Strawa-Iracka 2011, 101-142).

4.3. *Ordinarium missae* Chants

Ordinarium missae chants constitute one more point of interest for musicologists. New post-Gregorian songs appeared also in Polish sondbooks. The fact that they were still performed after the Council of Trent is evidenced by their inclusion in the Piotrków gradual (several *Kyrie* and *Agnus Dei*, and one *Sanctus*). *Credo* songs were also composed, but they were usually unrelated to Gregorian chant. This issue was researched by, among others T. Miazga and I. Pawlak (Miazga 1976; Pawlak 1988) and the conducted studies greatly contributed to highlighting the abundance of the Polish creative output. Among others, scientists pointed to several *Kyrie* melodies which did not appear among the 226 of western compositions. It was demonstrated that the melody of Polish works is richer thanks to the use of transition and auxiliary notes, that it has a larger ambitus and is characterized by the use of various dialects (Hinz 1987; Melnicki 1955).

4.4. Chant in Poland after the Council of Trent

Studies of the Piotrków chant were initiated at the end of the 1980s by I. Pawlak, who published the findings of his detailed liturgical, historical, source-based and musicological research in a monograph (Pawlak 1988). Pawlak concentrated, among others, on the repertoire of the Passion and Easter songs contained in the Piotrków gradual and their link with *Editio Medicaea*; Polish liturgical customs preserved in Piotrków prints (Pawlak 1987); the repertoire of Latin songs in Polish liturgical rites contained in those books (Pawlak 1998). I. Pawlak's initiative spurred further research, which resulted in numerous scientific dissertations concerning, inter alia, songs of the Easter procession, the sequential repertoire, *mandatum* songs, Polish

liturgical and musical traditions on the example of rhymed rites or procession songs. In his opinion, the fact of publishing the official liturgical and music books for the whole Gniezno province in print was a sensation. Before that, songbooks had been printed only within dioceses or monasteries. It means that Poland became a pioneer in the edition of liturgical singing in the 17th and 18th centuries (Pawlak 2009).

4.5. Paleographic and Semiological Issues

Studies on the Latin repertoire also include issues from the field of paleography and semiology. As regards Poland, publications on notation and interpretation of Gregorian melodies by R. Bernagiewicz (Bernagiewicz 2005), H. I. Siekierka (Siekierka 2005, 2011) and M. Białkowski (Białkowski 2009) come to the fore. Bernagiewicz defined the most important neumatic traditions and constructed a synthetic classification based on the principal neumatic classifications. The scientist contended that the genetic and graphic criterion in Cardin's approach is insufficient to define the character of liquescence of simple neumes and demonstrated new ways of interpreting this liquescence based on conducted analyses. Bernagiewicz elaborated on that issue in his work on the notation of the Wiślica gradual (Bernagiewicz 1999a, 292-293).

CONCLUSION

The present study, according to the assumptions carried out in a brief and cursory manner, pointed out significant research areas undertaken by Polish musicologists specializing in medieval studies. It revealed, at least partly, a broad spectrum of issues covering all genres and forms of the liturgical monody that are the output of the centuries-old musical tradition of the Church. The findings of source-based research published so far in the form of monographs and numerous scientific articles not only give an idea about Polish liturgical and musical tradition, but it also provides evidence of Poland's substantial contribution to the musical culture of Europe, a contribution which deserves due recognition.

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