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**The**  
**Person**  
**and**  
**the**  
**Challenges**

**The Journal of Theology,  
Education, Canon Law  
and Social Studies  
Inspired by Pope John Paul II**



**The Pontifical University  
of John Paul II  
in Krakow**



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## **Purgatory and Hell in Medieval Female Mystics' Visions**

### **Abstract**

Death and the afterlife have always evoked both fear and hope among people. Consequently, they have endeavoured to gain a deeper understanding of what lies beyond life's earthly realm. Christian teachings and the official doctrine of the Church offer a broad overview of this reality, leaving room for an expectation of a more detailed explanation of the fate that awaits individuals after death. Female mystics, particularly those who lived during the late Middle Ages, played significant roles in elucidating these destinies. Their visions and subsequent writings contain a wealth of details concerning the nature of eternal life, providing meticulous descriptions of the places and events that unfold after death. This article delves into their visions of purgatory and hell, examining their relationship with the official Catholic doctrine.

### **Keywords**

purgatory, hell, Mystics, Middle Ages, eschatology

## 1. Introduction

The concept of life after death has been a perennial mystery, one that has intrigued people from various epochs. However, during the Middle Ages, a particularly eschatological period, Christianity held a dominant sway over people's beliefs. Additionally, the people of that era lived in constant fear of death, largely due to diseases, plagues, and wars that surrounded them. This heightened awareness of mortality naturally led to questions and anxieties regarding the fate of human souls after death. Christianity provided answers to these profound inquiries. Yet, these answers did not solely emanate from the Bible and the official teachings of the Church. They also found expression in the writings of mystics who, based upon their extraordinary visions, meticulously described the realms that awaited the departed.

A distinctive group of mystics during the Middle Ages were women whose visionary experiences gained widespread popularity. These mystics often influenced preaching and visual art, thereby significantly shaping the collective consciousness of the masses. Late medieval female mystics played a particularly exceptional role in moulding eschatological beliefs. Within the realm of women's mysticism, a rich tapestry of eminent personalities emerges, spanning across the vast landscape of medieval Europe. These luminaries, each with their distinct hues, cast a mosaic of diversity upon the canvas of history.<sup>1</sup> Among them, jewels of particular fascination emerge – Hildegard of Bingen (1098–1179), Mechthild of Magdeburg (1207–1282), Gertrude the Great (1256–1302), Angela of Foligno (1248–1309), Birgitta of Sweden (1303–1373), Catherine of Siena (1347–1380), Julian of Norwich (1342–1416), Frances of Rome (1384–1440), and Catherine of Genoa (1447–1510).

In their visionary experiences, they dedicated a significant portion to depicting the encounter between the saved individuals and Christ, often referred to as the Bridegroom.<sup>2</sup> For this reason, the mystical descriptions of death resemble hymns and antiphons, particularly those designed for the Feast of the Assumption of the Blessed Virgin Mary, which state that the Queen has been taken into the wedding chamber, where the Heavenly King sits upon his throne. For many

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<sup>1</sup> E. R. Obbard, *Medieval Women Mystics: Gertrude the Great, Angela of Foligno, Birgitta of Sweden, Julian of Norwich: Selected Spiritual Writings*, New York 2002, New City Press.

<sup>2</sup> Cf. Gertrude D'Helfta, *Œuvres Spirituelles*, III, *L'Héraut*, Livre III, Paris 1968, Les Éditions du Cerf, p. 104; Gertruda z Helfty, *Ćwiczenia*, Tyniec 1999, Wydawnictwo Benedyktynów.



mystics, death was an event akin to the Assumption of Mary.<sup>3</sup> In one vision, for example, Gertrude witnessed the death of a nun whose soul was carried to heaven by angels. There, she received a crown from the hands of Christ the Bridegroom and then sat with Him on the throne. In another vision, Christ explained to Gertrude that after her death, she would be taken to the royal palace, where she would await her wedding day in great glory. In medieval mysticism, death thus ceased to be frightening, while the event of judgment was given a new context of meaning, namely wedding symbolism. The mystics perceived Christ more as the bridegroom than the judge, while the Judgement Day was regarded rather as the return of the bridegroom – an eternal reward for the virgins – than a terrible day of wrath and punishment. Julian of Norwich even argued that God is not only a father, but also a mother, who is full of love, compassion, and forgiveness.<sup>4</sup>

In their visionary experiences, medieval female mystics did not exclusively focus upon those who had already attained salvation. They also devoted significant attention to individuals whose fate, following the particular judgment, led them either to purgatory or hell. This primarily served a pedagogical purpose, acting as a deterrent against sin and promoting a life of faith. The visions of these mystic women are valuable due to their uniqueness, vivid descriptions, and the profound emphasis on emotions. This helps us better understand the phenomenon of their popularity. Therefore, by examining the writings of these medieval female mystics, we aim to clarify the portrayal of purgatory and hell as revealed through their visions and explore how these mystics engaged with Catholic doctrine on this subject.<sup>5</sup>

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<sup>3</sup> C. McDannell, B. Lang, *Heaven. A History*, New Haven 2001, Yale University Press, p. 103.

<sup>4</sup> M. D. Burkholder, *God our Suffering Mother? Kenotic Antonement in Julian of Norwich's Revelations of Divine Love*, "Journal of Theology and Ministry" 21 (2019–2020), pp. 27–51.

<sup>5</sup> A monumental three-volume work on mysticism was written by Charles-André Bernard: *Il Dio dei mistici*, vol. 1, *Le vie dell'Interiorità*, Cinisello Balsamo 1996, San Paolo Edizioni; *Il Dio dei mistici*, vol. 2, *La conformazione a Cristo*, Cinisello Balsamo 2000, San Paolo Edizioni; *Il Dio dei mistici*, vol. 3, *Mistica e azione*, Cinisello Balsamo 2004, San Paolo Edizioni. The author describes, among others, some experiences of mystic women such as Angela da Foligno and Hildegard of Bingen; however, his primary focus is on their spirituality, not eschatology.

## 2. Purgatory: between pain and hope

Purgatory was of particular interest for mystical literature, as it is located at the crossroads of time and eternity and, through the idea of intercession, demonstrates the connection of temporality and the afterlife<sup>6</sup>. In the works of the mystics, two main strands of the doctrine of purgatory can be distinguished. The first one describes purgatory as a temporary hell, while the second presents it as an independent realm separate from hell that is the result of God's love and mercy. The first strand is well-represented by female mystics, such as Catherine of Siena,<sup>7</sup> Birgitta of Sweden,<sup>8</sup> Mechthild of Magdeburg, and Hildegard of Bingen. In her work *Liber vitae meritorum*,<sup>9</sup> Hildegard describes the purgatorial punishments, drawing from accounts of infernal torments found in visionary literature such as Drythlem's vision recorded by Bede the Venerable. The very location of purgatory was also sometimes associated with *infernum*. According to Hildegard, it is in the upper levels of hell. In her vision, the souls are subjected there to the suffering caused by fire. These torments occur in a variety of places that form the purgatorial landscape: pits, lakes, or caves. Fire is sometimes replaced by a reeking swamp cleansing sins of recklessness, pride, and inconstancy. Furthermore, purgatory is full of all kinds of vermin, snakes, and scorpions.<sup>10</sup> Purgatory is thus varied in terms of both environment and types of purifying punishments inflicted there. For instance, the unjust suffer in a place full of vermin and blazing thorns, where demons strike them with fiery whips.<sup>11</sup> All of this is reminiscent of the categorisation inherent in hell. According to Hildegard, naturalistic fire (linked by her with volcanic activity) is the

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<sup>6</sup> Cf. S. Jaśkiewicz, *L'aspetto ecclesiale dell'esistenza cristiana nella morte*, "The Person and the Challenges" 5 (2015), 1, pp. 129–132.

<sup>7</sup> Catharina Senensis, *Il dialogo della divina provvidenza ovvero libro della divina dottrina*, Roma 1968, Edizioni cateriniane, p. 81.

<sup>8</sup> Descriptions of Purgatory are included in her visions from 1346 and 1373. They were published by Alphonse of Pecha between 1329 and 1389. See. E. Colledge, *Epistola solitarii ad reges: Alphonse of Pecha as Organizer of Birgittine and Urbanist Propaganda*, "Medieval Studies" 18 (1956), pp. 19–49.

<sup>9</sup> Hildegard of Bingen, *Liber vitae meritorum*, in: L. van Acker (ed.), *Corpus Christianorum Continuatio Mediaevalis*, vol. 90, Turnhout 1995, Brepols, I, p. 77.

<sup>10</sup> S. Flanagan, *Hildegard of Bingen: a visionary life*, London, New York 1989, Routledge, p. 92.

<sup>11</sup> Hildegard of Bingen, *Liber vitae meritorum*, IV, p. 43.

most prominent of all punishments. She displays purgatorial flames as especially effective. Contrary to prevailing views of the time, she believes that they purify sinners who have committed mortal sins, if they demonstrate repentance. It thus greatly expands the group of purgatory's residents, excluding only suicides.<sup>12</sup> In Hildegard's view, the suffering of the soul in purgatory is very tangible as it has a physical dimension.

Mechthild's Purgatory also exhibits infernal qualities. In her visions, she saw that the abyss which used to contain the Old Testament figures, currently serves as purgatory. The region inhabited by the greatest sinners is virtually the vestibule of hell. Its residents include representatives of various social groups, such as bishops and lords. This part of purgatory is directly connected to hell through the mouth of hell.<sup>13</sup>

Similarly, in the visions of Birgitta of Sweden, purgatory exhibits infernal features as well. This applies especially to its lower section, which is completely dark, cold, and where souls experience various mental and physical torments affecting a variety of senses (hearing, sight, and touch). Fire is the source of the most painful physical suffering.<sup>14</sup> The souls residing there remain unsure of their salvation, which causes additional anguish. Birgitta's Purgatory consists of several regions situated one above the other, thus enabling souls to move upwards. This vertical structure and the associated ascending movement bear symbolic significance illustrating the process of the soul's posthumous refinement through suffering. Hell is located on its lowest level: it is depicted as a massive furnace. It is surrounded by an inescapable dark abyss (*limbus*). It is therefore an enclosed area excluded from the ascending movement of the afterlife. The three levels of purgatory are located above hell. Its two upper sections are the place where a soul awaits salvation, while actual purgatorial punishment takes place in the lowest one. It resembles the torments of hell, except that it does not last forever. In the uppermost region of purgatory, the only punishment is the inability to see God while longing for him. In the central region, souls suffer from spiritual weakness and deprivation of beauty. Their suffering may be shortened by the intercession of the living. Birgitta's visions provide details of specific dead people

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<sup>12</sup> S. Flanagan, *Hildegard of Bingen: a visionary life*, p. 91.

<sup>13</sup> Mechthild of Magdeburg, *Flowing light of the Godhead*, New York 1998, Paulist Press, 3.21.

<sup>14</sup> T. Matsuda, *Death and Purgatory in Middle English Didactic Poetry*, Cambridge 1997, Boydell and Brewer, p. 71.

residing in purgatory and the prayers that might help them.<sup>15</sup> According to her revelations, purgatory is also accessible for those who made a deathbed conversion. They end up in the lowest part of purgatory and experience torments akin to that of hell. Birgitta also mentions Mary's special role as protector of the souls in purgatory. In one of the visions, Mary even refers to herself as their mother.<sup>16</sup>

An example of the second strand in understanding the doctrine of purgatory is represented by Catherine of Genoa. Her *Trattato del purgatorio*<sup>17</sup> is significant for the development of this concept. It describes a dualistic aspect of purgatory as a place where souls experience both suffering and joy. Such an approach considerably distances purgatory from hell. It is no longer a temporary hell, full of terrible tortures, but a preparation for a reunion with God, where purifying suffering is accompanied by joy and hope. Catherine even claims that this joy is second only to the happiness of the saved in heaven and steadily increases as the purification progresses.<sup>18</sup> She understands purgatory as an advancing process in which souls become increasingly pure and God-like, thereby intensifying their joy. There are various reasons for experiencing happiness in purgatory, such as the certainty of salvation, awareness of one's inability to sin,<sup>19</sup> a conviction of the justice and mercy of God's judgments,<sup>20</sup> joyful submission to God's will,<sup>21</sup> and a deepening knowledge of God during their penance.<sup>22</sup> The joy felt in purgatory is not the only feature that distinguishes it from hell. Catherine emphasises the fact that the souls in purgatory are not malevolent and their guilt has been forgiven due to repentance. Moreover, the mystic indicates that in purgatory, despair and fear are replaced by hope. Although Catherine also speaks explicitly of suffering the separation from God, inability to see him, and awareness of a wilful transgression, all these torments are of a spiritual nature.

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<sup>15</sup> *The Revelations of Saint Birgitta*, Oxford 1929, Oxford University Press, p. 128.

<sup>16</sup> *The Revelations of Saint Birgitta*, Oxford 1929, pp. 50–51.

<sup>17</sup> Caterina da Genova, *Trattato del purgatorio e altri scritti*, T. Giuggia (ed), Milan 1996, Gribaudi.

<sup>18</sup> Katarzyna z Genui, *Traktat o czyściu*, Sandomierz 2013, Armoryka, 2.1; Cf. A. Zwoliński, *The Christian Understanding of Happiness*, "The Person and the Challenges" 6 (2006), 1, pp. 81–103.

<sup>19</sup> Katarzyna z Genui, *Traktat o czyściu*, 1.4.

<sup>20</sup> Katarzyna z Genui, *Traktat o czyściu*, 18, 3–4.

<sup>21</sup> Katarzyna z Genui, *Traktat o czyściu*, 1.2; 6.1.

<sup>22</sup> Katarzyna z Genui, *Traktat o czyściu*, 6.3.

The only physical aspect of purgatorial suffering is the fire which is an instrument of soul purification.<sup>23</sup> Her description lacks the elaborate punishments and tortures inflicted by demons. This image of purgatory is more optimistic, thus being a major step in doctrinal development. It was later developed by theologians, including Saint Cajetan, Johann Eck, and Francis de Sales.<sup>24</sup>

### 3. Hell: terrifying hierarchy

Hell was also the object of women's eschatological visions. It was usually depicted traditionally, paying great attention to detail. However, a certain novelty was its juxtaposition with the hierarchical structure of heaven. For the mystics, hell is the exact opposite of heaven. Like the celestial hierarchy, there is its infernal counterpart which imitates the angelic choirs. Creating such a 'copy' does not result from a lack of conception, but is theologically justified. Frances of Rome<sup>25</sup> explains this in *Tractatus de inferno*,<sup>26</sup> referring to the fall of Lucifer. During his revolt, one third of each choir rebelled. Those fallen angels form the infernal hierarchy. Most of them never leave hell, some float in the air (suspended between heaven and earth), and others remain among humans to tempt them and then lead them to hell.<sup>27</sup>

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<sup>23</sup> Katarzyna z Genui, *Traktat o czyściści*, 10.2.

<sup>24</sup> Cf. J. Delumeau, *Grzech i strach*, Warszawa 1994, Instytut Wydawniczy PAX, p. 551.

<sup>25</sup> The visions of Francesca of Rome were recorded in Latin by her confessor. A critical study of them has been published e.g. in the following item: B. Romagnoli, *Santa Francesca Romana. Edizione critica dei trattati latini di Giovanni Mattiotti*, Città del Vaticano 1994, Libreria Editrice Vaticana.

<sup>26</sup> This treatise consists of three parts. The first describes the structure of the kingdom of darkness as well as the figure of Lucifer being its prince. The second is a detailed description of the 36 places in Hell corresponding to the categories of sinners residing there. The third is an abridged treatise on demonology and features a description of the strategy of the infernal hierarchy. Only the first and third parts have survived to date. Sainte François Romaine, *Traite de l'enfer. L'enfer existe. Texte imprimé visions de sainte Françoise Romaine, XVe siècle, sainte Thérèse d'Avila, XVIe siècle, Anne-Catherine Emmerich, XIXe siècle, enfants de Fatima, XXe siècle*, M. I. Alvira, P. de Laubier (eds), Paris 1996, P. Téqui, pp. 19–43; Cf. O. Moroni, *Le visioni di S. Francesca Romana tra medioevo e umanesimo*, "Studi Romani" 21 (1973), pp. 160–178.

<sup>27</sup> Sainte François Romaine, *Traite de l'enfer. L'enfer existe. Texte imprimé visions de sainte Françoise Romaine, XVe siècle, sainte Thérèse d'Avila, XVIe siècle, Anne-Catherine Emmerich, XIXe siècle, enfants de Fatima, XXe siècle*, p. 24.

The infernal hierarchy thus consists of nine orders, divided into three hierarchies of three orders each. Furthermore, each of them consists of nine ranks. Lucifer occupies the very top of the hierarchy. Below him are the princes – three demons, each of whom once belonged to a different of the highest order: Asmodeus once belonged to Cherubim, Mammon to Thrones, and Beelzebub to Dominions. Each reign over a different kind of sin: Asmodeus rules bodily temptations, Mammon governs avarice, and Beelzebub is the prince of idolatry (including sorcery and divination). The princes reside at the bottom of hell and never leave it, but send other demons to tempt mankind. Demons originating from the three highest orders are tasked with torturing the worst sinners.<sup>28</sup> Demons from lower orders are found in the middle (demons from the choirs of Dominions, Virtues, and Powers) and upper hell (Archangels and Angels).<sup>29</sup>

The infernal hierarchy has an organised structure; its lower ranks are subject to the higher ones, whilst all of them obey Lucifer's will. Therefore, hierarchy is an ontological principle. Frances of Rome thus emphasises that both celestial and infernal hierarchies are subject to God's will. Even the very existence of hell is an expression of divine justice.<sup>30</sup> Therefore, the mystics perceived hell not as shapeless chaos, but as a place with a well-organised central structure. The individual demons are assigned specific tasks. Each is responsible for a different kind of sin and an assigned sinner whom he oversees and torments. In this division, demonic tempters make up a special category. They leave hell with the aim of tempting humans and then taking their souls after death. The mystic provides some interesting details about their activity. Immediately after death, any soul that succumbed to demons' wiles is shackled and cast into hell. Its guardian angel accompanies it to the threshold of hell and then returns to heaven. In the case where a soul is sent to purgatory, it is the demon who escorts it away; but he stops at its gateway, for he cannot enter there. However, there is a special case when a soul has barely escaped hell and ends up at the bottom level of purgatory. There, it beholds their tempter being tortured for failing his task and hears insults thrown by him. It causes additional suffering for the soul, as seeing a demon is always a torment.<sup>31</sup>

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<sup>28</sup> Sainte François Romaine, *Traite de lenfer. Lenfer existe*, pp. 24–25.

<sup>29</sup> Sainte François Romaine, *Traite de lenfer. Lenfer existe*, pp. 26–27.

<sup>30</sup> Sainte François Romaine, *Traite de lenfer. Lenfer existe*, p. 31.

<sup>31</sup> Sainte François Romaine, *Traite de lenfer. Lenfer existe*, pp. 37–38.

Frances' visions also contain detailed accounts of the fate of the damned. They are described step by step, beginning with the moment of temptation and ending with an assignment to a proper place in hell. In one vision, Frances saw the demon-tempter standing on the left side of the sinner – as opposed to the right, the left side is reserved for hell. After capturing a soul, he drags it like a slave to the infernal gates and then throws it into the open mouth of hell. Once the sinner gets inside, he is unable to escape. Then, specially appointed demons lead him before fire-breathing Lucifer. The flames immediately engulf his entire body and the wicked, who is then judged by Lucifer and assigned the appropriate spot in hell, according to the sins committed. A shackled soul cannot move on its own, so it is dragged there by specially appointed demons.<sup>32</sup>

The women mystics perceive hell through the prism of the spiritual entities that inhabit it. They are hierarchically organised and operate according to a strict strategy. Their definition of hell is ontological rather than spatial. According to Hildegard, demons, being ontologically dark as they lost an ability to reflect the divine light, constitute the essence of hell more than physical darkness and torture.<sup>33</sup> Yet, as its spatial characteristics are featured in mystical literature, hell may be considered a place too. According to Frances of Rome, it is composed of three parts: upper, middle, and lower. Sinners are placed there according to the gravity of their guilt and the corresponding punishment; the lower they are, the darker it gets, and their torment is greater. The individual sections of hell are not clearly separated from each other, so their boundaries remain rather fluid. The ternary division of *infernum*, with cruelty and severity of punishments increasing with moving downwards, can be also found in the works of other mystics, such as Mechthild. The differences mainly depend upon the criterion used to allocate sinners. For Mechthild, this criterion is confessional. In the lower hell reside Christians, Jews in the middle, and pagans in the upper one. The sinners are arranged according to the category of their sins, which was a revolutionary idea at the time. It is an expression of the principle of retribution depending on the value of the received gift.

This is confirmed by the lament of the damned heard by the mystic. Pagans complain that if they had kept the Law, they would not suffer forever; Jews lament that if they had followed the Law of Moses, they would not be condemned; finally,

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<sup>32</sup> Sainte François Romaine, *Traite de l'enfer. L'enfer existe*, p. 23.

<sup>33</sup> F. Beer, *Women an mystical experience in the Middle Age*, Woodbridge 1992, Boydell Press, pp. 46–55.

Christians weep, as they have received the supreme honour of being the children of God, but rejected it and chose Lucifer, hence they must stand naked before him while he mocks them and laughs at their foolishness. Infernal punishments are assigned to categories of sins and represent them symbolically. Mechthild provides whole catalogue of tortures describing the torments of the damned with meticulous detail. Most punishments are inflicted directly by Lucifer, or somehow related to him. Thus, the mystic mentions the sodomites who are kept in the bowels of the beast (the personification of Lucifer) – it consumes them, then regurgitates, and swallows again. The hypocrites are tormented by being in Lucifer's proximity, as they are placed on the lap of the beast. The unbelieving teachers of the faith are forced to stay at Lucifer's feet and look him in his face, the avaricious are being devoured and excreted by Lucifer, murderers are torn to pieces with Lucifer's fiery sword, and finally, the gluttons and drunkards are fed by Lucifer with stones, fire, and brimstone.<sup>34</sup> The list of elaborate punishments is lengthy; all of them reflect the type of sins committed. Mechthild also evokes the image of an 'infernal kitchen' where demons prepare a huge stew using sinners as ingredients. In her vision, hell is a realm of madness, insanity, and all kinds of vermin, where demons eternally struggle with the damned and each other.

The hell of the mystics is filled with terrifying zoomorphic beasts and all sorts of horrible monstrosities that have no counterparts on earth. In Frances' vision, hell has the form of a great dragon with its head located in the upper level, its body in the middle one, and its tail in the lower part.<sup>35</sup> It has an open maw breathing fierce flames, emits a terrible reek, and a foul smell of burning comes from its ears and nostrils.<sup>36</sup> The gates of hell are situated in the dragon's maw; the sinners who walk inside can move only in one direction, towards the inside. An inscription on the threshold reads: "This is Hell, without hope or respite, where no one shall find peace."

The motif of the beast and the maw of hell also appears in Mechthild's works. She sees it constantly open and ready to swallow up sinners.<sup>37</sup> Lucifer, the Prince of Darkness, has his throne in the very centre of hell. In her treatise on the subject, Frances provides a frightening description of the infernal ruler. He sits

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<sup>34</sup> Mechthild of Magdeburg, *Flowing light*, 3.15.

<sup>35</sup> Sainte François Romaine, *Traite de l'enfer*, 20.

<sup>36</sup> Sainte François Romaine, *Traite de l'enfer*, 21.

<sup>37</sup> Mechthild of Magdeburg, *Flowing light*, 3.21.



in the middle of hell, engulfed by a monstrous whirlwind, at the same time being present in every corner of the infernal realm. He has a crown of antlers, flames erupt from his horrific countenance, and his body is entwined with burning chains that reach into all regions of hell forming a spider web that prevents the damned from escaping or moving freely.<sup>38</sup> Mechthild described Lucifer as a beast with numerous fiery eyes and a large open maw that swallows the damned. According to this mystic, after the Final Judgement, Lucifer will cover himself with a cloak made of mud from the sins of the whole world which will intensify his rage and cruelty.<sup>39</sup> Mechthild expands the idea that is present in medieval theology. It says that the suffering inflicted by Lucifer on sinners will intensify after the Final Judgement. The image of Lucifer as the beast who dominates hell with his power and size, and who devours and excretes sinners, has become a permanent feature of mystical visions of hell.

Summarising the mystics' view on hell, following Georges Minos, it may be concluded that hell is full of dread stemming from ontology (the infernal hierarchy), rather than being a place of punishment.<sup>40</sup> Therefore, hell is terrifying as a sphere where personal evil and spiritual entities of angelic origin reign. Simultaneously, mysticism provides vivid images which symbolise elusive spiritual reality. In this case, images seem to be more useful than abstract concepts, hence the mystics' hell is full of fantastical monsters and beasts. Despite grotesque descriptions, these monstrosities do not trivialize hell as they visualize the spiritual powers that reside there. Infernal punishments are presented symbolically as well. Lucifer's tortures draw from various fields (gastronomy, medicine, criminology) and constitute a genuine treasury of visual motifs, with the infernal kitchen being one of the most noteworthy.

#### 4. Conclusions

The visions described by medieval female mystics largely align with the official teachings of the Church, although they often provide additional details not found in official doctrine. It is important to note that the Church typically proclaims only what originates from the Bible and Tradition, understood as the living

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<sup>38</sup> Sainte François Romaine, *Traite de l'enfer*, 22.

<sup>39</sup> Mechthild of Magdeburg, *Flowing light*, 3.21.

<sup>40</sup> G. Minos, *Historia piekła*, Warszawa 1998, Państwowy Instytut Wydawniczy, pp. 222–224.

transmission of faith. However, mystics, unbound by such limitations, were able to convey their subjective experiences.

One of the most intriguing aspects addressed in these visions is the concept of purgatory. It is worth noting that the doctrine of purgatory was a relatively new concept at the time, emerging during the Second Council of Lyon in the year 1274. One of the key figures behind the convening of this Council was Emperor Michael VIII Palaiologos of Constantinople. The Creed of Faith he prepared was officially incorporated into the Council's proceedings and became the authoritative document for the Latin Church.<sup>41</sup> This marked the first official pronouncement by the Church on the subject of purgatory. The formal declaration of the teaching on purgatory as a dogma occurred later, specifically during the Council of Florence in 1439<sup>42</sup>, where the essential points raised by Michael VIII Palaiologos were reaffirmed.

Purgatory was believed to be the destination for individuals who had passed away in a state of God's grace, but had not yet fully atoned for their sins and made amends. Therefore, purgatory was seen as a process of purification (derived from the Latin word "purgari"), during which souls undergo purifying punishments referred to as 'poenae purgatoriae'.<sup>43</sup> The Council clarified that purgatory is not so much a physical place as it is a spiritual process.

Additionally, the Council asserted the necessity of intercession for the souls in purgatory through Mass, prayer, and almsgiving.<sup>44</sup> Notably, the Council did not explicitly mention the concept of purgatorial fire, as this idea faced opposition from the Eastern Orthodox Church.<sup>45</sup> Due to this disagreement, indulgences were also not included as a means of assistance for the souls in purgatory.<sup>46</sup>

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<sup>41</sup> H. Denzinger, A. Schönmetzer, *Enchiridion Symbolorum*, Freiburg 1965, Herder, no. 851–861; Cf. *Breviarium fidei. Wybór doktrynalnych wypowiedzi Kościoła*, I. Bokwa (ed.), Poznań 2007, Wydawnictwo św. Wojciecha, VII, p. 106.

<sup>42</sup> The content of the Council of Florence's teaching on Purgatory we can find in: *Enchiridion Symbolorum*, no. 1304; Cf. B. Hamilton, *Religion in the Medieval West*, London 1986, Cambridge University Press, pp. 46–47.

<sup>43</sup> P. Mąkosa, *The Roman Catholic Church's Late Medieval Teaching on Eschatology as the Basis for Visual Catechesis*, "Rocznik Teologii Katolickiej" 18 (2019), p. 148.

<sup>44</sup> L.F. Ladaria, *Kres człowieka i kres czasów*, in: B. Susboüé (ed.), *Człowiek i jego zbawienie. Historia dogmatów*, Kraków 2001, Wydawnictwo M, p. 401.

<sup>45</sup> Cf. A. Nichols, *Rome and the Eastern Churches. A Study in Schism*, San Francisco 2010, Ignatius Press, p. 293; J. Le Goff, *Narodziny czyszcza*, Warszawa 1997, Państwowy Instytut Wydawniczy, p. 288.

<sup>46</sup> Cf. J. Finkenzeller, *Eschatologia*, Kraków 2000, Wydawnictwo M, p. 133.

It can be observed, therefore, that the visions of female mystics occurred during the development of the doctrine of purgatory. It could be argued that, on one hand, they were influenced by the evolving teachings of the Church, and on the other hand, they played a role in disseminating the concept of purgatory among the faithful. They did so not only through their writings, but also indirectly through preaching and sacred art, such as depictions of the Last Judgment. For these reasons, a more in-depth study of their contributions is warranted.

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## For a *Via Pulchritudinis Musicalis*. Some Notes for a Musical Spirituality

### Abstract

To aim for the unspeakable divine, nothing beats the *via pulchritudinis musicalis*, the path of beauty advocated by Christian tradition, from Augustine to Luther and the recent popes, which contains parables to make the “unheard of” of the Spirit heard and to reconcile the disagreements between humans. The article deploys twelve metaphors of musical spirituality, as so many different sounds available to seekers of meaning, singers and musicians of the infinite, playing on the numbers: the sound of silence; the three-tone Trinitarian chord; the seven notes of the divine scale; humanity and the believing community as a four-part choir; the five lines of the staff of existence; the righteousness (justice) of the six strings of the guitar; the transcendence of the Christ melody; the stereophony between heaven and earth; the novelty of the final biblical *Maranatha*; the two hands and ten fingers of the pianist; song and music for the spiritual journey and liturgy; the 144,000 voices of the hymns of Revelation. For nothing reaches the heart of God beyond words like perfect harmony when the final chord is sounded.

### Keywords

music, metaphor, spirituality, silence, chorus, transcendence

## 1. Introduction – Prelude

When Pope Francis<sup>1</sup> and the recent *Directory for Catholic Catechesis*<sup>2</sup> refer to the “way of beauty”, not only in theological, pastoral and catechetical activity, but also for the relationship of every being to God, it is in order to establish that life in the Holy Spirit makes human existence more coherent, just and authentic – according to the transcendentals of the one, the good and the true – and also more beautiful and filled with an unequalled splendour.<sup>3</sup> The beauty of the Spirit at work in human achievements and in the splendours of creation has an eminently salvific significance.

Among the various arts that can manifest the spirituality of the Gospel, through heritage works, contemporary productions<sup>4</sup> and cosmic realities, we have opted in this interdisciplinary contribution<sup>5</sup> for the *via pulchritudinis*

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<sup>1</sup> François, *Evangelii gaudium*, Apostolic Exhortation on the proclamation of the Gospel in today’s world, Rom 2013.

<sup>2</sup> Pontifical Council for the Promotion of the New Evangelisation, *Directoire pour la catéchèse [Directory for Catechesis]*, Rom 2020, n. 106–109.

<sup>3</sup> Cf. François, *Evangelii gaudium*, n. 167. On the *via pulchritudinis* for Christian spirituality, see in particular: Dominique Ponnau, *La beauté pour sacerdoce [The beauty for priesthood]*, Presses de la Renaissance, Paris 2004; Card. P. Poupard, Pontifical Council for Culture, *La voie de la beauté. Document de l’Assemblée plénière du Conseil pontifical de la culture de 2006 à Rome [The Way of Beauty. Document of the 2006 Plenary Assembly of the Pontifical Council for Culture in Rome]*, Salvator, Paris 2006; Collective, *L’expérience artistique. Un enjeu spirituel [The artistic experience. A spiritual issue]*, « Christus » 211 (2006); J. Cottin, *La mystique de l’art. Art et christianisme de 1900 à nos jours [The mystique of art. Art and Christianity from 1900 to today]*, Cerf, coll. Cerf Histoire, Paris 2007; R. Pousseur, Jean de Montalembert, J. Teissier, *Les cultures contemporaines, demeures de Dieu [Contemporary cultures, homes of God]*, DDB, Paris 2008; J. Cottin, W. Gräß, B. Schaller, (eds.), *Spiritualité contemporaine de l’art. Approches théologique, philosophique et pratique [Contemporary Spirituality in Art. Theological, philosophical and practical approaches]*, Labor et Fides, Genève 2012.

<sup>4</sup> On the relationship between today’s artistic works and Christian reflection, see in particular Jérôme Alexandre, *L’art contemporain, un vis-à-vis essentiel pour la foi [Contemporary Art, an Essential Counterpart for the Faith]*, Parole et Silence, coll. Collège des Bernardins – Cahiers de l’École cathédrale 92, Paris 2009.

<sup>5</sup> For which we rely on our fundamental reflection, “When art and faith come together”, in: F.-X. Amherdt, C. Rohner, *Arts et spiritualité en dialogue [Arts and spirituality in dialogue]*, Academic Press, coll. Théologie pratique en dialogue 46, Fribourg 2017, pp. 13–32. See also our two other books on this subject: F.-X. Amherdt, *Culture et foi en dialogue [Culture and Faith in Dialogue]*, Médiaspaul, coll. Vatican II pour tous, Paris 2015; and F.-X. Amherdt, P. M. de Marolles, J. Burin des Rozières, (eds.), *Pour une foi quelle culture?!*, Actes de la semaine interdisciplinaire de la Faculté de théologie de l’Université de Fribourg – 8 au 11 avril 2013 [For

*musicalis*,<sup>6</sup> according to our own experience as guitarist, singer and choir director.<sup>7</sup> In the midst of the cacophony of our world, we would like to identify some musical metaphors which, according to the pedagogy of Christ,<sup>8</sup> paradoxically point to the “unheard of” of God,<sup>9</sup> through images taken from the instrumental or vocal register.<sup>10</sup> In this way, we would like to follow the tradition of Saint Augustine, who, from the 4th century, valued the impact of music in the exercise of worship and the role of sacred song in bringing us closer to the Transcendent, through and beyond the pleasure of the senses;<sup>11</sup> in that of Gregory the Great and Benedictine tradition; then in that of the Protestant liturgy from Martin Luther onwards,<sup>12</sup> granting polyphonic choral singing a place of choice for the affirmation of faith; and therefore in that of the parabolic language, both vocal and instrumental, which the preceding pontiffs in particular, encouraged

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*a faith which culture?!*, Proceedings of the interdisciplinary week of the Faculty of Theology of the University of Fribourg – 8 to 11 April 2013], Academic Press, coll. Théologie pratique en dialogue 43, Fribourg 2015.

<sup>6</sup> On the path of musical beauty in its specificity, see among others M. Collins, D. Power (eds.), *La musique et l'expérience de Dieu [Music and the Experience of God]*, “Concilium” 222 (1989); Collective, *Liturgie, beauté, sens du sacré [Liturgy, beauty, sense of the sacred]*, “La Maison-Dieu” 233 (2003); and the teachings of Benedict XVI, *L'esprit de la musique [The Spirit of Music]*, Artège, Perpignan 2011.

<sup>7</sup> We taught classical guitar professionally for 31 years at the Conservatoire cantonal de musique in Sion, our town; we sang for 33 years in the *Schola* des petits chanteurs de Notre-Dame de Valère in Sion and for 15 years in the mixed choir *Novantiqua* in Sion, and in 1976 we founded the *Octuor Vocal de Sion*, a double quartet of a capella men's voices, which we are still directing after 48 years, and which has produced 11 CD recordings.

<sup>8</sup> See our work: F.-X. Amherdt, S. Mayoraz, *Parabole: Bible et pastorale. Les richesses de la pédagogie parabolique à l'image du Christ parabole [Parable: Bible and pastoral care. The riches of parabolic pedagogy in the image of Christ the parable]*, Saint-Augustin, coll. Perspectives pastorales 8, St-Maurice 2015.

<sup>9</sup> See our book: F.-X. Amherdt, *Les 12 inouïs de l'Évangile. Impulsions pour notre être chrétien [The 12 unheard-of things in the Gospel. Impulses for our Christian being]*, Parole et Silence, Paris / Les Plans-sur-Bex 2022.

<sup>10</sup> We ventured into the parabolic genre in a previous book, F.-X. Amherdt, *Dieu est musique. Chant et instruments comme parabole (Méditations III) [God is music. Song and Instruments as Parable (Meditations III)]*, Saint-Augustin, St-Maurice 2003.

<sup>11</sup> Saint Augustine, *De musica*, [http://jesusmarie.free.fr/augustin\\_musique\\_traite.html](http://jesusmarie.free.fr/augustin_musique_traite.html) (22.04.2023).

<sup>12</sup> See B. Reymond, *Le protestantisme et la musique. Musicalités de la Parole [Protestantism and Music. Musicalities of the Word]*, Labor et Fides, Geneva 2002.

to cultivate for the journey towards the sacred.<sup>13</sup> In order to give right to the register of spirituality, this short article adopts a poetic and evocative literary genre, encompassing and surpassing the purely rational discourse. We therefore place ourselves in the school of Paul Ricœur, who regularly refers to the parabolic register when dealing with scriptural language which, through borderline expressions and vivid metaphors, opens up to the extravagance of the Kingdom.<sup>14</sup>

We will unfold this search for musical spirituality in twelve short paragraphs, the first three around the mystery of God: “The sound of Silence; as a Trinitarian agreement; the 7 notes of the divine scale”; the next three around the life of man: “Four voice of humanity; five lines, one staff, one key; the rightness (justice) of the six strings”; then three more about the dialogue between the Lord and humans: “Transcendance; a stereophonic octet; make something new”; finally, the last three according to ecclesial and eschatological aesthetics: “With both hands; song and music for the spiritual journey and the liturgy; at 144,000 voices”, each time through an explicitly musical illustration.<sup>15</sup>

## 2. The sound of silence

It is in “*the voice of a quiet silence*” that the Lord manifests himself to the one who represents prophetism at the Transfiguration (with Moses, the bearer of the Law),<sup>16</sup> Elijah filled with a jealous zeal for God and his mission,<sup>17</sup> but not in the

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<sup>13</sup> See Benedict XVI, *Discours à l’occasion de la projection du documentaire “Art et foi – Via pulchritudinis”* (25 octobre 2012) [Speech on the occasion of the screening of the documentary “Art and Faith – Via pulchritudinis” (25 October 2012)], “Osservatore Romano” (27 octobre 2012), p. 7.

<sup>14</sup> See our two theses published in one volume: F.-X. Amherdt, *L’herméneutique philosophique de Paul Ricœur et son importance pour l’exégèse biblique. En débat avec la New Yale Theology School [Paul Ricoeur’s philosophical hermeneutics and its importance for biblical exegesis. In debate with the New Yale Theology School]*, Cerf / Saint-Augustin, coll. La nuit surveillée, Paris / St-Maurice 2004.

<sup>15</sup> This article is based on our published book on the subject, François-Xavier Amherdt, *Évangile et musique. La pastorale en accords [Gospel and music. The pastoral in chords]*, Saint-Augustin, coll. Perspectives pastorales 15, St-Maurice 2021.

<sup>16</sup> Matthew 17:4. We indicate only one Gospel reference, without systematically pointing out the parallels of the episode given in the other Synoptics or in the 4ème Gospel, in order to lighten our discourse, which is not intended to be exegetical in the strict sense.

<sup>17</sup> 1 Kings 19:11–12.



thunderous manifestations of the flashes of sensationalism, nor in the violent apparitions of the storms of intolerance, nor in the tumult of the (Russian-Ukrainian) wars. Beyond the hubbub of the universe, it is in the recollection of the deep heart that the ineffable groaning of the Spirit is received (in the chapter on life in the Spirit),<sup>18</sup> and that the Father and the Son (who dwell in us together),<sup>19</sup> dwell together in their inexpressible love. Just as it is from silence that the prelude and fugue spring, and it is in the intense silence that follows the final chord that the score culminates.

How much more should the liturgies, so often talkative and intellectual, leave room for spaces where the “real presence” of the Word in its resonance can be lodged! All spirituality is nourished in silent prayer, held in the secrecy of one’s room (not in an ostentatious manner),<sup>20</sup> or in a retreat of personal renewal, away from the crowd that oppressed him, like Jesus,<sup>21</sup> where the Lord can teach his ways and unite hearts beyond all the distraction (Blaise Pascal) and amusement (the being unified by the fear of the Lord).<sup>22</sup>

### 3. As a Trinitarian agreement

Few metaphors succeed in aiming at the mystery of one God in three Persons as pertinently as that of the single chord made up of three distinct sounds: the Father, tonic and creator; the Son, dominant (from *Dominus*, the Lord) and saviour; the Spirit, third and sanctifier. God is therefore music in himself, through his Trinitarian communion, and he infuses into the men he creates in his image (“Let us make man in our likeness”),<sup>23</sup> a triple love whose three notes have a similar importance: “You shall love your God with all your being and your neighbour as yourself.”<sup>24</sup> The third note of self-love, whether major or minor, is absolutely necessary in order for desire for the Lord and affection for others to be possible. God encourages people to develop their mental, physical

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<sup>18</sup> Cf. Romans 8:26.

<sup>19</sup> Cf. John 14:23.

<sup>20</sup> Cf. Matthew 6:6.

<sup>21</sup> Cf. Matthew 14:23.

<sup>22</sup> Cf. Psalm 86(85):11.

<sup>23</sup> Genesis 1:26.

<sup>24</sup> Cf. Mark 12:28–31.

and psychic potential, to allow themselves to be generated to their human and spiritual identity,<sup>25</sup> provided that they use this happiness as a springboard to decentre themselves and to love.

As the encyclical *Fratelli tutti*<sup>26</sup> makes clear, humanity is called to the pastoral care of harmony and balance, in social friendship and universal brotherhood. If one voice in a choir is not well balanced, the whole harmony suffers. Community relations have a truly therapeutic value, according to “the ‘mystique’ of living together, of mixing, of meeting, of hugging, of supporting one another.”<sup>27</sup> Authentic faith in the Incarnate Word is intrinsically associated with reconciliation with the flesh of others and with community service. “Let us not allow ourselves to be robbed of sound communion or of the ecclesial community”, we can exclaim, imitating the cry of the Argentine pontiff!<sup>28</sup>

#### 4. The 7 notes of the divine scale

Just as there are seven days in the week, seven gifts of the Holy Spirit, seven (+1) beatitudes,<sup>29</sup> seven sacraments, seven colours in the rainbow of the Covenant, seven branches of the candelabra, seven stars in the constellation of the Pleiades, so the scale has seven notes with which it is possible to compose all the concerts in the world. Of course, it would also be possible to mention the pentatonic scale

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<sup>25</sup> According to the perspective of the so-called “Life-giving pastoral.” See the two founding works edited by the Jesuit theologians P. Bacq and Ch. Theobald, *Une nouvelle chance pour l’Évangile. Vers une pastorale d’engendrement [A new chance for the Gospel. Towards a pastoral of engenderment]*; and *Passeurs d’Évangile. Autour d’une pastorale d’engendrement [Passers-by of the Gospel. Around a pastoral of engenderment]*, Lumen Vitae / Novalis / L’Atelier, coll. Théologies pratiques, Brussels / Montreal / Paris 2004 and 2008; as well as our book F. X. Amherdt and M.-A. de Matteo, *S’ouvrir à la fécondité de l’Esprit. Fondements d’une pastorale d’engendrement [Opening ourselves to the fruitfulness of the Spirit. Foundations of a life-giving pastoral]*, Saint-Augustin, coll. Perspectives pastorales 4, St-Maurice 2009.

<sup>26</sup> François, *Fratelli tutti*, Encyclical letter on fraternity and social friendship, Rom 2020.

<sup>27</sup> François, *Evangelii gaudium*, n. 87.

<sup>28</sup> Cf. François, *Evangelii gaudium*, n. 88; 92.

<sup>29</sup> See for an association between these three septenaries our book: F.-X. Amherdt, *7 jours – 7 dons – 7 béatitudes. Vivre le bonheur dans l’Esprit au quotidien. En contact constant avec le Seigneur, notre trésor [7 days – 7 gifts – 7 beatitudes. Living happiness in the Spirit in daily life. In constant contact with the Lord, our treasure]*, LIT, coll. Recherches pastorales 4, München / Münster / Vienna / Zürich 2020.

used in the music of many Asian and African countries, in addition to the seven-note diatonic scale, in order to take into account musical universalism without continental borders. These are the seven notes of the call to unity in Ephesians: one body and one Spirit, one hope, one Lord (Christ), one faith, one baptism, one God and Father of all, above all, through all and in all.<sup>30</sup> These are the seven terms of the song sung by the whole of earthly and heavenly creatures to the First from the dead in the last book of Revelation: “Worthy is the Lamb that was slain to receive power, wealth, wisdom, strength, honour, glory and praise.”<sup>31</sup>

Let us spiritually spell out the seven words of the Trinitarian scale: Do (C), as in *Dominus* (already mentioned), the Most High and Master of all, on whom the building rests, without whom we can do nothing (like the branch without the vine);<sup>32</sup> Re (D), as the tireless repetition of musical groups, from the Latin *re-petere*, to ask unceasingly until men open themselves to the divine will, in the perseverance that obtains life (beyond all false anxiety);<sup>33</sup> Mi (M), as miracles, that of Mozart’s genius, or those of the wonders that the Spirit accomplishes by attesting to the spirit of human beings that they are children and heirs of the Abba-Father;<sup>34</sup> Fa (F), as families of the choirs and ecclesial communities, from Nazareth and everywhere, of the baptised invited to the banquet of the Eucharist (according to the parable of the feast)<sup>35</sup> and to the wedding supper of the Lamb;<sup>36</sup> or Sol (G), as soloists, like Abraham, Moses, David and John the Baptist; or as solfeggio, so patiently learned by apprentice musicians; or as solicitude of the Good Shepherd who recognises each sheep by its particular timbre (in the chapter on the Good Shepherd);<sup>37</sup> or as sunshine like Christ, the new star that comes to visit us (in Zechariah’s canticle, the *Benedictus*);<sup>38</sup> La (A), as latitudes beyond borders, those of Argentina, where the Bishop of Rome hails from, those of Ukraine, which suffers with all of Europe, those of India, China or Japan, of Africa, Australia and the Americas; in the image of the Church that

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<sup>30</sup> Ephesians 4:4–6.

<sup>31</sup> Revelation 5:12.

<sup>32</sup> Cf. John 15:5.

<sup>33</sup> Cf. Luke 21:19.

<sup>34</sup> Cf. Romans 8:15–17.

<sup>35</sup> Luke 14:16–26.

<sup>36</sup> Cf. Revelation 19:19.

<sup>37</sup> Cf. John 10:3–4.

<sup>38</sup> Cf. Luke 1:78–79.

is jubilant because it is truly universal; finally, Si (B), as (once again) silence, that of the middle of the night that envelops all things, where the powerful light that envelops the earth arises (according to the sapiential meditation on the history of salvation),<sup>39</sup> the silence in which the singers are suspended before their director gives them the impulse.

With this Trinitarian scale, it is possible to compose the melody of the specific happiness of each person, since no one is a photocopy but an original, says the Bishop of Rome to young people.<sup>40</sup> Each one has a personal vocation, a white stone on which is written the name that only the one who has received it knows (in the 3<sup>ème</sup> letter to the Church of Pergamum),<sup>41</sup> a particular mission.

## 5. Four voices of humanity

After these three touches which are focused on God, here are three more which focus upon man. First, the number 4 of humanity (the four cardinal points, the four winds of the prophets,<sup>42</sup> the four elements or the four seasons) which, added to the number 3 of the Trinity, gives the fullness of the number 7 mentioned above. A choir usually has four voices, a symphony orchestra four registers (strings, winds, brass, percussion).

These are the four voices of humanity and of the Church: first, the lower ones that ensure the solidity of the building, like the creative light that illuminates the cosmos (in the first creation story):<sup>43</sup> the founders of associations, the pioneers of companies, the fathers and mothers of families, the leaders of communities; then the tenors, a word that comes from “tenue”, the voice that in polyphony holds the theme, like the peace between nations towards which history tends,<sup>44</sup> the peace of harmony resulting from the palavers and interethnic national conferences after a conflict; then the altos, low, humble and self-effacing, sometimes enigmatic and disturbing, but absolutely necessary, like the freedom so often

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<sup>39</sup> Cf. Wisdom 18:14.

<sup>40</sup> François, *Christus vivit*, Post-Synodal Apostolic Exhortation to the Youth and All the People of God, Rom 2019, n. 106–162.

<sup>41</sup> Cf. Revelation 2:17.

<sup>42</sup> Zechariah 2:10.

<sup>43</sup> Cf. Genesis 1:3.

<sup>44</sup> In the eschatological oracle of Micah 4:1–5.

swallowed up, but characteristic of human dignity; finally the sopranos, the crowning glory of the sound construction, like the cry of divine mercy that prevails over hatred, a limpid timbre that brings together love and truth, concord and peace, and gives the fruit of the earth when heaven leans towards it.<sup>45</sup>

In the harmony of Christmas, Emmanuel, ‘God with us,’ takes on human flesh in order that man and woman may become God (so that we may share in the divine nature).<sup>46</sup> *O admirabile commercium, o magnum mysterium*, to use the title of many Latin motets.

No parable is more evocative of the communion between generations than that of an ensemble, bringing together singers and musicians of all ages for a single concert. It is the family of those who listen to the Word and respond to it with their art,<sup>47</sup> beyond differences of gender and condition, denominations, churches and traditions.

## 6. Five lines, one staff, one key

The term is also evocative: to let oneself be “carried” by the *Amen* of truth, for example at the end of prayers, which means: “Yes, I adhere, it is solid and it holds”, like the melody that only makes sense if the notes that make it up, are inscribed on the five lines of a staff. Five lines like the five scrolls of the divine Law (the Pentateuch) or the five speeches of Jesus, the new Moses, in the 1<sup>st</sup> gospel, to sing to the Lord from all parts of our being, under the baton of the Spirit.

1<sup>st</sup> line: the body. The action of the Holy Breath passes through our mouths, our chests, our hands, our legs: “You shall sing and play to the Lord your God with all your strength, with all your vigour, with all your energy and with all your body.”<sup>48</sup>

2<sup>nd</sup> line: the heart. In addition to technique, phrasing is needed, the finesse of execution “by heart”, masculine or feminine suppleness, that delicacy which brings a sequence to life with gentleness and impetus: “You shall praise the Lord with all your heart.”

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<sup>45</sup> Cf. Psalm 85(84):11–13.

<sup>46</sup> Cf. 2 Pet 1:4.

<sup>47</sup> Cf. Mark 3:31–37.

<sup>48</sup> Like the great Gospel commandment in Luke 10:27.

3<sup>rd</sup> line: the spirit. Moreover, much depends on the spirit of the choir or instrumental ensemble: all members should pull the same rope – if it is possible to express it that way – and seek to serve the dynamics of the group: “You shall praise the Lord with all your spirit.”

4<sup>th</sup> line: the soul. However, the essential is still missing, that “supplement of soul” that makes an exceptional training, that ideal that polarises the commitment of each person. For in the end, expressing oneself, playing, is a question of “faith”, one must believe in it to touch others: “You shall love the Lord your God with all your soul.”

5<sup>th</sup> line: the director. All the vital energies mobilised are only crystallised if they are channelled by the director or conductor, to whose gestures all the musicians are attached. It is he/she who, from the multitude of choristers and instrumentalists, makes one heart and one soul (as in the primitive communities).<sup>49</sup> This is what is achieved by the grace of the Spirit, who gives all anthropological potentialities their coherence, protects beings from the beginning to the end of their individual and community work (the Lord, our guardian)<sup>50</sup> and guides their artistic impulses.

The key: Something else is obviously missing, without which the written notes would not sing: it is the key of Sol (G), Fa (F) or Do (C), written at the beginning of each system. Would it be possible to affirm that this key is Jesus Christ who gives existences their correct pitch?

From the score to the performance, there is interpretation. For song, as for the Bible, it is the Spirit who makes it possible to ‘incarnate’ the written work and who, on the skeleton of notes and letters, adds the flesh of the chords, waking them from their sleep and making the living music ‘rise’ in a kind of (re) surrection. Music makes us live and brings us to life.

For it is the same inspiration that drives today’s scriptural writers, commentators and congregations, just as it is the same breath that rests on the composer, fills the performer and inhabits the listeners. The power of music in this respect is impressive. How many instrumentalists have experienced this, with interludes offered for groups during the confinement of the recent pandemic? The musical flow of love, put into notes, moves even the most indifferent listeners and literally sets them in motion (*ex-movere* in Latin).

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<sup>49</sup> Cf. Acts 4:32.

<sup>50</sup> Cf. Psalm 121(120),7–8.

Hence the call to the composers of the 21<sup>st</sup> century to apply themselves, as in previous eras, to enhancing the liturgy. Inspired, they become inspiring, as much to arouse shared joy as to accompany pain (unlike the children of the Gospel, cf. Matthew 11:16–19). May prophets arise who are capable of writing pieces that turn us towards him who is the Way, the Truth and the Life!<sup>51</sup> Music will save humanity; it is divine music that carries it.

## 7. The rightness (justice) of the six strings

Just as the six strings of a guitar each have their own sound, and the tuning of all of them is indispensable for the sound of the chord to be correct, and tuning requires extreme precision, takes a great deal of time, and must be repeated day after day, especially when the temperature varies, in order that the members of the body, according to the Pauline metaphor evocative of mankind,<sup>52</sup> each have their own value, even the weakest and most hidden ones: harmony between them benefits the good of the whole organism, and understanding is always to be sought. We are all the body of Christ, each in his own way.<sup>53</sup>

The names of the strings must be learned from the beginning of the work with the instrument, so that the other notes can be memorised; in the same way, the good Shepherd knows each sheep by name and they know him, because he goes so far as to give his life to lead them to the promised pasture (unlike the bad shepherds).<sup>54</sup> Each person has his or her own unique sound, which even the most perfect imitators cannot reproduce perfectly. Elvis Presley is not Johnny Halliday, Patricia Kaas does not sound like Jane Birkin, if such allusions to the *hit parade* of English or French songs, are permitted.

It is in the depths of being that the particular melody of existence is discovered, the “vocation” in the sense that it is God himself who calls (*vocare* in Latin, like little Samuel, cf. 1 Samuel 3), and that human life consists of responding

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<sup>51</sup> Cf. John 14:6.

<sup>52</sup> 1 Corinthians 12.

<sup>53</sup> Cf. 1 Corinthians 12:27. See Paul de Surgy and Maurice Carrez, *La Bible. Les épîtres de Paul*, vol. I: *Corinthiens* [*The Bible. Paul's epistles*, vol. I: *Corinthians*], Bayard / Centurion / Novalis, coll. Commentaires, Paris / Outremont 1996.

<sup>54</sup> Cf. John 10:1–18.

to him, of co-responding to his voice, of assuming its “responsibilities.” In order for the central commandment of Israel, “Listen to the voice of the Lord your God”<sup>55</sup> to be fulfilled, it is necessary for megaphones, loudspeakers, prophets who speak in his name before the people (this is the meaning of *pro-phèmi* in Greek) to appear.<sup>56</sup>

The awakening of every vocation, is therefore eminently sonorous and musical. It is a question of resonance in echo, in “catechesis”, as is the beautiful Greek etymology of the term *kate-echô*, or in “sympathy”, like guitars that begin to vibrate because a sound is emitted in their presence on the same wavelength as them, without even plucking the strings (from the Greek *sun-pathein*, to experience with). It is by cultivating an intense interior life in the midst of the Babel of postmodern noise, that the man of today succeeds in perceiving the melody of the Lord, who has always sought to sing in each one.

The voice of beauty is indeed that which brings beings into “con-sonance” through the emission of the Spirit and its energy, in the original sense of working within (*en-ergon*). “At the heart of this world, the breath of the Spirit puts new energies to work today”, sing the poet Didier Rimaud and the composer Jacques Berthier.<sup>57</sup>

## 8. Transcendence

“Sing to God with all your heart in Psalms, hymns and free praises. And whatever you may say or do [whether you play the trombone or join a choir], let it always be in the name of the Lord Jesus, giving thanks to the Father God through him.”<sup>58</sup>

As the two cymbals clash for the brilliance of the rhythms, as the two hands clap together for the cries of joy, so do God and man join together to communicate grace and “give it back”, the three following bursts say it in their own way. The crystalline timbre of a little singer or the flight of a violin leads beyond

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<sup>55</sup> Deuteronomy 6:4.

<sup>56</sup> See for example Jean-Pierre Prévost, *Pour lire les prophètes [To read the prophets]*, Cerf / Novalis, Paris / Ottawa 1995.

<sup>57</sup> D. Rimaud and J. Berthier, *Messe pour un rassemblement [Mass for a gathering]*, Studio SM, Paris.

<sup>58</sup> Colossians 3:16.



words: “Brothers, let us sing so that we may look up to heaven a little”, exhorts the prayer of the *Pueri cantores*. Music leads us to the “unseen” of God, to “what the eye has not seen, what the ear has not heard, what has not come to the heart of man, what God has prepared for those who love him.”<sup>59</sup>

“*Via pulchritudinis musicalis*”: the flash of a chord, the seizure of a melody, thanks to volatile sounds – unlike the other arts which are all inscribed in matter – trace a path towards God and let us prefigure the eternal plenitude, in the music of the Spirit accompanying the beatific vision, humans facing God, similar to him and seeing him as he is.<sup>60</sup>

Already in everyday life, God’s holiness clothes people with his glory, as the halo of the men and women saints suggests. Children’s voices have the power to open the heavens, to let the Father’s voice speak to us, as in the baptism of Jesus in the Jordan, and to make the Spirit descend like a dove upon our heads.<sup>61</sup> Ah, if you were to tear the heavens apart, if the clouds were to rain down the cessation of fighting, honesty and respect, if the earth were to open up and produce the seeds of a happy future for the multitudes:<sup>62</sup> behold, when a choir of toddlers gives its all, the prophecy is already coming true!

It is the heavenly music of the melodious harp which, as in the Psalms, captures the divine intimacy with its myriad of low and high strings.<sup>63</sup> It is the song of the Spirit who pacifies the soul (the promise of the Paraclete who bears witness to Christ),<sup>64</sup> who intercedes for all human beings when they do not know what to say: the Father understands (for the Spirit speaks the divine language).<sup>65</sup> It is the dynamics of the dance, on the two legs of the body that follow the parallelism of the Psalms, that turn like the great David, the singer of the divine hymns, to the sound of all the cypress wood instruments, zithers, harps, drums, sistrums and cymbals,<sup>66</sup> that move as the Lord of the universe

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<sup>59</sup> 1 Corinthians 2:9. To quote from the opening of our other book mentioned above: F.-X. Amherdt, *Les 12 inouïs de l’Évangile. Impulsions pour notre être chrétien [The 12 unheard-of things in the Gospel. Impulses for our Christian being]*.

<sup>60</sup> Cf. 1 John 3:2.

<sup>61</sup> Cf. Mark 1:9–10.

<sup>62</sup> In the oracle of 2ème Isaiah, cf. Isaiah 45:8.

<sup>63</sup> Cf. Psalm 150:3.

<sup>64</sup> Cf. John 15:26.

<sup>65</sup> Cf. Romans 8:26–27.

<sup>66</sup> Cf. 2 Samuel 6:5.

gives the example: “Do not be afraid, Zion! The Lord your God is in you; he is the hero who brings salvation. He will have his joy and his gladness in you [...]; he will dance for you and rejoice.”<sup>67</sup>

To counter the postmodern siren song, the composition of “humanising music” must prevail: “Your great duty,” Francis tells young people, “is to respond to the paralysing refrains of *cultural consumerism* with dynamic and strong choices, with research, knowledge and sharing.”<sup>68</sup>

## 9. A stereophonic octet

To the music of the divine will, the beings here on earth are invited to respond like a double choir by Gabrieli on the two galleries of St Mark’s Cathedral in Venice. Like a vocal octet divided into two quartets, the first representing the song of the angels, and the second exactly replicating it, with humanity, in an *Alleluia* by Jacobus Gallus. Like Joseph, who does not say a word in the four Gospels<sup>69</sup> but who is fully attuned to the word of the divine messenger speaking to him through the melody of sounds: he effaces himself before the mystery of the Presence and offers an immediate and absolute echo.<sup>70</sup>

It is beautiful, these choirs called “L’Écho”! They respond to the Trinitarian invitation to bring people to join them in unanimous praise. A vocal – or instrumental – octet resembles a Carthusian convent: each performs his or her part as a soloist but seeks to merge, like monks living as communal hermits, so to speak. All are Thomases, ‘Didymus’ or twins of Christ (the apostle Thomas, unbelieving but believing),<sup>71</sup> called to resemble him even in his tone, to be

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<sup>67</sup> Zephaniah 3:16–17.

<sup>68</sup> François, *Discours de la rencontre avec les étudiants et le monde académique sur la Piazza San Domenico à Bologne (1er octobre 2017)* [Address at the meeting with students and the academic world in Piazza San Domenico in Bologna (1er October 2017)], in: *Christus Vivit*, n. 223.

<sup>69</sup> See P. Lefebvre, *Joseph. L’éloquence d’un taciturne* [Joseph. The eloquence of a taciturn], Salvator, coll. Bible en main, Paris 2013.

<sup>70</sup> See François, *Patris corde*, Apostolic Letter for the year 2020–2021, dedicated to the adoptive father of Jesus. Rom 8 December 2020.

<sup>71</sup> Cf. John 20:24.

drawn to the Father's house where there are many singing dwellings (in Christ's testament after the washing of the feet).<sup>72</sup>

It is the marvel of complicity, like that of the English group *The King's Singers* from London, from which the Vocal Octuor of Sion humbly draws its inspiration: they arrive on stage, and without giving each other a tone, without looking at each other, they start at exactly the same time; they breathe together, they pronounce the last syllable at exactly the same moment. All this with a dazzling casualness, a fascinating inner emotion, a very *British humour*, of course.<sup>73</sup> It is the splendour of multiple voices, such as the forty-two voices of Thomas Tallis' motet "*Spem in Alium*", the "hope in this Other", which gives breath and cohesion! When a full cathedral resounds thanks to the singers spread around it or to the "*Gloria in excelsis Deo*" of the "Angels in our countryside", at the midnight mass of the Nativity, the Kingdom is really already present!

## 10. Make something new

"Make something new today! This is the call of life. In your hands has blown a wind of freedom. Make something new today." This invitation from a song by the French composer Patrick Richard<sup>74</sup> urges today's actors to change their wineskins, since at Christ's wedding with the Church, the wine is always new (according to Jesus' teaching to the Pharisees).<sup>75</sup> All the more so, since the end of the Covid-19 crisis requires us to "reinvent" ourselves everywhere, according to the expression that has become commonplace, including for choral and instrumental groups.<sup>76</sup>

The Bible ends, or rather opens with a final cry, an imperative: "*Maranatha, come Lord Jesus*",<sup>77</sup> hence the attitude required at all times: to watch over and

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<sup>72</sup> Cf. John 14:2.12.

<sup>73</sup> <https://www.kingssingers.com/> (22.04.2023).

<sup>74</sup> P. Richard (music) and M. Goutagny (lyrics), *Fais du neuf [Make something new]*, in: *Chantons en Église*, n. 10047, Studio SM, Paris.

<sup>75</sup> Cf. Mark 2:21–22.

<sup>76</sup> See H. Derroitte and C. Chevalier (eds.), *La crise de la Covid et ses impacts en pastorale [The Covid Crisis and its Impact on Pastoral Care]*, "Lumen Vitae" 76 (1/2021), pp. 1–120.

<sup>77</sup> Revelation 22:20.

cultivate one's musical, vocal, personal and community talents.<sup>78</sup> Choirs also act as “committees of vigilance”, like watchmen at the battlements of history (according to the posture of the prophets),<sup>79</sup> to build up their reserves of melodies for the future, like the wise virgins (according to the parable of the last eschatological discourse in the first Gospel):<sup>80</sup> “to maintain” a repertoire, “to sustain” the hope of the assemblies and “to keep alive” the desire for the eternal wedding. We are looking forward to new popular gatherings, spiritual “Schubertiades”, such as the new World Youth Days, national, continental and international, where, as in the case of the ecumenical community of Taizé in France, the canons are raised, the refrains are repeated endlessly in *ostinato*, without weariness, to match the breath of bodies and hearts.

Of course, this melody resounds “like a fragile breath” in the midst of the tumult of the powerful.<sup>81</sup> The wind of the Spirit blows where it will, we hear its melody without knowing where it comes from or where it is going (in the conversation with Nicodemus).<sup>82</sup> But he constantly and courageously inspires that “*new song*” which the Psalms exhort us to compose.<sup>83</sup> The Virgin of the Annunciation and the Assumption experienced this by risking the revolutionary canticle of her *Magnificat*:<sup>84</sup> Mary, the soloist, leads behind her, the humiliated who are lifted up, the hungry who are satisfied and the poor who are fulfilled. She provokes the invention of new songs, the writing of the 151<sup>st</sup> Psalm, and new creations, such as the mass for the consecration of the new bishop of Sion, composed by the deacon musician and director of “Nov-antiqua”, Bernard Héritier. To draw upon, as the name of the Nov-antiqua choir indicates, “*new and old*” from the treasure of humanity.<sup>85</sup> To make the litanies of the saints resound across the planet, as I had the chance to experience during my own

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<sup>78</sup> Cf. Matthew 25:14–30.

<sup>79</sup> Cf. Jeremiah 6:17.

<sup>80</sup> Cf. Matthew 25:1–13.

<sup>81</sup> According to the text of the assembly song *Comme un souffle fragile*, Pierre Jacob (lyrics), Gaëtan de Courrèges (music) and François Rauber (harmonisation), *Comme un souffle fragile [Like a fragile breeze]*, U45, Éditions musicales Auvidis, Paris.

<sup>82</sup> Cf. John 3:8.

<sup>83</sup> Psalm 33(32),149.

<sup>84</sup> Luke 1:39–56.

<sup>85</sup> Cf. Matthew 13:52.

priestly ordination at Sion airfield, with the Polish *pontifex* John Paul II and 50,000 faithful gathered at the moment of prostration.

## 11. With both hands

Finally, three final musical flashes turned towards the ultimate Kingdom. First, the two hands coordinated to make a sound on the guitar, two hands that complement each other on the piano keyboard, the hand of the Son and the hand of the Father that unite in the same musical gesture of welcome, since they are both one.<sup>86</sup> Ten fingers to remember the ten commandments “by heart” (according to the Law of Sinai)<sup>87</sup> and to forbid man to make idols in his own image, for these have mouths and do not speak, ears and do not hear.<sup>88</sup> While the Lord of the Covenant alone liberates, he speaks to all as to Moses and hears the cry of the suffering, such as that of the Israelites (or Palestinians and Ukrainians) in their misery (under Egyptian oppression, at the beginning of the book of Exodus).<sup>89</sup> And freedom can be hummed and danced to: “Listen, Lord, have mercy on me! You have turned my mourning into a dance, my funeral clothes into an ornament of joy. Let not my heart grow weary, let it celebrate for you.”<sup>90</sup>

What are *show business* stars and *bel canto divas* but human beings made of flesh who can hardly bring salvation? Look at the manner in which the ‘god’ Michael Jackson sadly ended up. The Psalms laugh at idols and use sensory and aural comparisons to ridicule human-faced deities. “The idols of pearl, gold and silver: a work of human hands. They have mouths and do not speak, they have eyes and do not see, they have ears and do not hear, hands but do not touch, feet but do not walk, from their mouths not a murmur.”<sup>91</sup>

The biblical God enters into dialogue with people, he needs their contribution, he “is with them” (Emmanuel) in their concerts and celebrations, but he never

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<sup>86</sup> Cf. John 10:30.

<sup>87</sup> Cf. Exodus 20:1–17.

<sup>88</sup> Cf. Psalm 115(113B):4–7.

<sup>89</sup> Cf. Exodus 3:7–10.

<sup>90</sup> Psalm 30(29):11–13.

<sup>91</sup> Psalm 115(113B),4–7.

sings in their place, he hopes for their voices and desires their requests. The *via pulchritudinis* passes through the spirituality of true prayer.<sup>92</sup>

## 12. Song and music for the spiritual journey and the liturgy

“Shout for joy to the Lord, you righteous men! Praise the Lord, you righteous men! Give thanks to the Lord on the zither, play for him on the ten-stringed harp. Sing to him the new song; with all your art sustain the ovation.”<sup>93</sup>

It is not only the organ – so admirable – that is used in liturgy: strings, flutes, zithers, drums and cymbals are also required. In regions where fanfares and harmonies flourish, why not make more use of these ensembles or of small groups (trios, quartets and quintets) to enliven festive celebrations, at Christmas or Easter, at weddings and funerals? The “Semaine romande de musique et de liturgie” at the Abbey of St-Maurice in Switzerland has, for years, offered workshops on “guitar and instruments” or “dance in liturgy.”<sup>94</sup>

The Psalms deserve to be sung much more in the liturgy than is currently the case, supported by instruments, since this is the etymology of the Greek term *psalmos*, as expressed in the headings of many of the poems (e.g. the series from Psalm 51(50) to Psalm 69(68)): “From the Master of Song. On stringed instruments. Song of David. Half-voiced”).

All the rituals, as the classical and recent Masses remind us, are punctuated by song, from the *Kyrie* (“Jesus Master, have mercy on us”) to the *Gloria* (the tenth Samaritan leper who returns and glorifies God aloud, unlike the nine others who were also healed);<sup>95</sup> from the *Sanctus* (the song of the *seraphim* in Isaiah’s vision (on the occasion of his calling)<sup>96</sup> taken up by the living in the Apocalypse (before the throne of the Ancient One)<sup>97</sup>), to the *Agnus*, the paschal lamb<sup>98</sup> who

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<sup>92</sup> See in particular M. Rondet, *Petit guide de la prière [A short guide to prayer]*, DDB, coll. Prier, Paris 2000.

<sup>93</sup> Psalm 33(32):1–3.

<sup>94</sup> <http://www.srml.ch/> (22.04.2023).

<sup>95</sup> Luke 17:11–19.

<sup>96</sup> Isaiah 6:3.

<sup>97</sup> Revelation 4:8.

<sup>98</sup> Cf. Exodus 12:1–28.

bears the sin of the world (as John the Baptist designates him).<sup>99</sup> All vigils, prayer meetings and community celebrations are punctuated by instrumental pieces to clothe the soul and fit into the inner spiritual process. When analysed, the great works of the repertoire lead to an understanding of the mystery in a literally “mystagogic” process (from the Greek *ago*, to bring). The groups memorise the songs, especially if they are woven with biblical words, like the cantilenas of Joseph Gélineau, for example.<sup>100</sup>

The refrains and *alleluias* taken up as echoes of Scripture spring from the lips of children, even in the playground, on the way to school or in the shower. A hymn with several stanzas can recapitulate a catechetical sequence. There is no substitute for the word being chewed, ruminated upon, and taken up in chorus, in order to make it one’s own, or for instruments being brought together, xylophones, percussion instruments, recorders, in order to form a group around Christ.

### 13. At 144,000 voices

It is no longer with 42, but with 144,000 voices (12 x 12 x 1,000, the number of infinity), under the baton of the glorified Lamb, near the throne of the Ancient One, inhabited by the seven spirits of the Holy Trinity, that the multitude will exclaim in heaven. It is an immense crowd that no one can count, of all nations, races, peoples and languages (the four terms of humanity) that will constitute the “eschatological” choir. This is why the Apocalypse is full of hymns, with the 12 + 12 elders of the Old and New Testaments (4,11).<sup>101</sup> The *Prayer of the Present Time* (the old Breviary) regularly proposes them at vespers.<sup>102</sup> What will the risen ones do in Paradise? They will all sing, at last and for ever, with the myriads of angels, for the definitive triumph over evil and death.

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<sup>99</sup> Cf. John 1:29.36.

<sup>100</sup> J. Gélineau, *Les cantilènes bibliques pour la catéchèse [Biblical canticles for catechesis]*, CD of 28 songs and 72 page booklet, Studio SM, Paris 2010.

<sup>101</sup> See the collective work we edited: F.-X. Amherdt (ed.), *L'Apocalypse révélée [The Revelation of the Apocalypse]*, Saint-Augustin, coll. Les Cahiers de l'ABC 10, St-Maurice 2022, especially chapter 3 by J.-M. Poffet, *Les Cantiques de l'Apocalypse. Ou comment garder les pieds sur terre en étant branchés sur le ciel... [The Canticles of Revelation. Or how to keep your feet on the ground while being connected to heaven...]*, pp. 62–82.

<sup>102</sup> Revelation 5:9–12; 11:17–18; 12:10–12; 15:3b–4.

The catastrophes and plagues, similar to the ten plagues of Egypt, under the influence of the Babylonian mother of all prostitutes, are only the prelude to the nuptial canticles that nothing can ever interrupt. “For he has taken possession of his kingdom, the Lord God, the Lord of all. Let us be glad and rejoice, let us give glory to God, for this is the marriage of the Lamb, and his bride has been made beautiful: she has been clothed in bright white linen.”<sup>103</sup> This is a reason to rejoice in joining the Jerusalem that has come down from on high,<sup>104</sup> in the final Zion with the twelve gates,<sup>105</sup> in the new heavens and the new earth.<sup>106</sup> As victors over death, the elect will receive all the gifts promised by the faithful witness, the Alpha and Omega, the New Adam, in the letters to the seven Churches (2–3): the fruit of the tree of Paradise; the crown of life; the hidden manna and the personal name engraved on the white stone; the morning star; the white of victory; the temple with the pillars engraved with the name of the divine city; and the throne of the Father next to the victorious Son. What an enchanting prospect!

## 14. Conclusion – Postlude

“What you sing with your lips (or play with your hands), believe in your heart; and what you believe in your heart, prove it by your actions.” The motto of the Little Singers (*Pueri Cantores*) sums up this journey of musical spirituality. The *via pulchritudinis musicalis* seeks to express the mystery that has been hidden for centuries, but which has now been made manifest to humanity (according to the finale of the great Pauline epistle),<sup>107</sup> so that the melody of the lips and instruments may penetrate the innermost depths of our being and mark out the holiness of all in our daily lives (cf. *Gaudete et exsultate*).<sup>108</sup>

“But we Christians”, declares the South American pontiff, “cannot hide the fact that if the music of the Gospel ceases to vibrate in our hearts, we will have

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<sup>103</sup> Revelation 19:6–8.

<sup>104</sup> Revelation 21:2.

<sup>105</sup> Revelation 21:12–13.

<sup>106</sup> Revelation 21:1.

<sup>107</sup> Cf. Romans 16:25–27.

<sup>108</sup> François, *Gaudete et exsultate*, Apostolic Exhortation on the Call to Holiness in the Present World, Rom 2018.



lost the joy that springs from compassion, the tenderness that is born of trust, the capacity for reconciliation that finds its source in knowing that we are always forgiven and sent.<sup>109</sup>

Those who bear the name of Christ cannot claim any prerogative. On the contrary, they are responsible for the advancement of the Kingdom, carried by the ultimate fundamental note of the loving adoration of God,<sup>110</sup> of that universal musical brotherhood which will make it possible to compose the symphony of “that new world where we shall all be brothers [and sisters], where there will be room for each of the outcasts of our societies, where [the songs of] justice and peace will shine forth.”<sup>111</sup>

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<sup>109</sup> François, *Fratelli tutti*, n. 277.

<sup>110</sup> Cf. François, *Fratelli tutti*, n. 272.

<sup>111</sup> François, *Fratelli tutti*, n. 278.

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# **Implications of Reductive Anthropology for Religion (The perspective of Catholic personalism in Poland at the turn of the 20th and 21st Centuries)**

## **Abstract**

Experiencing the drama of being internally conflicted, postmodern people move away not only from God and religion, but also from the nature of other people. And yet, man cannot exist in an ideological or religious vacuum. This article reflects on the anthropological roots of the negation and affirmation of God and religion. The truth about religion is inextricably linked to the truth about man, and the question of perceiving man as a religious being is one of the important issues of philosophical anthropology.

## **Keywords**

God, man, faith, anthropology, atheism, religion

## 1. Introduction

Torn between body and soul, faith and doubt in God, passing time and eternity, and finally the animal and rational part of his nature, man does not cease to be, especially to himself, an insistent question. This question sounds particularly insistent in the epoch succumbing to the mirages of Promethean atheism, which, in the name of enhancing man's value, prophesies the end of God, stating at the same time that religion dehumanizes and enslaves him.<sup>1</sup> In the postmodern version, the goal of a secular pilgrimage is no longer the salvation of the soul, but the realization of the possibilities contained in the natural world.<sup>2</sup> The postmodern "nomad", devoid of a set goal, has little in common with the biblical Abraham wandering towards the unknown but promised by God land.<sup>3</sup>

Experiencing the drama of being internally conflicted, postmodern people move away not only from God and religion, but also from the nature of other people. And yet, man cannot exist in an ideological and religious vacuum. When his final horizon becomes foggy, he begins, sometimes desperately, to attribute a transcendent dimension to things that are transient by nature. Haunted by the same fears as people from previous eras – suffering, death or evanescence – he does not want to think and talk about such difficult topics. He willingly accepts a narrative that identifies the meaning of life with subjective happiness, or even with experiencing the state of pleasure.

From the point of view of Christianity, as indeed also of other great religions, the search for the meaning of life is, in fact, a search for God. This may imply finding Him and denying Him. A suggestive metaphor imposes itself here: of the world's great theatre as an illusion into which we have been thrown, as essentially dramatic beings. The fundamental question remains whether the source of this drama is an accident or someone's decision, the initiative of a being that transcends us – God.<sup>4</sup>

In this theatre, a dramatic and fascinating story, full of faith and doubt, flashes of light and moments of darkness, invariably takes place between God and man.

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<sup>1</sup> Cf. Z. Zdybicka, *Problem tak zwanej śmierci Boga*, in: *Aby poznać Boga i człowieka. Część pierwsza – o Bogu dziś*, ed. B. Bejze, Warszawa 1974, p. 150.

<sup>2</sup> Cf. J. Metz, *Teologia wobec cierpienia*, transl. J. Zychowicz, Kraków 2008, p. 111.

<sup>3</sup> Cf. J. Życiński, *Bóg postmodernistów*, Lublin 2001, p. 58.

<sup>4</sup> H. Balthasar, *Teodramatyka*, t. 1, *Prolegomena*, transl. M. Mijalska, M. Rodkiewicz, W. Szymona, Kraków 2005, p. 20.

For, although all the great religions believe that God speaks to man, it prevails, at the same time, that he never reveals to man the meaning of all mysteries. The role of man is, therefore, to listen attentively to the voice of God, to take the risk of faith, and to trust in His existence. The price for losing faith in the existence of God is to accept the meaninglessness of existence, one's own and that of the world. All attempts to soothe existential anxiety by means of entertainment or work are completely futile. For there is no other remedy than God.<sup>5</sup>

This article aims to address the issue of the anthropological roots of the negation or affirmation of God and religion. The truth about religion is inextricably linked to the truth about man, and the issue of perceiving man in terms of a religious being is one of the essential issues of philosophical anthropology.

## 2. Anthropological determinants of religion

As part of the theoretical analysis of explaining the fact of religion, philosophy clearly uses the conceptual apparatus of philosophical anthropology, and the question of the status of religion in a given philosophy is directly related to accepted anthropology. It is impossible to explain the fact of religion without recognizing the ontic status of human beings. This connection between anthropology and religion appears even in atheistic systems, although, in this case, the discourse takes on a caricatural expression. It is worth recalling the Polish representative of Marxist philosophy, B. Suchodolski, who states with satisfaction that, the philosophy of God is in fact a disguised form of the philosophy of man. At the same time, Suchodolski states that this thesis had been timidly proclaimed for a long time, although it is only Feuerbach who dared to fully reduce theology to anthropology.<sup>6</sup> Ignoring the ideological nature of the above formulations, it should be noted that when approaching the description of the phenomenon of religion, a person always experiences a feeling of intimidation, and even fear. After all, this field concerns the greatest mysteries of human life to be solved. The dispute between the thesis that religious needs are rooted in human nature and regarding it as a circumstance related to upbringing, tradition, a sense of loneliness or existential fear, will probably never end. *Homo*

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<sup>5</sup> Cf. L. Kołakowski, *Jeśli Boga nie ma... O Bogu, Diable, Grzechu i innych zmartwieniach tak zwanej filozofii religii*, transl. by T. Baszniak, M. Panufnik, Cracow 1988, p. 167.

<sup>6</sup> B. Suchodolski, *Narodziny nowożytnej filozofii człowieka*, Warszawa 1963, p. 7.

*religiosus*, as an anthropological category, will probably remain an unresolved problem, while the terms such as, for example, *homo sapiens*, *homo socialis*, *homo aestheticus*, or *homo oeconomicus*, are already regarded as indisputable definitions of the human being.<sup>7</sup>

The relation to God is not given to us by nature, and God is for me only to the extent that I myself genuinely exist.<sup>8</sup> This is because today, we are witnessing a clash in thought, and in life, of two basic types of visions of man, and simultaneously of two different concepts of humanism. Two types of humanism are fighting for so-called human happiness: atheistic humanism, according to which man is a completely autonomous being whose development is carried out through the activation of horizontal relations, and theistic humanism, which, recognizing the human person as the highest value in the sphere of derived beings, points to the timeless perspectives of human life and extends the existence of infinite dimension, which is a consequence of the ontic, mental and moral relationship of the human person with the transcendent “You”. However, this extraordinary value of man, confirmed by his stunning effectiveness in creating civilization progress, stands in striking contradiction to the work of destruction, for which he himself is also responsible.<sup>9</sup> This contradiction, moreover, causes an increasing alienation of man, who perceives with increasing horror that his condition does not give him a chance for salvation, although he needs and desires salvation. After all, it is a universal human experience to feel a state of existential insufficiency and existential incompleteness. The experience of this fragility and existential contingency relates to the need for man to transcend these limitations, to the striving to achieve fixation in being, to grasp some good that would give value and meaning to his existence.

### 3. Reductive vision of man and religion

While the philosophical image of man developed in ancient and medieval times clearly emphasized the spiritual side of the human being, which indicated his existential priority among earthly beings, the image of man created by the modern era has been deprived of this dimension. A large part of today’s dominant

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<sup>7</sup> Z. Zdybicka, *Człowiek i religia*, Lublin 1978, p. 16.

<sup>8</sup> K. Jaspers, *Wprowadzenie do filozofii*, Wrocław 2000, p. 44.

<sup>9</sup> W. Stróżewski, *W kręgu wartości*, Kraków 1992, p. 35.



anthropologies reluctantly perceive man as a material and spiritual being at the same time, natural and culture-creating, finite but desiring infinity, leaning towards the future, but strongly immersed in the past. This type of integral way of thinking about man is superseded and replaced by materialisms of various origins, which try to explain the phenomenon of human life within the same premises, as in the case of other living beings: matter, energy, natural selection, chance and necessity.<sup>10</sup>

Even a superficial observation of the reality at the beginning of the 21st century leads to the sad conclusion that modern man is often treated primarily in terms of an empirical being, and in his self-definition, he is satisfied with the results of research subjected to the rules of the exact sciences.<sup>11</sup> And yet, the search for understanding the world and man is not only about analyzing such problems that can be explained by the empirical sciences.<sup>12</sup> Modern man, despite the common experience of contingency, forgets that human nature consists in a constant effort to cross the boundaries of the animal nature inherent in him.<sup>13</sup> As Roman Ingarden writes, for this reason, he collapses helplessly into his pure animality, which in fact constitutes his death.<sup>14</sup> The “project” that is man becomes incomprehensible, even absurd, when it is understood only as a project-in-the-world. What is more, although it opens itself to all other beings, none of them exhaust its potentiality.<sup>15</sup>

Unlike other living beings, the human subject is able to objectively relate to itself, which means that all “animal” features of human life take on another meaning and not just a biological one.<sup>16</sup> Therefore, looking for justification only in the world of matter, man often ceases to be the master and user of things.

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<sup>10</sup> Cf. S. Zięba, *Człowiek stał się człowiekiem*, in: *Teologiczna, filozoficzna i naukowa wizja człowieka*, ed. K. Moskal, Lublin 2018, p. 45.

<sup>11</sup> Cf. K. Wojtyła, *Osoba i czyn*, Lublin 1994, p. 95.

<sup>12</sup> M. Heller, *Nauka i teologia – niekoniecznie na jednej tylko planecie*, Copernicus Center, Kraków 2019, p. 73; Cf. D. Dawkins, H. Hitchens, *Cztery jeźdźcy apokalipsy. Jak zaczęła się ateistyczna rewolucja?*, Wydawnictwo CiS, Stare Groszki 2019, p. 53.

<sup>13</sup> M. Krąpiec, *Kim jest człowiek*, in: *Wprowadzenie do filozofii*, Lublin 1992, pp. 142–143.

<sup>14</sup> R. Ingarden, *Księżeczka o człowieku*, Kraków 1987, pp. 21–24.

<sup>15</sup> Cf. Ch. Taylor, *Źródła współczesnej tożsamości*, in: *Tożsamość w czasach zmiany. Rozmowy w Castel Gandolfo*, ed. K. Michalski, transl. A. Pawelec, Kraków 1995, pp. 9–21.

<sup>16</sup> K. Bochenek, C. Mordka, J. Stala, *If there is no Religion – L. Kołakowski's Defence of the Sacred. Part 1*, “The Person and the Challenges” Volume 12 (2022) Number 2, p. 10.

Instead, he measures his value only by possessing things, which is all the more puzzling as never before had so much been spoken with regards to his dignity.<sup>17</sup>

In the description of human existence presented by the leading currents of philosophy, such as Marxism, existentialism or scientism, there are disturbing shortcomings. As Victor Frankl very aptly notes, these systems, based on false humanism claiming that man has allegedly become “everything”, inevitably lead to nihilism, according to which man is basically nothing.<sup>18</sup>

#### 4. Anthropological consequences of the “death” of God

The conflict between the affirmation of God and the affirmation of man, between absolute humanism and religion, so clearly outlined in contemporary thought, is expressed in the antinomian juxtaposition of the being of God and the being of man, of what is material and temporal, and what is spiritual, of faith and reason, of God and human rights. The question is, however, whether man can live after the “death of God”? Does the elimination and negation of God and religion really free and enrich him? The consequence of the “death of God” is, unfortunately, the “death of man”. All cognitive, ontic and anthropological concepts that eliminate the doctrine of God as a Personal and Transcendent Being consistently led to the elimination of the doctrine of man as a person transcendent in relation to the world of nature and history, they negate the spirituality of man, and the possibility of his existence after biological death. Man cannot escape from God without running away from himself, without crossing himself out.

One has to ask: how do millions of people who consciously profess atheism live today? The human psyche hates emptiness in this sphere. By eliminating God and religious values, man creates for himself imitations of the highest values, which he then zealously serves and glorifies. In the place of metaphysical references, there is a sad, albeit omnipotent “eschatology” of consumption, of broadly understood consumption, and not a search for objective values or a transcendent God.<sup>19</sup> The things that once referred almost everyone to God, are now becom-

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<sup>17</sup> Cz. Bartnik, *Personalizm*, Lublin 1995, p. 380.

<sup>18</sup> V. Frankl, *Homo patiens*, Warszawa 1971, p. 92.

<sup>19</sup> Cf. A. Aldridge, *Rynek*, Warszawa 2006, p. 13; J. G. Ritzer, *Magiczny świat konsumpcji*, Warszawa 2004, p. 8.

ing symbols of a new “religion”, that is, of what can be purchased and owned. Modern and today, post-modern society is trying to replace religion with utopia, which is obviously not a transcendent ideal, but a goal conceived by technology and spawned by revolution, which is carried out by history (progress, rationality, science). Just as medieval society found its equilibrium in God and the Devil, ours is based on consumption and its simultaneous condemnation. However, while around the concept of the devil there could at least form heresies and magic sects, in the world of prosperity there is no place even for heresy.<sup>20</sup> Consumption has taken over the role of the devil, tempting and transforming, taking over all spheres of life and taking away the ability to make decisions. Its social dimension is actually a religious dimension.

Postmodern atheism is not about proving the non-existence of God. According to the proponents of the “death of God”, there is simply no place for God in the world. In such a space of human existence, where the complexes of modern Prometheans seem to come to life, unfortunately, we so often forget that there is nothing that we can steal from God.<sup>21</sup> Meanwhile, in the perspective of atheistic anthropology, “God” can actually mean only an enemy, and at best, a competitor of man, but the context in which one could talk about the God of the evangelical mission, the God of love and salvation, is not permitted here.

The position of Friedrich Nietzsche who considers the Christian system of morality promoting values such as justice, altruism, mercy, the primacy of spiritual goods, and asceticism as well as all other religious and moral ideals, to be completely false, can still be considered the most far-reaching system of man’s “defense” against a God who is hostile to him.<sup>22</sup> Therefore, in a truly just world, there is no place for God and man simultaneously. Only the demise of faith in God opens the possibility of full development for human creative potential, and man finally becomes the highest value. After the death of God, man no longer has to despise life and be its opponent.<sup>23</sup>

Nietzsche’s atheism which is based on vitalistically understood ethics advocating the Dionysian attitude, accepting the cult of life, dynamics, strength

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<sup>20</sup> Cf. J. Baudrillard, *Spółczesność konsumpcyjna. Jego mity i struktury*, Warszawa 2006, p. 275.

<sup>21</sup> Cf. J. Życkiński, *Medytacje sokratejskie*, Lublin 1991, p. 134.

<sup>22</sup> *Historia filozofii i etyki. Źródła i komentarze*, eds. W. Tyburski, A. Wachowiak, R. Wiśniewski, Toruń 1997, p. 468.

<sup>23</sup> F. Copleston, *Historia filozofii*, t. VII, Warszawa 1995, p. 405.

and freedom<sup>24</sup>, apart from numerous epistemological and natural justifications, also has a very important anthropological basis. This motif is particularly important even for the philosopher, who considered faith in God to be a kind of crime against human life, suggesting a permanent conflict of interests between God and man. Perceiving in God only a tyrant who threatens human freedom, he considered faith to be a betrayal of humanity, a condemnation of joy and happiness, freedom and love. No wonder then that the negation of Christianity and religion became, according to him, the *conditio sine qua non* of humanism, and faith in man was conditioned by abandoning faith in God.<sup>25</sup> “Enchanted” by the myth of Prometheus, Nietzsche tried to imitate him in freeing people from this slavery of faith. By attacking what is “extraterrestrial”, he calls for turning human energy towards earthly life, for overcoming the Christian tradition that points only to life after death.<sup>26</sup>

Nietzsche’s views resulted, among other things, from a complete ignorance of biblical anthropology. This anthropology seemed to him to break man, to completely deprive him of his freedom, to forbid the love of life, to cross out all natural values. Nietzsche was convinced that man was treated completely instrumentally by his Creator.<sup>27</sup> Therefore, the advent of the era of man, associated with the time of complete nihilism, means, above all, the final overthrow of the decadent, Christian civilization of Europe. At the same time, it paves the way for a new dawn, a re-evaluation of values, the emergence of a higher type of man. It is necessary to greet the most terrible of all guests who stands at the door: “Man is something that should be overcome (...) man is a bridge, not a goal (...) Superman is the essence of the earth. (...) a line stretched between the animal and the superman – a rope over the abyss.”<sup>28</sup>

For most people, crossing this Nietzschean line usually ends in disaster, but this does not seem to interest the German philosopher. Similarly, the reflection on the meaning of our lives, which is not very consoling for a human being,

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<sup>24</sup> S. Kowalczyk, *F. Nietzsche i jego proklamacja śmierci Boga*, “Zeszyty Naukowe KUL” R. XIII (1970) nr 3 (51), p. 28.

<sup>25</sup> S. Kowalczyk, *F. Nietzsche i jego proklamacja śmierci Boga*, pp. 31–32.

<sup>26</sup> R. Solomon, K. Higgins, *Krótką historia filozofia*, transl. N. Szczucka-Kubisz, Warszawa 1997, p. 273.

<sup>27</sup> S. Kowalczyk, *F. Nietzsche i jego proklamacja śmierci Boga*, “Zeszyty Naukowe KUL” R. XIII (1970) nr 3 (51), p. 34.

<sup>28</sup> F. Copleston, *Historia filozofii*, t. VII, Warszawa 1995, p. 415.

is circulated by the majority of existentialist philosophy, received both by masses of simple people and by intellectuals. Existential books emanate at least mild pessimism, and often simply terrifying sadness. Atheist existentialists, however, invariably maintain that humans can only emerge from the crisis they find themselves in as a result of the absurdity of life and the “death of God” by accepting that their earthly life is simply the only one they have and that religion greatly impoverishes it.<sup>29</sup> It is by developing their personal talents that they can finally make their lives truly valuable.

Man does not receive any signs from anywhere that would show him the way to proceed, so he himself must assign his actions and things proper value.<sup>30</sup> At the same time, existentialism diminishes the role of biological and sociological determinants, ascribing unrestricted freedom to man. Man is free, man is freedom, and being condemned to this freedom, he must take sole responsibility for his life. Man cannot transfer this freedom to anyone, not even God, because he is ontologically “sentenced to freedom”, he can only exist as a free being. His freedom, however, is completely devoid of foundation – after all, he cannot become a god-like being, and his “passionate” desire to achieve a being similar to God’s being is doomed to failure in advance. Therefore, man tries to escape from his anxiety, freedom and responsibility by providing his decisions with the appearance of objective justifications. This bad faith takes many forms, from the simple to the subtle. One of its manifestations is religion, which causes an individual, by giving up his freedom, to drop responsibility for the choices he makes.<sup>31</sup> In Sartre’s existentialism, in which numerous echoes of Dostoyevsky’s *The Possessed* and Nietzsche’s *Thus Spoke Zarathustra* resound, the negation of God takes place above all in the name of the existence of man understood as freedom.

Under the omnipotent and all-pervasive gaze of God, there is no question of the existence of a person. And hence the alternative: Him or me. God is the “Other” in an absolute way; man must fight for liberation. For if God exists, then “I” cannot be myself, I cannot be towards myself. The negation of the idea of God is therefore closely related to the description and understanding of human existence. Sartre systematically questioned theism, viewing it as a threat to human interests. Man, receiving a specific existential status from the

<sup>29</sup> S. Kowalczyk, *Podstawy światopoglądu chrześcijańskiego*, Wrocław 1986, p. 41.

<sup>30</sup> J. Galarewicz, *Na ścieżkach prawdy. Wprowadzenie do filozofii*, Kraków 1992, p. 521.

<sup>31</sup> *Filozofia współczesna*, ed. Z. Kuderowicz, t. I, Warszawa 1990, pp. 319–320.

Absolute, would be determined in his actions. Sartre, however, points out that it is essentially irrelevant whether God exists or not, meaning that even if God exists, man remains free, for he is free to resist God, just as Orestes resists Zeus in *The Flies*.<sup>32</sup> For when Zeus says that he created Orestes free so that he might serve him, Orestes replies that since he was created free, he no longer belongs to Zeus, since he has become independent and capable, if he will, of facing the god. In this sense, it makes no difference, says Sartre, whether God exists or is an invention of man.<sup>33</sup> However, it is hard not to pay attention to the fact that the dimension of existence described by Sartre excludes not so much the God of religion as God understood as a superman, whose reference to man consists in treating him as an object, as his own product. Meanwhile, it is hardly necessary to prove that in this dimension, there is no room at all for the religious idea of God, so Sartre leads us astray not by what he says but rather by what he does not say, above all by the implicit suggestion that nothing exists beyond what he describes to us.<sup>34</sup>

## 5. Man in the context of Transcendence

A man can very easily lose his proper place in the world that he shapes himself, and he conceals this confusion with the appearance of self-confidence, in contrast with the frequent sense of despair, sadness and absurdity.<sup>35</sup> For man often becomes a god to himself in a way disturbingly reminiscent of Satan's promise: "You will be as gods." It is, however, a "god" not reminiscent of its Original; a "god" centered on himself, concerned with his greatness and self-realization; a god who rules out love and thus strikes both at the "other" and at himself.

Christian philosophical anthropology, on the other hand, shows that man, thanks to his openness to transcendence, finds his ultimate justification in God, and the most dangerous alienation for him is an attempt to separate him from God. This God is the ultimate fulfillment of the individual's desires, and not, as atheistic philosophies believe, a sovereign striving to annihilate the human

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<sup>32</sup> F. Copleston, *Religia i filozofia*, transl. B. Stanosz, Warszawa 1978, pp. 74–75.

<sup>33</sup> F. Copleston, *Historia filozofii*, t. IX, Warszawa 1991, p. 354.

<sup>34</sup> A. Luijpen, *Fenomenologia egzystencjalna*, transl. B. Chwedeńczuk, Warszawa 1972, pp. 238–243.

<sup>35</sup> K. Wojtyła, *Osoba i czyn*, Lublin 1994, p. 70.

“I”<sup>36</sup> Atheistic philosophies of man forget that religion is not only a mental, social or cultural fact, but a reality built on an ontic fact, that is, on the actual existence of God with whom man feels connected – because he exists thanks to participation in God’s existence.<sup>37</sup>

Without religion, human life, writes Whitehead, would be but a flash of momentary joy, illuminating a sea of suffering and misery, a tiny episode of passing experience.<sup>38</sup> Religion opens up infinite perspectives for human creativity, culture and civilization, and above all for his inner transformation. The relationship between man and God by no means enslaves man, as the masters of contemporary atheism argue (Feurebach, Marx, Nietzsche, Freud, and Sartre), but frees his humanity (as claimed by such thinkers as Marcel, Levinas, Ricoeur, Wojtyła, Styczeń, Tischner); it radiates freedom and the promise of a reliable community. By saying “thy will be done”, man gains a share in God’s freedom.<sup>39</sup> Only in this climate of theocentric humanism, where God is his ultimate goal, can man find his fulfillment.

In the 20th century, we experienced how powerless and dangerous man is, when placed in God’s position. That is why philosophers and sociologists of culture talk more and more often about the “need for the sacred”, so that man could live like a man and for the culture created by people to be human culture. It emerges with increased clarity that even strong atheistic ideologies have not been able to eliminate religion from human life and human culture; they have not been able to “kill God”, because man still needs the experience of religion. This happens despite the fact that a modern man, full of spiritual fear of the emptiness of life, loneliness, senselessness, resulting from the lack of awareness of the purpose that would make sense not only of individual human actions, but also of his entire life, escapes into various utopias.

Philosophical anthropology can play a very important role in the search for truth about man<sup>40</sup>; anthropology liberated from metaphysical reluctance, one that brings man the truth about the meaning of his life, showing him the

<sup>36</sup> J. Smith, *Doświadczenie i Bóg*, transl. D. Petsch, Warszawa 1971, p. 24.

<sup>37</sup> Z. Zdybicka, *Religia i religioznawstwo*, Lublin 1988, p. 51.

<sup>38</sup> A.N. Whitehead, *Religia a nauka*, in: M. Heller, J. Życiński, *Drogi myślących*, Kraków 1983, p. 46.

<sup>39</sup> Cf. J. Tischner, *Polski młyn*, Kraków 1991, pp. 254–255; J. Galarewicz, *Człowiek jest wspólnotą. Podstawy antropologii filozoficznej Karola Wojtyły*, Kęty 2002, pp. 185–189.

<sup>40</sup> A. Gehlen, *W kręgu antropologii i psychologii społecznej*, transl. K. Krzemieniowa, Warszawa 2001, pp. 5–7.

right place in the hierarchy of beings. As Leszek Kołakowski notes, God is not indebted to anyone, He is not bound by any human rules regarding reciprocity, debts and claims. Therefore, libertine murmuring accusing God of not bending to the requirements of our human justice, of not giving up his sovereignty, is naïve.<sup>41</sup>

In this regard, it is worth referring to the opinion of Alfred North Whitehead, who a century ago pointed out that, without religion, human life would be only a flash of momentary joy, illuminating a sea of suffering and misery, it would only be a tiny episode of passing experience.<sup>42</sup> Kołakowski, in turn, describes *horror metaphysicus* – if nothing truly exists outside of the Absolute, the Absolute is nothing, and if nothing truly exists besides me, I myself am nothing (in the above sense).<sup>43</sup>

## 6. Conclusion

Postmodern societies, often rejecting institutional religions and related anthropologies and axiologies, are heading in a direction that is difficult to read unequivocally.<sup>44</sup> However, even if the influence of Churches on various spheres of political and social life is decreasing, this does not mean that religious beliefs as such have disappeared. There is a revival of religious feelings of considerable fervor among large numbers of people, for example in the form of Protestant movements referring to the Gospel in the United States and South America, or the revival of the Methodist movement in England.<sup>45</sup> Being in constant motion, religion, also in Polish society, takes various forms, adapting to the requirements of postmodernity. Secularization and desecularization are to some extent, stages in the dynamic process of the transformation of religion. Within the framework of liquid postmodernity, however, religiosity takes different forms

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<sup>41</sup> Cf. L. Kołakowski, *Bóg nam nic nie jest dłużny*, transl. I. Kania, Kraków 1994, pp. 54–55.

<sup>42</sup> Cf. A.N. Whitehead, *Religia a nauka*, in: *Drogi myślących*, eds. M. Heller, J. Życiński, Kraków 1983, p. 46.

<sup>43</sup> Cf. L. Kołakowski, *Horror metaphysicus*, transl. M. Panufnik, Res Publica, Warszawa 1990, p. 30.

<sup>44</sup> K. Bochenek, *Zjawisko laicyzacji w społeczeństwie ponowoczesnym*, “Wschodni Rocznik Humanistyczny” 1 (2019), pp. 77–87.

<sup>45</sup> Cf. J. Mariański, S. A. Wargacki, *Płynne sacrum w społeczeństwie ponowoczesnym*, “Uniwersyteckie czasopismo socjologiczne KUL” 17 (2016), pp. 14–21.



than in the past, when they were permanent and anchored in Church institutions. People today often seek the *sacred* on various, sometimes surprising paths.

Leaving aside the issue of evidence for the existence of God or an analysis of his essence, it should be pointed out that, after meeting God, the inconsistent existence of man may cease to be the life of a wanderer at the mercy of chance.<sup>46</sup> Even for people who do not see themselves in the category of God's beloved children on a daily basis, who do not believe in God very ardently, He is the one who provides answers to bothering questions. Without God, man feels lost, and his life seems to be meaningless. At this point, as P. McInerney aptly notes, it is enough to refer to atheistic existentialists who reject God and at the same time proclaim the absurdity of human life.<sup>47</sup>

John Paul II, in his anthropological analyses, goes in a similar direction, which the above-mentioned atheists would probably consider beautiful, but still futile, illusions. It is inconceivable that the search so deeply rooted in human nature should be aimless and meaningless. The very ability to seek the truth and ask questions leads to the recognition that man would not undertake the search for something about which he knows nothing and which he considers absolutely unattainable. Even if someone disagrees with the rather arbitrary conclusion of the Polish pope, it is obvious that man is looking for some form of the absolute that would be able to provide answers to his existential questions and give them meaning. He is looking for something deeper that could be the foundation of all beings, he is looking for the ultimate answer, the highest value, beyond which there are no further questions and no other points of reference. Various hypotheses, as the Pope tries to prove, may be fascinating, but they are far from satisfying. In fact, there comes a moment in every person's life when, whether they admit it or not, they feel the need to root their existence in a truth recognized as ultimate, which would give him an indisputable certainty.<sup>48</sup> From the perspective of people presenting deep faith, but also of many among those who stand far from the traditionally understood religiosity, religion remains an essential, if not the only factor of the sense of human existence. *Homo rationalis*, which in the area of faith intermingles with *homo religiosus*, has a chance to look at the meaning of his existence from a different perspective.

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<sup>46</sup> Cf. P. Cattaneo, *Dlaczego Bóg dopuszcza cierpienie?*, transl. E. Łukaszyk, Kraków 2008, pp. 6–10.

<sup>47</sup> Cf. P. McInerney, *Wstęp do filozofii*, transl. R. Matuszewski, Warszawa 1998, pp. 32–33.

<sup>48</sup> Cf. *Fides et Ratio* 27–29.

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## **Searching for Human Dignity: The Anthropological Dimension of Moral Teachings of Benedict XVI**

### **Abstract**

Shaping the Christian vision of moral life, Pope Benedict XVI referred to the anthropology centred around the Biblical vision of man. The first and fundamental thesis of the revealed anthropology is the truth about the dignity of a human person. Nevertheless, in today's world one can observe certain symptoms of the lack of respect for self-dignity and dignity of other people. Being aware of this fact, in his teachings, Benedict XVI pointed out the value of human dignity; he promoted it and presented a genuine vision of personal dignity. Man and his dignity was the first principle, “so to say heart and soul” of the moral teachings of Pope Benedict XVI.

### **Keywords**

teachings of Benedict XVI, anthropology, human, dignity, permissivism, morality, Church

## 1. Introduction

The fundamental value of human life is human dignity. It makes human life meaningful. However, in the contemporary world, one can observe a conspicuous lack of respect for the dignity of the human person, which is a manifestation of practical moral permissivism. It is this permissivism that, in various modes, leads to the destruction of modern man, who is a free creature and endowed with an inalienable dignity, a creature redeemed by Christ and summoned to eternal life.

In the face of the destructive influence of permissive tendencies and phenomena on man, it is necessary to rediscover and promote the complete truth about human dignity. Bearing this in mind, Pope Benedict XVI conveyed in his teachings, a clear message concerning the value and dignity of each and every human being. He defended this dignity and struggled to exhibit its real dimension. He repeatedly emphasised that there is an urgent need for recreating “the Christian tissue of human society”<sup>1</sup>, since, wherever God is disregarded as the ultimate good, “the human dignity is jeopardized.”<sup>2</sup> The Church, as Benedict implies, is committed to make her vision of humanity known to the whole world. In this vision, dignity has the essential meaning.

## 2. *Imago Dei* – the foundation of dignity and the factor of morality

The Church, in proclaiming Christ to the whole world, has, from the outset, exercised care about the appropriate understanding of human dignity and has emphasised this extraordinary human value. The writings and documents of the Church that have been promoted throughout the course of history have always referred, and still refer to, the subject of human dignity, confirming the special commitment of the Church for this value.<sup>3</sup>

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<sup>1</sup> Benedict XVI – J. Ratzinger, *Odkryć oblicze Boga*, Pol. trans. W. Sapalski, Wydawnictwo “M”, Kraków, 2006, p. 5.

<sup>2</sup> Benedict XVI – J. Ratzinger, *Odkryć oblicze Boga*, Pol. trans. W. Sapalski, Wydawnictwo “M”, Kraków, 2006, p. 5.

<sup>3</sup> Cf. L. J. Buller, *Godność osoby ludzkiej wymiarem podmiotowości człowieka w gospodarce*, “Annales. Etyka w Życiu Gospodarczym” 15 (2012), pp. 52–53.

In his teachings, the great theologian, Pope Benedict XVI, continued in this tradition and reflected upon the question of human dignity, elaborating new, significant features for this value which was so frequently undermined during his pontificate. According to his vision “the dignity of a human person and human rights constitute a central issue”<sup>4</sup> and its “transcendent nature cannot be disregarded nor omitted.”<sup>5</sup> Pope Benedict XVI often reminded that the source of the properly – understood and true dignity of man is found in God Himself and in the genuine relationship with Him, which should be sustained every day. Humanity can be saved from the destruction of personal dignity only if it is truly and deeply rooted in God.

Analysing the question of the dignity of man, it has to be noted that “humanity today is unfortunately experiencing great division and sharp conflicts which cast dark shadows on its future.”<sup>6</sup> It is still true that many people and nations follow blindly erroneous ideologies, believing that they will bring them happiness. Regrettably, they simultaneously lose the gift of dignity and true faith. Christians are obliged to help such people by presenting to them the right way. “That is why contemporary man, without delay, must be shown a way that will lead Him to the “discovery” of the real image of God who revealed Himself to us in Jesus Christ.”<sup>7</sup> Without doubt, for a Christian, “the desire for God is written in the human heart, because man is created by God and for God; and God never ceases to draw man to Himself. Only in God will he find the truth and happiness he never stops searching for.”<sup>8</sup> As a result, man can satisfy this desire only by knowing God and bringing his heart closer to Him.

However, it must be remembered that becoming familiar with the Creator is impossible if man concentrates solely on his human desires. Unfortunately in many communities this claim is rejected and seems to be unacceptable. Consequently, it happens quite often that it is man who occupies the place of God.

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<sup>4</sup> Benedict XVI, *Godność osoby i prawa człowieka to kwestia centralna. Przemówienie wygłoszone do uczestników sesji plenarnej Papieskiej Akademii Nauk Społecznych* (Vatican – 4 May 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 7–8, p. 54.

<sup>5</sup> Benedict XVI, *Wolność religijna drogą do pokoju. Orędzie na Światowy Dzień Pokoju 2011 roku* (Vatican – 1 January 2011), “L’Osservatore Romano” (Pol. ed.) 32 (2011), no. 1, p. 5.

<sup>6</sup> Benedict XVI, *Rodzina wspólnotą pokoju. Orędzie na Światowy Dzień Pokoju 2008 roku* (Vatican – 1 January 2008), “L’Osservatore Romano” (Pol. ed.) 29 (2008), no. 1, p. 27.

<sup>7</sup> Benedict XVI – J. Ratzinger, *Odkryć oblicze Boga...*, p. 5.

<sup>8</sup> *Katechizm Kościoła Katolickiego*, Wydawnictwo “Pallottinum”, Poznań 1994, nr 27.

In such circumstances, the foundation of human dignity is frequently forgotten, since self-centredness, excessive care about one's own welfare and the pursuit of pleasures take precedence over the true love which has its source in God.<sup>9</sup> It has to be noted that, in numerous cases, such behaviour, is a result of the rejection of the truth about man being created by God. In most cases, disregarding this truth leads man not only to the conviction that he is allowed to name Himself the master of his own life and lives of other people, but also to the idea that he is the rightful lord of people's fates.

The truth that God has brought man into existence is irrevocable and has been handed down in the Bible. There are two Biblical passages provided in the Book of Genesis which can serve as a confirmation of the truth about the creation of man. The central idea emerging from both of these passages is that the dignity of man is based upon the creation of man by God as a beloved and desired being.<sup>10</sup> Pondering upon this question, Pope Benedict XVI has observed that man occupies an exceptional place in the whole work of creation. He has grounded this thought firmly on the messages emanating directly from the Bible. He pointed out that man has been created in the image and in the likeness of God (Cf. Gen 1:26)<sup>11</sup>, therefore he is entitled to respect and dignity, which cannot be taken away from Him in any way. He rightly argues that all human beings amount to something much greater than simply a collection of genetic combinations which they received from their parents.<sup>12</sup> In fact, it means that man, endowed by God with reason and free will, "must, as Benedict XVI explains, live true humanity, true humanism; he must be educated, have a human formation, human virtues; he must develop his intelligence, his will, his sentiments, his affections; he must be a true man, a man according to the will of the Creator,

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<sup>9</sup> Cf. Benedict XVI, *Tajemnicze pragnienie Boga. Audycja* (Vatican – 7 November 2012), "L'Osservatore Romano" (Pol. ed.) 34 (2013), no. 1, pp. 37–39.

<sup>10</sup> Sobór Watykański II, *Konstytucja duszpasterska o Kościele w świecie współczesnym "Gaudium et spes"*, in: Sobór Watykański II, *Konstytucje. Dekrety. Deklaracje*, Poznań 2008, Wydawnictwo "Pallottinum", no. 12.

<sup>11</sup> Cf. Benedict XVI, *Elementarz Josepha Ratzingera – Benedykta XVI dla pobożnych, zbuntowanych i szukających prawdy*, ed. M. Zawada, Wydawnictwo Literackie, Kraków 2008, p. 18; Cf. also: A. Proniewski, *Benedykta XVI perspektywa dialogu miłości Stwórcy ze stworzeniem*, "Studia Teologii Dogmatycznej" 7 (2021), p. 148.

<sup>12</sup> Cf. Benedict XVI, *Człowiek to coś więcej niż kombinacja informacji genetycznych. Przemówienie wygłoszone do uczestników XV Zgromadzenia Zwyczajnego Papieskiej Akademii «Pro Vita»* (Vatican – 21 February 2009), "L'Osservatore Romano" (Pol. ed.) 30 (2009), no. 4, pp. 31–32.



of the Redeemer.”<sup>13</sup> Accepting the truth that man is a being created by God in His image and in His likeness (Cf. Gen 1:27), man can be certain that he is strongly linked with his Creator. Regardless of the corner of the world he lives in, if “God is denied, human dignity also disappears.”<sup>14</sup>

Following the teachings of Benedict XVI and taking into consideration the above mentioned description of the act of creation, it may be noticed that the fact that humankind has been descended from the same first parents (Cf. Gen 3:20), constitutes the confirmation of the idea that all people are equally entitled to the fundamental human rights.<sup>15</sup> It has been explicitly stated by the Pope in the apostolic exhortation *Verbum Domini*: “I would like also to call the attention of everyone to the importance of defending and promoting the human rights of every person, based on the natural law written on the human heart, which, as such, are ‘universal, inviolable and inalienable’. The Church expresses the hope that by the recognition of these rights human dignity will be more effectively acknowledged and universally promoted, inasmuch as it is a distinctive mark imprinted by the Creator on his creatures.”<sup>16</sup> It is worth noticing that no man should restrict his neighbour’s rights to which the latter is unquestionably entitled, let alone taking his own life under the allegation of old age, physical suffering or dysfunction of some organs that may be diagnosed on an unborn child.<sup>17</sup>

The Church is constantly inviting every person to strengthen his or her bonds with Christ, since it constitutes the starting point for the development of the dignity of God’s children in their consciousness. Thanks to this relationship, man is even more obliged to take care not only of his own dignity, but also the dignity of his neighbours. Pope Benedict XVI has emphasised that such acts

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<sup>13</sup> Benedict XVI, *Uczmy się przeżywać z Chrystusem cierpienia życia duszpasterskiego. “Lectio divina” dla duchowieństwa diecezji rzymskiej* (Vatican – 18 February 2010), “L’Osservatore Romano” (Pol. ed.) 31 (2010), no. 5, p. 25.

<sup>14</sup> Benedict XVI, *Ten, kto broni Boga, broni człowieka. Przemówienie wygłoszone do Kolegium Kardynalskiego, Kurii Rzymskiej i Gubernatoratu* (Vatican – 21 December 2012), “L’Osservatore Romano” (Pol. ed.) 34 (2013), no. 2, p. 28.

<sup>15</sup> Cf. D. Cieślak, *Nienaruszalność życia ludzkiego w nauczaniu Benedykta XVI*, “Studia Teologiczno-Historyczne Śląska Opolskiego” 35 (2015), p. 210; Cf. also: F. J. Mazurek, *Godność osoby ludzkiej podstawą praw człowieka*, Wydawnictwo Katolickiego Uniwersytetu Lubelskiego, Lublin 2001.

<sup>16</sup> Benedict XVI, *Adhortacja apostolska “Verbum Domini”*, Wydawnictwo “M”, Kraków 2010, no. 101.

<sup>17</sup> Cf. Francis, *Między godnością i transcendencją. Przemówienie w Parlamencie Europejskim* (Strasbourg – 25 November 2014), “L’Osservatore Romano” (Pol. ed.) 35 (2014), no. 12, p. 10.

of gratuitous charity help us to overcome temptations “teaching us to respond to our neighbour’s needs and to share with others whatever we possess through divine goodness.”<sup>18</sup> Impoverishment thwarts the appropriate development of man to which he was summoned by the Creator. What is more, in societies stricken by poverty, there is a lack of esteem towards neighbours, which frequently manifests itself in violence that is ensued by dramatic social inequalities. Benedict XVI has noticed that “this is a problem which the conscience of humanity cannot ignore, since the conditions in which a great number of people are living are an insult to their innate dignity and as a result are a threat to the authentic and harmonious progress of the world community.”<sup>19</sup> Furthermore, every form of poverty, especially, that which is imposed, is incompatible with respect and the transcendent dignity of man.

Nowadays, thanks to social media and news websites, it is easier than ever before for contemporary man to gain access to the information about injustices that other people experience in different corners of the world. However, a lot of people observe this in all conscience and remain indifferent in situations when human dignity is destroyed and when injustice is spreading. Unfortunately many human hearts remain closed in the face of humiliation of the people living next to them. Pope Benedict XVI has drawn attention to this fact, emphasising that: “while the poor of the world continue knocking on the doors of the rich, the world of affluence runs the risk of no longer hearing those knocks, on account of a conscience that can no longer distinguish what is human.”<sup>20</sup> Such an attitude is neither an expression of Christian love, nor attention to the dignity of a human person, which should both be learned from Jesus Christ. Benedict argues that the promotion of human dignity is expressed in everyday reception of God’s love and in showing charity to others.<sup>21</sup> Meanwhile this charity should be “understood not merely as generic benevolence but as self-giving, even to the

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<sup>18</sup> Benedict XVI, *Chrystus dla was stał się ubogim. Orędzie na Wielki Post 2008 roku* (Vatican – 30 October 2007), “L’Osservatore Romano” (Pol. ed.) 29 (2008), no. 2, p. 4.

<sup>19</sup> Benedict XVI, *Zwalczanie ubóstwa drogą do pokoju. Orędzie na Światowy Dzień Pokoju 2009 roku* (Vatican – 1 January 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no 1, p. 3.

<sup>20</sup> Benedict XVI, *Encyklika “Caritas in veritate”*, Wydawnictwo “Biblos”, Tarnów 2009, no. 75.

<sup>21</sup> Cf. Benedict XVI, «Caritas» wyraża troskę Kościoła o potrzebujących. Przemówienie wygłoszone do uczestników 19. Zgromadzenia Ogólnego «Caritas Internationalis» (Vatican – 27 May 2011), “L’Osservatore Romano” (Pol. ed.) 32 (2011), no. 7, pp. 37–39.

sacrifice of one's life for others in imitation of the example of Jesus Christ."<sup>22</sup> It is necessary to encourage governments to provide for such regulations which will be conducive to reaching out to those who live in inequity.<sup>23</sup> Justice, being a moral virtue, and charity are the features which are inestimable in the process of promoting human dignity.

### 3. The mission of the Church in the face of the permissive phenomena menacing the dignity of man

It is worth mentioning that in the attitudes presented above, which express care about the dignity of man, there is an evident mission of the Church, which is constantly supported by the Holy Spirit, in order that everyone is able to experience joyful truth about God's mercy, which should be manifested in actions.<sup>24</sup> The Church is obliged to bring to realization the teachings of the Son of God. As Benedict XVI teaches, apart from proclaiming and giving testimony her task is to constantly manifest that "the Church prolongs Christ's saving mission in time and space: She wishes to reach out to every human being, moved by a concern that every individual come to know that "nothing can separate us from the love of Christ (Conf. Rom 8:35)."<sup>25</sup> Through such activity, the Church pours into human hearts hope and confidence that no matter what circumstances man finds Himself in, he is loved and accepted by his Creator. Besides, the Church, prolonging the salvific mission of Christ, is obliged to look after the dignity of each and every man; she is also to demand that people behave in such a way that helps to accentuate this great God's gift which was offered to man.<sup>26</sup>

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<sup>22</sup> Cf. J. Ratzinger – Benedict XVI, *Na początku Bóg stworzył... Cztery kazania o stworzeniu i upadku. Konsekwencje wiary w stworzenie*, Pol. trans. J. Merecki, Kraków 2006, pp. 49–57.

<sup>23</sup> Cf. Benedykt XVI, *Encyklika "Deus caritas est"*, Wydawnictwo Księży Sercanów, Kraków 2006, nr 26.

<sup>24</sup> Cf. Benedict XVI, *Bogactwo miłosierdzia i dobroci Boga. Rozważanie wygłoszone przed modlitwą "Regina caeli"* (Vatican – 11 April 2010), "L'Osservatore Romano" (Pol. ed.) 31 (2010), no. 6, p. 48.

<sup>25</sup> Benedict XVI, «*Caritas*» wyraża troskę Kościoła o potrzebujących..., p. 38.

<sup>26</sup> Cf. Benedict XVI, *Pozytywny rozwój społeczny powinien przywrócić godność człowiekowi i jego pracy. Homilia wygłoszona na zakończenie XXV Krajowego Kongresu* (Ankona – 11 September 2011), "L'Osservatore Romano" (Pol. ed.) 32 (2011), no. 10–11, pp. 31–33.

In the 21st century, when it may appear that the humanity lives in a state of a great welfare and prosperity, there is even greater need to spread and give constant testimony of love which people receive from God, and which is manifested among other things, by the dignity given to them by the Creator.<sup>27</sup> Pope Benedict XVI made his appeal to Catholics many times, and, during the World Youth Days in Madrid, he called especially upon young people to stand up for the sensitivity to human suffering. Moreover, the Pope exhorted not to ignore human suffering, which sometimes constitutes a great cross and may occur all over the world in the form of war, exclusion, addiction to drugs, fratricidal struggles, impoverishment or social exploitation. God expects that man, in the face of such situations, will share with his neighbour all the best he has, namely the ability to love and sympathize.<sup>28</sup>

It should be emphasised that every man has received from God freedom and right to life in unity with Him. However, nowadays there are a lot of communities which cannot freely profess their faith. Pope Benedict XVI educates that wherever spiritual development is restricted, there always occurs the violation of the fundamental human dignity to which every human is entitled. As a result, a person has no access to the truth and goodness, which are deeply rooted in every man from the very beginning, and correspondingly, the possibility of one's own development is hindered or prevented.<sup>29</sup>

Another great gift that man received is the opportunity to benefit from the world that God created. Many things that were created are indispensable for man's existence and survival.<sup>30</sup> On the other hand, there are many gifts which, if misused, may result in a broken bond with the Creator. To use the gifts judiciously, man is required to maintain good relations with God.<sup>31</sup> Nevertheless,

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<sup>27</sup> Cf. Benedict XVI, *List na rozpoczęcie Roku Kapłańskiego z okazji 150. rocznicy «dies natalis» świętego proboszcza z Ars* (Vatican – 16 June 2009), "L'Osservatore Romano" (Pol. ed.) 30 (2009), no. 7–8, pp. 3–8.

<sup>28</sup> Cf. Benedict XVI, *Nie przechodźcie obojętnie wobec cierpienia. Przemówienie wygłoszone na zakończenie Drogi Krzyżowej na Plaza de Cibeles* (Madrid – 19 August 2011), "L'Osservatore Romano" (Pol. ed.) 32 (2011), no. 10–11, pp. 15–16.

<sup>29</sup> Cf. Benedict XVI, *Wolność religijna drogą do pokoju...*, pp. 4–11.

<sup>30</sup> Cf. Benedict XVI, *Świat nie jest czymś, co się posiada, by rabować i wykorzystywać. Audiencja generalna* (Vatican – 6 February 2013), "L'Osservatore Romano" (Pol. ed.) 34 (2013), no. 3–4, pp. 44–45.

<sup>31</sup> Cf. J. Ratzinger, *Wprowadzenie w chrześcijaństwo*, Pol. trans. Z. Włodkova, Społeczny Instytut Wydawniczy "Znak", Kraków 2006, p. 190.

people should remember that “where God is denied and people live as though he did not exist, or his commandments are not taken into account, the dignity of the human person and the inviolability of human life also end up being rejected or compromised.”<sup>32</sup>

Benedict XVI has noted that the progress which has occurred in science does not always contribute to the development of man and to the heightening of his awareness of the worth, which is connected with the fact of his existence. This progress in the fields of science and technology has also generated certain doubts, which man living in the 21st century, has to challenge as never before. This doubt is connected with the fundamental question concerning human existence, namely whether one man is just a product of another man’s work, or whether his life may have some significance and dependent upon God. The Pope has also noticed that man has to make the ultimate decision of either-or.<sup>33</sup> This crucial decision has influence on the attitude of man towards the value of his own life, but most of all towards lives of other people. The rejection of the fact that human life depends on God, is equal to the renunciation of the truth that, “the dignity of a person must be recognized in every human being from conception to natural death.”<sup>34</sup>

Currently there is a need for families who are prepared to give testimony with their life, and confirm that the child whom they received from God is the evidence of His love. Furthermore, it is necessary to appreciate and take the utmost care of the families who have decided to accept the child, who while in mother’s womb, did not undergo a healthy development process. What is more, there is also an urgent need to disseminate the information about the heroic efforts of the women who were perfectly aware of the fact that their pregnancy had been diagnosed as complicated and dangerous, but despite all that, they decided to stand up bravely for new life and accept the child, regardless of numerous uncertainties. Those who received the great gift of faith should do their best to aid families and women expecting a child and undertake initiatives aimed at supporting women.<sup>35</sup>

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<sup>32</sup> John Paul II, *Encyklika “Evangelium vitae”*, Wydawnictwo “M”, Kraków 1995, no. 96.

<sup>33</sup> Cf. Benedict XVI, *Encyklika “Caritas in veritate”*, Wydawnictwo “Biblos”, Tarnów 2009, no. 75.

<sup>34</sup> Kongregacja Nauki Wiary, *Instrukcja dotycząca niektórych problemów bioetycznych “Dignitas personae”*, Wydawnictwo “Biblos”, Rzym 2008, no. 1.

<sup>35</sup> Cf. Benedict XVI, *Aborcja nie rozwiązuje problemów społecznych. Przemówienie wygłoszone do włoskiego Ruchu Obrony* (Vatican – 12 May 2008), “L’Osservatore Romano” (Pol. ed.) 29 (2008), no. 6, pp. 41–42.

It is worth noticing that defending the institution of family, which is based upon the marriage of a woman and a man, is conducive towards accepting new life and ensuring decent conditions for living. Pope Benedict XVI relentlessly strived for assistance to families.<sup>36</sup> In one of his speeches, he rightly argues that “the family occupies a fundamental role in a person’s upbringing. It is a true school of humanity and perennial values.”<sup>37</sup> In the light of the evident relationship between the dignity of a person and appropriately understood family values, the Pope advocates the necessity of shaping a family-oriented politics and culture.<sup>38</sup>

Today, it is necessary for every family to learn to shy away from the ideologies of the modern world, which try to deprive the conceived child of its dignity, and by the same token, to narrow it down to a role of a mere burden. In the 21st century, it is necessary more than ever, for families to influence society by giving testimony of the dignity of family life and the dignity of life of its every member. Furthermore, they should teach the modern world about the Gospel of life, through careful upbringing of children, which is manifested in constructive words, appropriate example, and the attitude of affection towards this member of the family, who is the smallest and the most defenceless, and who waits for the gift of love.<sup>39</sup> Such attitudes result in a properly-shaped society and strengthen and inspire people to reflect upon the dignity of the family and every child, even the one who is the most vulnerable.

Addressing the question of the dignity of man and its worth in the modern world, it should be emphasised that the issue of euthanasia, which is always a departure from and degradation of human dignity, must never be ignored. For a person of faith, suffering carries an extraordinary meaning, which has its exceptional source in the Passion and Death of Jesus Christ.<sup>40</sup> 21st century

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<sup>36</sup> Cf. Benedict XVI, *Wychowanie młodzieży do sprawiedliwości i pokoju. Orędzie na 45 Światowy Dzień Pokoju 2012* (Vatican – 8 December 2011), “L’Osservatore Romano” (Pol. ed.) 33 (2012), no. 2, pp. 4–5.

<sup>37</sup> Benedict XVI, *Rodzina szkołą wartości ludzkich i chrześcijańskich. Przesłanie do uczestników spotkania rodzin w ramach VI Światowego Spotkania Rodzin w stolicy Meksyku* (Vatican – 18 January 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 3, p. 22.

<sup>38</sup> Cf. Benedict XVI, *Rodzina szkołą wartości ludzkich i chrześcijańskich. Przesłanie do uczestników spotkania rodzin w ramach VI Światowego Spotkania Rodzin w stolicy Meksyku* (Vatican – 18 January 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 3, pp. 23–24.

<sup>39</sup> Cf. John Paul II, *Encyklika “Evangelium vitae”*, Wydawnictwo “M”, Kraków 1995, no. 92.

<sup>40</sup> Cf. Benedict XVI, *Encyklika “Spe salvi”*, Wydawnictwo “Biblos”, Tarnów 2007, no. 37–39. Cf. also: Benedykt XVI, *Eutanazja jest fałszywą odpowiedzią na dramat cierpienia. Rozważanie*

man, witnessing a developed medical science, is inclined to recognise euthanasia as the best way to solve the problem of human suffering. Pope Benedict repeatedly stood against this trend explaining “that euthanasia is a false solution to the drama of suffering, a solution unworthy of man.”<sup>41</sup> Moreover, every man, especially those who crave for beauty and pleasure, but are very much afraid of suffering and accompanying hardship, cannot reject the truth that “human life is beautiful and should be lived to the full, even when it is weak and enveloped in the mystery of suffering.”<sup>42</sup> Man created in the likeness of God, is summoned to give testimony of love. Euthanasia constitutes the negation of the natural vocation of man to life.<sup>43</sup>

Another rapidly growing threat which strikes directly at the dignity of man and family is the so-called “gender ideology”. The proponents of this idea do not approach masculine and feminine gender as a natural fact resulting from the biological sex, but rather as a social role about which every man and woman can decide of their own volition. Such conviction leads to the questioning and contradicting of one’s own nature, and by the same token, to the idea that gender is not a gift, but a creation about which a person can decide. In such behaviour, Pope Benedict XVI recognises dangerous “aspiration to become independent from the creation and the Creator. Man wants to create Himself on his own and always dispose autonomously of everything that concerns Him. However, as a result he behaves against the truth and against the Creator Spirit.”<sup>44</sup> In such a model of society, in which a person who is still developing their personality decides on their gender, the question of human sexuality is not understood as God’s gift. Such ideology is erroneous and it leads to the wrong perspective on anthropology and to negation of the fact that human being is created by God as a man and a woman. Anthropological revolution destroys humanity and its dignity.

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wyłoszone przed modlitwą “Anioł Pański” (Vatican – 1 February 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 4, p. 43.

<sup>41</sup> Benedykt XVI, *Eutanazja jest fałszywą odpowiedzią na dramat cierpienia. Rozważanie wyłoszone przed modlitwą “Anioł Pański”* (Vatican – 1 February 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 4, p. 43.

<sup>42</sup> Benedict XVI, *Życie ma wielką wartość, nawet kiedy jego piękno przysłania tajemnica cierpienia. Orędzie na XVII Światowy Dzień Chorego 2009 roku* (Vatican – 2 February 2009), “L’Osservatore Romano” (Pol. ed.) 30 (2009), no. 3, p. 7.

<sup>43</sup> Cf. Benedict XVI, *Eutanazja jest fałszywą odpowiedzią...*, pp. 43–44.

<sup>44</sup> Benedict XVI, *Radość wiary*, Pol. trans. M. Romanowski, Edycja Świętego Pawła, Częstochowa 2012, pp. 77–78.

## 4. Conclusions

Adopting the Christian ethical Personalism, Pope Benedict XVI saw the real point of moral duty in the dignity of human person. In his teachings, he not only emphasised the value and the dignity of man, but he also defended his dignity and strived to convey the real dimension of human dignity. In his opinion, it is necessary to take a careful and critical look at the present social and cultural situation, and evaluate the new tendencies and challenges of the modern world, in the light of the central position of Christ and Christian anthropology, whose first and fundamental thesis is the truth about the dignity of a human person. Anthropology, stemming from the Bible, holds the key to the mystery of man and brings hope to the contemporary world.

Also today, bearing in mind the achievements of Christianity in culture throughout the course of history, it is necessary to present the evangelical approach – theoretical and practical – towards reality and man. In fact, at the beginning of The 21st century man possessing his unquestionable dignity has the opportunity to fathom the Mystery of Christ and to take part in the salvation that He offers, and escape from the permissive doubts and uncertainties. Learning about one's own dignity, the dignity of a Christian, may become a strong motivation to make constant effort to sanctify one's own life. Therefore, personal dignity is *the most precious possession of an individual*.<sup>45</sup> It has a significant influence on the appropriate shape of the moral life of man.

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<sup>45</sup> John Paul II, *Adhortacja apostolska “Christifideles laici”*, Wydawnictwo “Pallottinum”, Poznań 1989, no. 37.



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## **Education for Responsible Freedom in the Teaching of Karol Wojtyła – John Paul II**

### **Abstract**

The purpose of this article is an attempt to show, based on selected excerpts from the works of Karol Wojtyła – John Paul II, the specificity of education oriented towards discovering the truth about a man as a worthy, free and responsible being, in need of upbringing. The performed analyses make it possible to see in responsible freedom, the axiological category and the basic attributes of human existence in its relation to the essence of education, the mature humanity of a person and the present day. They indicate the unquestionable value of the message of Karol Wojtyła -John Paul II, in this regard.

### **Keywords**

responsible freedom, education, Karol Wojtyła – John Paul II

Education for responsible freedom is an extremely important issue which requires a multi-faceted approach. The very concept of education for responsible freedom is complex and, at the same time, a highly difficult process to describe and implement, especially in today's reality, which is full of contradictions. The concern of John Paul II was to give the world – and consequently all educators – a clear and unambiguous vision of the Church's position on that subject, considering the confusion of competing educational systems. Karol Wojtyła – John Paul II, appreciating the importance and significance of the integral upbringing of a man, addresses that issue in many of his statements, in many aspects, and does not narrow it down to one dimension or plane. Taking into account the personalistic aspect of looking at a man and his integral upbringing, he does not avoid the philosophical, axiological, normative, religious or socio-cultural approach. At the same time, he creates an attractive model and educational interpretation for the whole of Christian pedagogy. In its essence, that model has a universal character, not subordinated to any ideology or socio-political system.

The purpose of this article is to show, based upon selected excerpts from the works of Karol Wojtyła – John Paul II, the specificity of education oriented towards discovering the truth about a man as a worthy, free and responsible being, in need of upbringing. An attempt to answer the following questions will help in achieving the assumed goal:

1. How does K. Wojtyła – John Paul II define responsibility and what is its essence?
2. What was freedom for him and when did it deserve to be called responsible?
3. What are the basic dimensions of freedom and what is its connection with national renewal, state sovereignty and moral order?
4. When is freedom creative and builds our humanity?
5. What makes freedom contradict itself and what does its falsification lead to?

The theoretical exploration of education for responsible freedom requires philosophical, theological, ethical and pedagogical analyses. It is to be hoped that the performed analyses will make it possible to look at responsible freedom as an axiological category and the fundamental attribute of human existence in relation to the essence of education, mature humanity and modernity.

## 1. The essence of responsible freedom

Karol Wojtyła – John Paul II was a tireless and authentic defender of responsible freedom of man, understood, above all, as the difficult art of creating oneself and taking responsibility for what reality calls a person to do at any given moment on the scale of one's own humanity, Poland and the whole world. He advocated the statement: "I am free when I choose what is good and true". He taught that a person, due to being free, seeks the truth and by finding it, and living according to it, implements his or her own freedom. He believed however, that saying, "I am free", was not enough, but rather stating, "I am responsible". Already during his pastoral and academic ministry in Kraków, Karol Wojtyła taught and wrote about "Love and responsibility"; "man in the field of responsibility"; and "responsible parenthood."<sup>3</sup> He considered responsibility as something most closely related to a person's act, meaning that persons are responsible for their own acts, also in the case of a failure to act. He taught "that one is responsible for an act that should have been performed (a morally good act) and was not performed, as well as for a performed act that should not have been performed (a morally bad act)." He explained that it was the case because, "responsibility is linked not only to the performance of an act but also to the duty to perform it." However, he treated responsibility not only as a category of duty, but also "as an intrapersonal fact experienced in conjunction with conscience, which indicates a dynamic relationship to the truth and assumes the response of the will to the good, to values."

Yet he believed that the mere ability and willingness to respond to values was not enough. A person is responsible "for something", that is, for any value (good) that appears on their path and demands the performance of an act as a recognized and chosen good. That conviction is particularly noticeable in the social encyclicals of John Paul II, in which he stresses that a man is responsible for example, for the growth of authentic freedom<sup>4</sup>, the performed good and the committed bad deeds,<sup>5</sup> the observance of rights of people and

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<sup>1</sup> K. Wojtyła, *Miłość i odpowiedzialność*, Lublin 1960; 1982; 1986.

<sup>2</sup> K. Wojtyła, *Człowiek w polu odpowiedzialności*, Rzym 1991.

<sup>3</sup> K. Wojtyła, *Rodzicielstwo a "communio personarum"*, "Ateneum Kapłańskie" 84 (1975) no. 1, pp. 17–31; K. Wojtyła, *Odpowiedzialne rodzicielstwo*, Watykan, 17 07 1995.

<sup>4</sup> *Veritatis splendor*, no. 84.

<sup>5</sup> *Veritatis splendor*, no. 61.

nations,<sup>6</sup> the common good, the creation and promotion of decent working conditions<sup>7</sup>, capitalism with a “human face.”<sup>8</sup> A man is responsible for genuine development and progress in which all participate,<sup>9</sup> the natural environment,<sup>10</sup> the state and society<sup>11</sup> and various other areas of social life.<sup>12</sup> He taught and emphasised that a person was also responsible “for someone else”, i.e. for every “neighbour”, due to their participation in common humanity. That responsibility is expressed by, e.g., the preferential option for the poor,<sup>13</sup> protection and support of marriage and family by state institutions and law,<sup>14</sup> responsible fatherhood and motherhood, responsible parental work,<sup>15</sup> parental responsibility for the sexual education of children<sup>16</sup> and adequate preparation of the children for their future life roles.

In the context of what has already been presented, it is worth noting that the book *Love and Responsibility* gives one of the most beautiful definitions of responsibility, referring to the spirituality of St John of the Cross: “The feeling of responsibility for another person can sometimes be full of concern, but it is never distressing or painful. For it is not restriction or impoverishment of a man that comes to the fore, but enrichment and development of a man.”<sup>17</sup> Responsibility for others, regardless of their condition or position, was also a clear leit motif of the pontificate of John Paul II.

Bearing in mind the sense of responsibility, he taught that a person, being free from internal and external determinations, is responsible “for himself/herself”, that is, for the value born in that person, in a specific “self”, together with action. A person performing an act fulfils themselves in that act. In that context, self-determination appears as “the basis of responsibility for one’s own

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<sup>6</sup> *Sollicitudo rei socialis*, no. 36; *Centesimus annus*, no. 21.

<sup>7</sup> *Centesimus annus*, no. 48.

<sup>8</sup> *Centesimus annus*, no. 42–43.

<sup>9</sup> *Sollicitudo rei socialis*, no. 17; 4, no. 52.

<sup>10</sup> *Centesimus annus*, no. 37.

<sup>11</sup> *Sollicitudo rei socialis*, no. 46.

<sup>12</sup> *Centesimus annus*, no. 37.

<sup>13</sup> *Sollicitudo rei socialis*, no. 4; *Evangelium vitae*, no. 32.

<sup>14</sup> *Familiaris consortio*, no. 49.

<sup>15</sup> *Familiaris consortio*, no. 40.

<sup>16</sup> *Familiaris consortio*, no. 37.

<sup>17</sup> K. Wojtyła, *Miłość i odpowiedzialność*, Lublin 1986, p. 213.



moral value". The responsibility "for" appears most clearly as moral responsibility. It is everyone's responsibility for their own moral development.<sup>18</sup> That type of responsibility is synonymous with the duty of self-determination, self-mastery, self-possession and self-development, that is, self-education.<sup>19</sup>

In the teaching of Cardinal K. Wojtyła – John Paul II, there is another aspect of responsibility to be considered. Apart from the responsibility "for", which is the first one genetically and substantively, there is the responsibility "towards", which presupposes the responsibility "for". The author emphasizes that responsibility "towards someone" is possible due to the personal structure of responsibility towards one's own conscience. Conscience, in its guiding and judicial function, acquires a special authority that "makes it possible to think and speak of conscience as the voice of God". Responsibility "towards someone" is formed and expressed in relation to one's own subject. That "someone", towards whom a person feels responsible, is also that person's own "self". This is an elementary form of responsibility.<sup>20</sup> Responsibility "towards someone" appears and, at the same time, indicates the assignment of a man as a person to the whole world of persons, which "has its own interpersonal and social structure". Within that structure, the need for responsibility "before someone" is one of the bases for the emergence of authority, especially the so-called judicial authority. Within the boundaries of the religious structure, on the other hand, one must speak of responsibility before God. According to Cardinal Wojtyła, responsibility is the sense of truth and the sense of freedom. The experience of responsibility emerges from the recognition of truth. Moreover, the experience of responsibility is the subjective expression of objective responsibility, the recognition of what a man "should" do for others, themselves and God. Co-responsibility, which is based on individual responsibility for the common good, is related to duty. The object of that good may be, for example, the homeland, history, tradition, national culture, religion or education. The common good is the objective reason for joint action. In turn, the subjective reason for such action is the "consideration of the community". Thus, co-responsibility is developed for the sake of the community.

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<sup>18</sup> Cf. K. Wojtyła, *Problem teorii moralności*, in: B. Bejze (ed.), *W nurcie zagadnień posoborowych*, vol. 3, Warsaw 1969, pp. 217–250.

<sup>19</sup> K. Wojtyła, *Osoba i czyn*, Kraków 1985, pp. 213–214.

<sup>20</sup> Cf. K. Wojtyła, *Perspektywy człowieka – integralny rozwój a eschatologia*, "Colloquium Salutis" – Wrocławskie Studia Teologiczne 7(1975), pp. 133–145; K. Wojtyła, *Osoba i czyn*, pp. 213–214.

It turns out to be an inevitable consequence of the fact that a person lives and acts in a community of persons. According to Karol Wojtyła, the necessary condition for the existence of responsibility in the interpersonal and social dimension is a bond. It is not only a condition, but also a carrier and guarantor of responsibility for another person. The bond is built through love and in love, a particular expression of which can be found in a poetic drama *The Jeweler's Shop*.<sup>21</sup> Co-responsibility; however, is not collective responsibility in the sense of negating the individuality of a person as the performer of an act. Moreover, in that sense, collective responsibility is a negation of co-responsibility.<sup>22</sup>

Summing up that, out of necessity, incomplete analysis, one can agree with the definition of responsibility proposed by W. Starnawski, who, describing the pedagogy of John Paul II, identifies that notion with “a consequence of an obligation to perform and implement an act (causality); responsibility (the experience of responsibility) is associated with conscience and indicates the characteristic feature of the will – responding to values (“I should – I respond”); it is responsibility for value – for the realization of value in some entity; in a particular case, it is responsibility for one’s own moral value (responsibility for oneself); responsibility “for value” leads to responsibility “towards someone”: it is responsibility in conscience towards oneself, in the ultimate dimension – to God.”<sup>23</sup>

## 2. Responsibility vs. education

In this analysis; however, considering the undertaken subject matter, an attempt to show the correlation between responsibility and education cannot be missing. In Wojtyła’s teaching, responsibility means the subjective justification of education. The first subject of responsibility in the process of education is parents. Parental responsibility is natural and total; it concerns the integral development of a child. It is, so to speak, a paradigm of all responsibility, since the responsibility of other educators/teachers is contractual and draws its binding force from the contract that parents enter into while entrusting their children to others.

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<sup>21</sup> K. Wojtyła, *Przed sklepem jubilera*, in: K. Wojtyła, *Tutte opere letterarie*, Milano 2001, pp. 762–870.

<sup>22</sup> K. Wrońska, *Osoba i wychowanie. Wokół personalistycznej filozofii wychowania Karola Wojtyły*, Kraków 2000, pp. 94–97.

<sup>23</sup> W. Starnawski, *Pedagogia osoby Jana Pawła II. Interpretacja egzystencjalna*, Warszawa 2020, p. 177.

In the process of education, there is a double responsibility: that of the educator and that of the student/pupil. In that context, it can be stated that the goal of education is to develop in the student/pupil an attitude of responsibility. It is responsibility for one's own development through self-education. Education for responsibility should be conducive to forming an attitude of responsibility in the student/pupil, which is a character trait. Such an attitude is characterized by a sense of responsibility and openness to values, as well as readiness to voluntarily take up the responsibility imposed on people by recognized values, along with its fulfilment. D. von Hildebrand, as I wrote in one of my earlier publications,<sup>24</sup> notes that a responsible attitude makes a person's actions predictable, which enables cooperation between people and conditions social life in general. The opposite of a responsible person is a frivolous and reckless person, an unpredictable and untrustworthy one. In the light of the teaching of Wojtyła, it can be said that every human being, by virtue of having reason and free will, is responsible for himself/herself, for another human being and for the whole world. For being a mature man means being responsible. This follows from the fact that for Wojtyła a person was someone, not something. A man is a person by nature, and by nature, a man is entitled to the subjectivity proper to a person. With regard to responsibility as perceived by John Paul II, attention should be drawn to the two ways of understanding it. The first one is responsibility associated with choices made by a man in the light of freedom, and the second one is responsibility for another person, a group of people, a parish community, a diocese and the universal Church. According to Wojtyła, that second way of understanding responsibility is clearly connected with the first one, since every priest, before taking responsibility for the community of people allocated to him, must first make a personal choice, responsibly and in the light of freedom: either he wants to be a priest and pastor or not; either he is capable of undertaking that task or not; either he feels called to handle that task or not.<sup>25</sup>

Starting from that second aspect of taking responsibility for other people, Wojtyła affirmed with his life, the servile character of the priestly ministry. Throughout all the years of his life, he was aware that, while being a servant of servants, he was always responsible for the faithful entrusted to him at the same time. Therefore, he sought to reach out to all his "parishioners", for whom

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<sup>24</sup> Cf. A. Rynio, *Wychowanie do odpowiedzialności. Zarys teorii i praktyki pedagogiki integralnej*, Lublin 2019, p. 250.

<sup>25</sup> A. Rynio, *Wychowanie do odpowiedzialności*, p. 251.

he felt responsible before God. Some accused him of acting like an ordinary parish priest while being the Governor of Christ. In view of the fact that John Paul II indeed felt that he was “a parish priest whose parish is the whole world”, as he admitted, such an accusation must be considered unjustified.<sup>26</sup> It should be noted that it was out of the sense of responsibility that all the apostolic journeys of John Paul II, which were a defining feature of his pontificate, resulted. In retrospect, one gets the impression that such responsibility was not a burden for him. That “extension and enrichment with another person” gave him strength and gave meaning to his priestly life. The gift of considering responsibility as enrichment allowed him to carry out pastoral ministry with unprecedented quality.

### **3. Correlation between responsibility and freedom understood as a gift and task**

While responsibility was for John Paul II “the indispensable culmination of the fulfilment of freedom”, he understood freedom as the Catholic Church sees it, that is, as an integral part of human nature, the right of a man to a free choice, something to which a man has been called. In life, it is expressed according to one’s conscience. It is linked to truth and goodness. Moreover, it grows out of truth and is oriented towards the good. It is far from any type of formalism. Nor is it identical to the absence of any norms. It is not only a value for a person, but, similarly to dignity, it is an essential property and indelible attribute testifying to the subjectivity of a man: it is rooted in the interior of a person, it belongs to the nature of a human being and it is a man’s hallmark.<sup>27</sup> It is given to a man by God as a measure of their dignity. However, it is also expected of a man. Freedom indicates the qualitative difference of a person from other creatures, which are guided by laws of nature, instincts, etc.

However, not every human being has the ability to grasp the gift of freedom with reason. Freedom is a gift which most people find difficult to recognize and define in depth. Usually, people limit themselves to recognizing the gift of freedom in terms of wanting or not wanting something. Such a way of making choices, in the perspective of shallowly understood freedom, may lead to solutions contradictory to the *Decalogue* and conscience. People are often not

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<sup>26</sup> A. Rynio, *Wychowanie do odpowiedzialności*, p. 252.

<sup>27</sup> *World Day of Peace* 1981, no. 5.

aware of the mechanisms that determine all decisions. In his book *Memory and Identity*, John Paul II demonstrated that people were guided by different criteria every time they made a choice for freedom. Therefore, he tried to sensitize his listeners to the ethical participation of a category of good, which takes place in a human being at the moment a choice is made. Following St. Thomas, John Paul II presented the distinction of good into the decent, useful and pleasurable good. He created an awareness of different motivations guiding a man in the process of approaching the moment of making choice. It all depends on whether people, while making choices in the light of freedom, pursue a decent good, which does not assume personal gain, or whether they make choices presupposing the experience of pleasure or personal gain, not taking into account the decent good which serves the public.

Only responsible choice-making can be a source of human happiness. Reflecting upon the issue of responsibility while making choices, the Pope warned against primitive liberalism as an extreme manifestation of the orientation towards a pleasurable good, beneficial only to the person making the choice, without considering the good of other people and sometimes even against Christian love for another person. It is also difficult not to notice that such liberalism is not a path towards achieving the good even by the person choosing the so-called pleasurable good. John Paul II pointed out that the thought process of utilitarians, assuming the good pleasant for the greatest number of people, could easily obscure the value of a human being, within itself, without the need to achieve benefits. Therefore, referring to Immanuel Kant, he advocated responsible choice in terms of good – the disinterested good.

Moreover, responsibility should go hand in hand with awareness and knowledge. Few people, however, consider motivations while making choices. In that case, a lack of knowledge almost always has negative consequences. Therefore, care should be taken to recognize and respect the gift of freedom of persons. After all, cognition and discernment are burdened with responsibility for the known truth. Yet there is no freedom without responsibility and without love of truth. Hence, if people wish to be free, they must build their freedom on the foundation of objective truth, knowing how to consciously make use of everything that is true good. Following Christ, the Pope reiterated many times that the greatest fulfilment of freedom was love realized through devotion and service. He also often commented that the truly free persons were those who knew how to set limits for themselves and lived according to their conscience. He taught that freedom required generosity and readiness to make sacrifices. It required

vigilance and courage. At the same time, it was an extremely precious value for which one sometimes had to pay a high price.

For John Paul II, freedom was not just “some” kind of value, but an essential property and an indelible attribute testifying to the subjectivity of a person. In 1981, he wrote that freedom was rooted in the interior of a man, it belonged to human nature and is its hallmark. It was a structural ontological element of a man. Authentic freedom was “a special sign of the image of God in a man.”<sup>28</sup> The source of freedom, understood in such a way, was the transcendent dignity of a person.<sup>29</sup> He taught that freedom had individual and social dimensions. He called for its respect and responsibility while making use of it in social life. He pointed to its connection with national renewal, state sovereignty and moral order. For John Paul II, freedom was a value conducive to national renewal and true sovereignty of a state. This was particularly emphasized during the Jubilee Mass at Jasna Gora on 19 June 1983, during which he made the listeners aware that “a nation is truly free when it can shape itself as a community defined by the unity of culture, language, history. A state is truly sovereign when it governs society and serves the common good of the society at the same time, and when it allows the nation to realize its proper subjectivity and identity. The above entails creating the right conditions for development in terms of culture, economy and other areas of life of the social community, inter alia. The sovereignty of a state is deeply related to its ability to promote the freedom of the nation, that is, to create conditions to allow it to express its entire historical and cultural identity, i.e., to be sovereign through the state.”

He argued that freedom could be creative in social life as long as it was “contained within the framework of a legal system that requires from it service to integral human freedom” and was realized within the limits of the common good and public order.<sup>30</sup> For authentic freedom should build the social order.<sup>31</sup> In the context of contemporary controversies concerning the concept of freedom, he made clear distinctions between genuine freedom and its appearance. While valuing freedom in personal and social life, he mentioned the issue of the criteria of true freedom and its deepest meaning. On 5 October 1995, at the United Nations Headquarters in New York, he articulated that problem

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<sup>28</sup> *Veritatis splendor*, no. 37.

<sup>29</sup> *Fides et ratio*, no. 80.

<sup>30</sup> *Centesimus annus*, no. 42.

<sup>31</sup> *Centesimus annus*, no. 13.

very clearly during his speech, saying that “freedom is the measure of human dignity and greatness. Living in the conditions of freedom to which individuals and nations aspire is a great opportunity for the spiritual development of a man and the moral revival of nations.”

#### 4. Responsible use of freedom

John Paul II taught that the fundamental issue to be addressed was the responsible use of freedom, both in personal and social dimensions. Freedom is not simply the absence of tyrannical power and oppression, nor does it mean the freedom to do whatever one feels like. He taught that freedom had its inner “logic” that defined and ennobled it: “it is subordinated to truth and is realized in the search for truth. It is detached from the truth about a man; in individual life, freedom degenerates into arbitrariness, and in political life, into the violence of the stronger and the arrogance of power”. Treating freedom as a gift and a task, he pointed to its creative dimension in relation to oneself and others, the relationship between freedom and truth, goodness and responsible love, as well as to the exposure of freedom to self-denial. He emphasized that “freedom, disregarding the logic of the moral order, is exposed to self-denial, favouring the process of self-destruction of an individual and whole societies.”<sup>32</sup> For when “freedom denies itself, it tends towards self-destruction and destruction of the other person, when it ceases to recognize and respect the constitutive bond which binds it to the truth. Whenever freedom, wishing to free itself from any tradition and authority, closes itself even to the original and most self-evident certainties of objective and universally acknowledged truth, which constitute the basis of personal and social life, then a man no longer accepts the truth about good and evil as the sole and unquestionable point of reference for their decisions, but is guided solely by their subjective and changeable opinion or simply by their selfish interest and fantasy.”<sup>33</sup>

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<sup>32</sup> II M. Sztaba, *Jan Paweł o wolności jako darze i zadaniu w życiu społecznym*, <https://www.niedziela.pl/artukul/8200/Jan-Pawel-II-o-wolnosci-jako-darze-i> (29.05.2021).

<sup>33</sup> *Veritatis splendor*, no. 19.

## 5. Contemporary threats to education for responsible freedom in the dimension of individual and social life

Taking into account the contemporary context of the lack of education for responsible freedom manifested by the screaming crisis of education, subjectivity and the tragic consequences of thoughtless conduct on the part of young people and adults, as well as the lack of respect for the dignity of a person and the value of human life, or the fact of belonging to a family, culture and religion, one should ask about the main cause of the wild-scale escape from true freedom and educational responsibility characteristic of modern times.

In my opinion, that escape is the consequence of a disregard of the essence and importance of freedom, responsibility and education, and wasting time on meeting the challenges of modern social reality. By limiting the influence of school and family on the education of children and young people, with the use of sham reforms, an attempt is made to form a human being suitable for the times in which we live, without taking into account the consequences of neglecting education and blurring the boundaries of freedom and responsibility for others.

However, as rightly noted by Iłona Gołębiewska, “the greatest sin against the principles of responsible education of young generations is the ubiquitous moral permissiveness.”<sup>34</sup> It is an educational and social attitude in which freedom is treated on an equal footing with consent to any choice, there is unlimited tolerance towards the behaviour of others, and “freedom from” is the main motive for action. The quoted author notes that the basis for educational permissiveness is the desire to overcome the previous authoritarianism and rigourism in the education system, but the changes taking place currently have the opposite effect: the degradation of the role of school and family as educational institutions. Permissiveness understood in that way also affects teachers. More and more often, they do not set requirements, do not support students in their life choices, do not protest against the demanding attitude, fulfil whims, avoid taking the responsibility for the upbringing and education of the young people. However, fortunately, those tendencies are not universal, as a significant proportion of educators fulfil their responsibility for themselves and for their students. Yet, the increasing indifference to values related to the work of teachers and educators has negative consequences. One of them is the formation of a selfish

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<sup>34</sup> I. Gołębiewska, *Kryzys odpowiedzialności pedagoga*, “Wychowawca” 10 (2013), p. 16.



young person who, on the threshold of adult life, reveals narcissistic attitudes and is unable to take responsibility for himself/herself and for others.<sup>35</sup> A simple correlation can be noticed: a lack of responsibility of a teacher and educator translates into a lack of responsibility of a student.

At the root of those demoralizing attitudes, there is the interdependence of the crisis of education and responsibility with the crisis of the family and the school. To add to this, if the destructive influence of the media (which more and more often ridicule traditional moral norms and values, justify various forms of violence, destroy true authorities and promote hedonistic values relating to the most primitive human needs) is taken into account, it is no longer surprising that the greatest educational challenge is to sensitize students to values and a proper understanding of fundamental concepts such as truth, good, freedom, dignity, love, subjectivity, education or responsibility.

This was very well understood by St. John Paul II, who warned against the falsification of freedom. He showed his contemporaries the consequences of depriving freedom of responsibility in the dimension of individual and social life, which was aptly described by Fr. Mariusz Sztaba. In his opinion, "The external threat to freedom manifests itself in, e.g., limiting freedom of conscience and denomination, freedom of religion. An external threat to freedom is also the "culture" of moral relativism that falsifies the moral truth and blurs the boundary between the good and evil. It is also any kind of coercion and violence, both physical and psychological, in the form of manipulation of the truth and abuse or misuse of the word "freedom." Finally, intolerance and various forms of ideological discrimination in public life (for example, the so-called public opinion, fashion trends, etc.) also destroy authentic freedom."<sup>36</sup> In turn, the internal threats to freedom arise, in the Pope's view, from ignoring the inner order and logic of freedom. Due to the size limitation of this publication, I omit a detailed characterization of those threats, which take the form of primitive liberalism, a "creative concept of conscience", as well as a mystified authenticity consisting in axiological coherence and faithfulness only to oneself. In addition to this, the method of effective education for responsible freedom and recommendations for contemporary educators will be discussed in my next paper.

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<sup>35</sup> I. Gołębowska, *Kryzys odpowiedzialności pedagoga*, p. 16.

<sup>36</sup> M. Sztaba, *Jan Paweł o wolności jako darze i zadaniu w życiu społecznym*, <https://www.niedziela.pl/artykul/8200/Jan-Pawel-II-o-wolnosci-jako-darze-i> (29.05.2021).

Summing up the analyses performed for that article, it is worth noting that the Pope's message clearly shows that responsible freedom is given to us and expected of us, and since it has to be constantly acquired, it implies a gift and struggle.

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## **Competences of an RE Teacher/Catechist in the Opinion of Schoolchildren**

### **Abstract**

An important issue addressed in the presented article is the competencies of the RE teacher/ catechist. Two main problems are posed, summarized in the following questions: What competencies should a teacher of religion/catechist have? What qualities,

according to secondary school pupils, should have an RE teacher?

An attempt to answer such questions was made on the basis of an analysis of the literature on the subject and the results of a nationwide quantitative and qualitative study of secondary school pupils in Poland.

The basic concepts of competence are discussed, groups of competencies relevant to the profession of religion teacher are characterized. Also presented are the results of research on the opinions of secondary school pupils regarding the person of a religion teacher/catechist.

## Keywords

competencies, teacher, educator, religion teacher, catechist, empirical research

The effective implementation of RE lessons at school – at different stages of education – depends upon many factors. These include the goals to be achieved, the content of education, teaching-learning methods, didactic means, forms of student activity, etc. The importance of the person of the RE teacher/catechist in this regard must also not be forgotten. Polish pastoral theologian M. Majewski stressed the importance of the RE teacher/catechist because the realization of the principles of religious education depends on him/her to a large extent. Religious education in schools in Poland has been regarded for a long time as catechesis, so the theory of religious education in schools (state and private) has been strongly dependent on catechetical theory. RE teachers tended to use the words catechesis and religious education interchangeably. The current situation of catechesis at school, draws most clearly the role of the catechist as a teacher, formally and officially similar to others, but at the same time quite different in his specific salvific, ecclesiastical mission. For a long time now, the list of requirements for the catechist or RE teacher has been very long and ambitious. Here, it is necessary to take into account both his substantive and methodical preparation, as well as his educational and personality predispositions. The catechetical and educational literature dealing with the issue of describing the qualities a good catechist-teacher should have, is very extensive.<sup>1</sup> Among

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<sup>1</sup> K. Misiaszek, A. Potocki, *Katecheta i katecheza w polskiej szkole*, Warszawa 1995, Wydawnictwo Salezjańskie; M. Snieżyński, *Efektywność kształcenia*, Kraków 1992, Wydział Katechezy Kurii Metropolitalnej w Krakowie; A. Janowski, *Uczeń w teatrze życia szkolnego*, Warszawa 1995, WSiP; K. Misiaszek, *Wyzwania współczesności dla formacji katechetów*, “Ateneum Kapłańskie” (1994) 513/514, pp. 203–214; A. Potocki, *Spoleczna formacja katechetów*, “Ateneum Kapłańskie” (1994) 513/514, pp. 232–241; J. Szpet, D. Jackowiak, *Lekcja religii szkołą*

the most frequently mentioned positive qualities that define a religion teacher/catechist are knowledge of the pupils, thorough knowledge, ability to pass on the knowledge possessed, pedagogical tact, creative attitude, good memory and eloquence. However, for the implementation of religious education at school in Poland, the most important thing is the teacher's attitude towards the truths of faith, bearing witness with his/her life, and the implementation of the salvific and ecclesiastical mission.

The reflection undertaken on the competence of the religion teacher/catechist, in the opinion of schoolchildren, aims to give reliable answers to two fundamental questions: 1) what competences should a teacher of religion/catechist possess?; 2) what qualities, according to the youth, should a teacher of religion have? An attempt to answer such questions will be possible thanks to the analysis of literature on the subject and the results of nationwide empirical research of school youth.<sup>2</sup>

## 1. Competences of a religion teacher/catechist

The rapidly changing conditions of life and faith in the modern world place particular demands on catechists. Their scope encompasses the entire personality of the catechist. They require comprehensive preparation and formation to meet the tasks and needs of contemporary catechesis. The present, like every epoch, gives rise to the necessity of a deeper reading and shaping of the identity of the catechist against the background of the requirements posed by the extraordinary mission of the preacher himself and the specific demands of the recipients of the Good News.<sup>3</sup>

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*wiary*, Poznań 1996, Płocki Instytut Wydawniczy; C. Sondej, *Osobowość katechety i jej wpływ na życie katechizowanych*, in: M. Śnieżyński (ed.), *Katecheta w szkole*, Kraków 1994, NWK, pp. 7–24; E. Osewska, *Kobieta katechetka*, in: J. Stala (ed.), *Dzisiejszy katecheta*, Kraków 2002, WAM, pp. 191–204; E. Osewska, *Rodzina i szkoła wobec współczesnych wyzwań wychowawczych*, Kraków 2020, UPJPII; A. Offmański, *Katecheta permanentnie kształtujący się*, in: J. Stala (ed.), *Dzisiejszy katecheta*, Kraków 2002, WAM, pp. 171–190; S. Kulpaczyński, *Retrospektywny obraz katechety*, "Seminare" (1997) 13, pp. 51–57.

<sup>2</sup> Scientific work subsidized from the state budget under the program of the Ministry of Education and Science called "Science for Society" project number Nds/537097/2022/2022 grant amount 780 538 PLN, total project value 780 538 PLN.

<sup>3</sup> H. Słotwińska, *Aktualny i idealny obraz katechety*, "Katecheta" (1998) 9, p. 69.

Bearing in mind the wide range and multidirectional nature of the demands placed on religion teachers, the following will indicate the most important competences they should possess.

The term competence, used in pedagogical sciences, has its Latin root *competentia*, which means responsibility, conformity, and *competere*, i.e., to agree, to suit, to compete (with someone).<sup>4</sup> According to the Contemporary Dictionary of the Polish Language, competence is “the ability and readiness to perform; a learned skill to do things well, developed abilities necessary to cope with problems.”<sup>5</sup> Such a definition of competence is not always sufficient, especially in relation to teachers, including religious teachers-catechists. E. Goźlińska and F. Szlosek define competence as “professional preparation, range of knowledge, skills and responsibility to perform specific tasks (...)”<sup>6</sup>

According to H. Kwiatkowska – it is “the subject’s ability and readiness to perform tasks at an expected level.”<sup>7</sup> This expected level indicates certain characteristics of a competent person, which include: possessing specific knowledge, professionalism, expertise, being a specialist in a given field. W. Okoń points out that teacher competence is expressed in the ability to self-realisation, as well as the ability to undertake in specific areas of pedagogical activity.<sup>8</sup> On the other hand, S. Dylak defines teacher competence as “a set of knowledge and skills, dispositions, as well as attitudes and values necessary for the effective implementation of the imposed tasks.”<sup>9</sup> W. and J. Strykowski and J. Pielachowski identify competences with teachers’ qualifications and their skills necessary to perform the teaching profession.<sup>10</sup> In the context of the

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<sup>4</sup> A. Mączkowska, *Kompetencje*, in: T. Pilch (ed.), *Encyklopedia pedagogiczna XXI wieku* T. 2, Warszawa 2003, Wydawnictwo Akademickie “Żak”, p. 693.

<sup>5</sup> B. Dunaj (ed.), *Słownik współczesny języka polskiego*, T. 1, Warszawa 1998, Reader’s Digest Przegląd, p. 455.

<sup>6</sup> E. Goźlińska, F. Szlosek, *Podręczny słownik nauczyciela kształcenia zawodowego*, Radom 1997, Instytut Technologii Eksploatacji, p. 52.

<sup>7</sup> H. Kwiatkowska, *Pedeutologia*, Warszawa 2008, Wydawnictwa Akademickie i Profesjonalne, p. 35.

<sup>8</sup> W. Okoń, *Nowy słownik pedagogiczny*, Warszawa 2007, Wydawnictwo Akademickie “Żak”, pp. 186–187.

<sup>9</sup> S. Dylak, *Wizualizacja w kształceniu nauczycieli*, Poznań 1995, Wydawnictwo Naukowe UAM, p. 37.

<sup>10</sup> W. Strykowski, J. Strykowska, J. Pielachowski, *Kompetencje nauczyciela szkoły współczesnej*, Poznań 2003, Wyd. eMPi2, p. 22.

topic of this study, M. Czerepaniak-Walczak's definition is worth highlighting. According to the author, the notion of competence includes specific properties of a person, expressed in demonstrating – at the level set by social standards – the ability to behave adequately, being aware of the need and consequences of such behaviour, and accepting responsibility for it.<sup>11</sup>

There are many classifications of teacher competences. W. Strykowski divides them into three basic groups: content-related – concerning the content of the taught subject; didactic and methodological – concerning the teacher's workshop; educational – concerning various ways of influencing students.<sup>12</sup>

From the definitional approaches to the concept of competence quoted above, it can be seen that they are multiple. A religion teacher/catechist can acquire the above competences through professional training, self-education and self-improvement, during ongoing formation and acquisition of professional experience in pedagogical practice. Continuing education and the striving for self-improvement, the workshop of work, leads to the broadening of one's own competences.

As already noted above, there are many divisions and classifications of teaching competences. Due to the specific nature of the profession of religion teacher, it is worth noting the following:

- Substantive competence;
- Didactic-methodical competence;
- Implementing competence;
- Moral competence;
- Psychological/personal competence;
- Communicative competence;
- Social competence.

The first three groups of competence refer mainly to practical solutions during the organization and implementation of religion lessons at school by the teacher/catechist, the others to the person of the religion teacher himself. As J. Stala emphasises, "The formation of religion teachers and catechists should take

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<sup>11</sup> M. Czerepaniak-Walczak, *Między dostosowaniem a zmianą. Elementy emancypacyjnej teorii edukacji*, Szczecin 1995, Wydawnictwo Naukowe US, pp. 135–137.

<sup>12</sup> W. Strykowski, J. Strykowska, J. Pielachowski, *Kompetencje nauczyciela szkoły współczesnej*, p. 23.

into account and harmoniously combine the basic elements: to be, to know, to be able.”<sup>13</sup>

Substantive competence refers to the teacher’s possession of knowledge in the field of religious instruction. What is important here is a broad knowledge of the content covered in religion lessons. It is the religion teacher’s multifaceted and in-depth orientation to the topics which he or she takes up during lessons.<sup>14</sup>

Didactic-methodical competence refers to the implementation of the educational process. They include both methodological preparation for teaching (setting goals, selection of methods, forms, didactic means, etc.) and permanent improvement of the didactic and educational workshop.<sup>15</sup> As J. Stala<sup>16</sup> emphasises, “The contemporary religion teacher and catechist should be characterised by a creative attitude to methods and didactic means, as postulated by contemporary didactics, because he or she cannot limit himself or herself to teaching religion lessons only by the administration method.”

Implementation competence is related to the ability to apply didactic and pedagogical knowledge in educational practice.<sup>17</sup> It concerns the ability to develop didactic plans, scenarios for religious education lessons, to formulate operational goals and educational requirements, to design and construct tools for assessing pupils’ knowledge, to evaluate lessons, and to use diagnostic tools to effectively achieve the set goals of religious education adapted to pupils’ abilities and to support their integral development.<sup>18</sup>

In addition to *praxis*-related competences, personal competences are very important in the work of RE teacher. They are related to the personality traits of the religion teacher and his or her own identity. They also determine to what extent he or she has a psychological predisposition for the teaching profession and displays the essential creative abilities necessary for this profession.

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<sup>13</sup> J. Stala, *Umiejętność działania nauczyciela religii i katechety. Kierunki formacji kształtowania umiejętności pedagogiczno-katechetycznych*, “Rocznik Teologii Katolickiej” (2011), Tom X, p. 162.

<sup>14</sup> J. Szpet, *Kompetentny katecheta*, in: *Katecheza – Rodzina, Parafia i Szkoła*, 2003, pp. 9–14.

<sup>15</sup> J. Szpet, *Kompetentny katecheta*, in: *Katecheza – Rodzina, Parafia i Szkoła*, 2003, pp. 11–12.

<sup>16</sup> J. Stala, *Umiejętność działania nauczyciela religii i katechety*, pp. 161–170.

<sup>17</sup> R. Kwaśnica, *Ku pytaniom o psychopedagogiczne kształcenie nauczycieli*, in: Z. Kwieciński, L. Witkowski (eds.), *Ku pedagogii pogranicza*, Toruń 1990, Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, p. 296.

<sup>18</sup> E. Alberich, *Katecheza dzisiaj. Podręcznik katechetyki fundamentalnej*, Warszawa 2003, Wydawnictwo Salezjańskie, p. 302.



Moral competence is considered to be the most important among them. This is expressed in an in-depth reflection of a moral nature, the ability to accurately assess each behaviour, knowledge and implementation of ethical duties towards pupils, their parents, the school, the community of the Church, which sends the religious teacher with the mission of teaching and educating in the faith.<sup>19</sup> Respect for the dignity of the pupil and the other actors involved in the educational process, as well as their subjective treatment, is also important here.

Another group is communication competences. Broadly speaking, these consist of the ability to dialogue with others. Their possession is evidenced not only by the ability to use language effectively and to adapt it to the pupils' perceptive capacities, but also, the ability to empathize, to listen actively and constructively, to understand and determine meaning and to express one's own opinions in a non-directive way.<sup>20</sup> Skills concerning both verbal and non-verbal communication, the culture of the religion teacher's language and respect for the rights of others, all important in this respect. In this way, the religion teacher "becomes a direct mediator who facilitates communication between persons and the mystery of God and between persons in the community."<sup>21</sup> He should be a man of definite principles and broad horizons. To have authority, having on the one hand the mission of a master, and on the other hand a friendly praise over the protégé.<sup>22</sup>

A manifestation of social competence is the proper understanding by the teacher of religion/catechist of the relations occurring between his/her own person and the attitude adopted during educational interactions, as well as the relations existing between the teaching and upbringing style preferred by the person of the teacher and the processes taking place in the school classroom.<sup>23</sup>

Summing up the above, it should be emphasized once again that a religion teacher/catechist should possess multifaceted competences. These refer both to the ability to implement the process of religious education, personal qualities and also to social competences.

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<sup>19</sup> *Dyrektorium Ogólne o Katechizacji* 156.

<sup>20</sup> A. Skreczko, *Współpraca z rodzicami a umiejętności komunikacji katechety*, in: *Katecheza – Rodzina, Parafia, Szkoła 2*, 2004, pp. 69–79.

<sup>21</sup> *Dyrektorium Ogólne o Katechizacji* 156.

<sup>22</sup> J. Stala, *Umiejętność działania nauczyciela religii i katechety*, p. 164.

<sup>23</sup> W. Strykowski, J. Strykowska, J. Pielachowski, *Kompetencje nauczyciela szkoły współczesnej*, p. 25–28.

## 2. Methodological elements of the conducted research

In order to elicit the opinions of secondary school students on the person of a religion teacher, selected results of the nationwide research under the project “Religious education of Polish youth – current state, opportunities and challenges” were analysed.

Both quantitative and qualitative research was conducted in December 2022 and January 2023. The empirical research covered secondary school students of general and technical secondary schools with a particular focus on first and fourth grades (final year of secondary school – in Polish *maturalny*).

Both qualitative and quantitative research took place in two stages. In the first stage, a pilot study was conducted, the main aim of which was to validate the research tools used in this research. The quantitative research used the diagnostic survey method, the survey technique, and the survey questionnaire was the research tool. The primary research was carried out throughout Poland, equally in all sixteen voivodships. The quantitative study involved 1,672 secondary school students; in accordance with the research assumptions, a minimum of 100 people were surveyed in each province in Poland.

The qualitative research, on the other hand, used the in-depth interview method; the research tool was an interview scenario. The interviews were conducted in four extreme dioceses (north – Gdansk diocese, south – Krakow diocese, east – Lublin diocese, west – Wroclaw diocese). The qualitative study involved 120 secondary school students, 30 from each diocese listed. As in the quantitative study, the adolescents surveyed attended the first and last years of secondary school. 63 females and 57 males took part in the survey, making up 53% and 47% of all respondents respectively. In contrast, the aspect of the ratio of the class which the young people attended ranked equally at 50% – half of the students were first graders and half were fourth graders.

### 3. Teacher/catechist competences in the light of research findings

#### a. Analysis of quantitative research results

Like the catechist-teacher, the catechist-educator should also possess certain qualities and be characterized by certain personality traits.<sup>24</sup> Among a number of qualities and those resulting from the catechist's function as an educator, the following should be included: love, empathy, respect, educative contact, openness, attentive listening, joy and cheerfulness. In the nationwide research on religious education of Polish youth, the survey questions included those on positive and negative qualities of a religion teacher.

The chart below shows the catalogue of positive qualities with which respondents used to describe their religion teachers. It is gratifying that as many as 1548 students positively evaluated their RE teachers/catechists (N=1548).

As the most important positive qualities of a religion teacher, the secondary school pupils mentioned, above all, the fact that he/she is kind (58.6%), engaged in class (28.1%) and friendly (25.2%). Other important positive characteristics were: open-mindedness 17.0%, understanding 13.1%, possessing a lot of knowledge 11.3%. Slightly lower percentages were received for qualities such as: helpful 9.8%, calm 4.4%, 'laid-back' 3.7%.

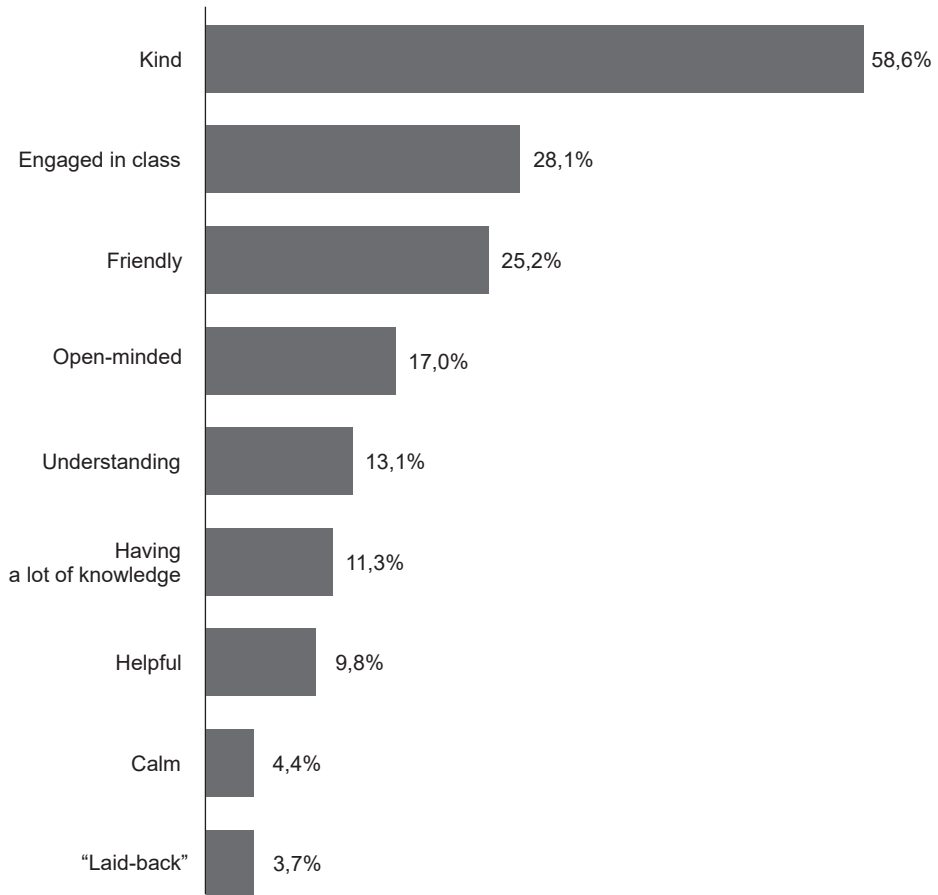
It should be noted that among the positive qualities of a religion teacher, respondents most often indicated his/her character and personality traits. Substantive competences were not so important for them, although a large group of respondents stressed their importance.

The catechist and the catechized are subjects between whom there is mutual contact and interaction. Catechesis is precisely what happens between them in purely human terms. The way in which it happens depends upon both parties. The catechized is the active party. The catechist, therefore, cannot introduce him/her to the world of Gospel values without his/her free will. At the same time, however, it is the catechist who inspires the contact, directs it and sets the

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<sup>24</sup> S. Dziekoński, *Podmiotowy charakter wychowawczego działania katechety*, in: J. Stala (ed.), *Dzisiejszy katecheta*, Kraków 2002, Wydawnictwo WAM, pp. 89–109; R. Pomianowski, *Ważność tożsamości katechety w interakcji katechetycznej*, in: M. Majewski (ed.), *Formacja katechetów*, Kraków 1990, Poligrafia Salezjańska, p. 40; J. Bagrowicz, *Formacja katechetów w świetle dokumentów Kościoła*, "Ateneum Kapłańskie" (1994), 513/514, pp. 215–226; C. M. Sondej, *Osobowość katechety w opinii uczniów*, in: M. Śnieżyński (ed.), *Pedagogika w katechezie*, Kraków 1998, Wydawnictwo Naukowe Papieskiej Akademii Teologicznej, pp. 21–48.

**Chart 1.** Positive characteristics of a religion teacher



Source: own study based on the results of the audit survey, November 2022 – January 2023, N=1548

tone, which can be very different.<sup>25</sup> In this respect what is important is to have communicative and social competence. “The catechist is essentially a mediator. He/she facilitates communication between the people and the mystery of God, between subjects amongst themselves, as well as with the community.” (General Directory For Catechesis #156)

At present, a very worrying and increasingly common phenomenon in catechesis is aggression directed towards the catechist. Lack of pedagogical talent and experience, as well as coercing behaviour desired by the catechist, most often foster disrespectful, ignorant and even aggressive attitudes among the catechized.<sup>26</sup>

Such catechetical interaction creates more harm than benefit in the long run. It can distance the catechized person from an encounter with God, rather than bringing him closer to Him. There is no doubt that the commonly perceived violence and intolerance in society has its origins also in violent behaviour towards children and adolescents.<sup>27</sup> Hence, it is important that the catechist, when confronted by youth aggression or contestation of the Church’s teachings, does not react too violently or hastily judge these attitudes. “An attitude that judges everything in advance, without a desire to understand the young, would be unedifying. The catechist is called to be on the journey together with the catechized, to seek together with them and to experience with them the joy of discovering the truth. He is in solidarity with their anxieties and often anxious rebellion, but not to push them towards doubt, but to be a guide towards hope.”<sup>28</sup>

Another extreme that is increasingly common in schools is an overly liberal attitude towards the pupil. This is also often the case in catechesis, according to a misconception of freedom. This position, which refers to unfettered freedom and freedom of choice on the part of the individual, assumes that the child should not be disturbed, should be given full space to choose, and that the child will develop properly on its own (pedagogical naturalism, anti-pedagogy). “There are positive elements in this approach, such as great respect for the human person and the renunciation of violence, but it does not take into account that

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<sup>25</sup> R. Pomianowski, *Katecheta – terapeuta duchowy*, in: M. Majewski (ed.), *Postawy katechetów*, Kraków 1996, Poligrafia Salezjańska, p. 65.

<sup>26</sup> H. Slotwińska, *Agresja i przemoc wśród młodzieży*, in: S. Kulpaczyński (ed.), *Katechizacja młodzieży*, ed. S. Kulpaczyński, Lublin 2003, pp. 307–333.

<sup>27</sup> R. Pomianowski, *Katecheta – terapeuta duchowy*, pp. 65.

<sup>28</sup> J. Bagrowicz, *Katecheta – chrześcijański wychowawca*, in: M. Majewski (ed.), *Postawy katechetów*, Kraków 1996, Poligrafia Salezjańska, pp. 57.

everything noble in human, including human's attitudes towards God, are not innate qualities, but acquired with the significant contribution of others. The developing individual must first come to know them. This cognition takes place with the help of other people, especially educators, who introduce their pupils to the world of general human values, and catechists to the world of religious and moral values.<sup>29</sup> There are certainly many reasons for this liberal approach. However, the ones most often cited by teachers themselves include a lack of faith on their part in the effectiveness of their educational impact, or too low a salary for their work, which does not motivate them to make such a great effort. This leaves us with the belief that one day these educators themselves will realize just how far they have missed their calling and responsibility to be a role model to their pupils through personal presentation and professional conduct.

For the sake of full objectivity, let us also look at the negative qualities that catechized students perceive in their RE teachers (N=252). The most common characteristics cited by the students are that he/she is: contemptuous (21.4%), has difficulty in conducting the lesson smoothly (18.4%) and brings up content during the lesson that is inappropriate from the students' point of view (18.4%), imposes his/her opinion (16.5%). In addition, for 12.1% of the pupils the catechist is 'closed', whereas for 10.7%, he is easily angered. Respondents also believe that the religion teacher: does not respect their opinion 9.2%, is too demanding 8.7% and not tolerant 6.8%.

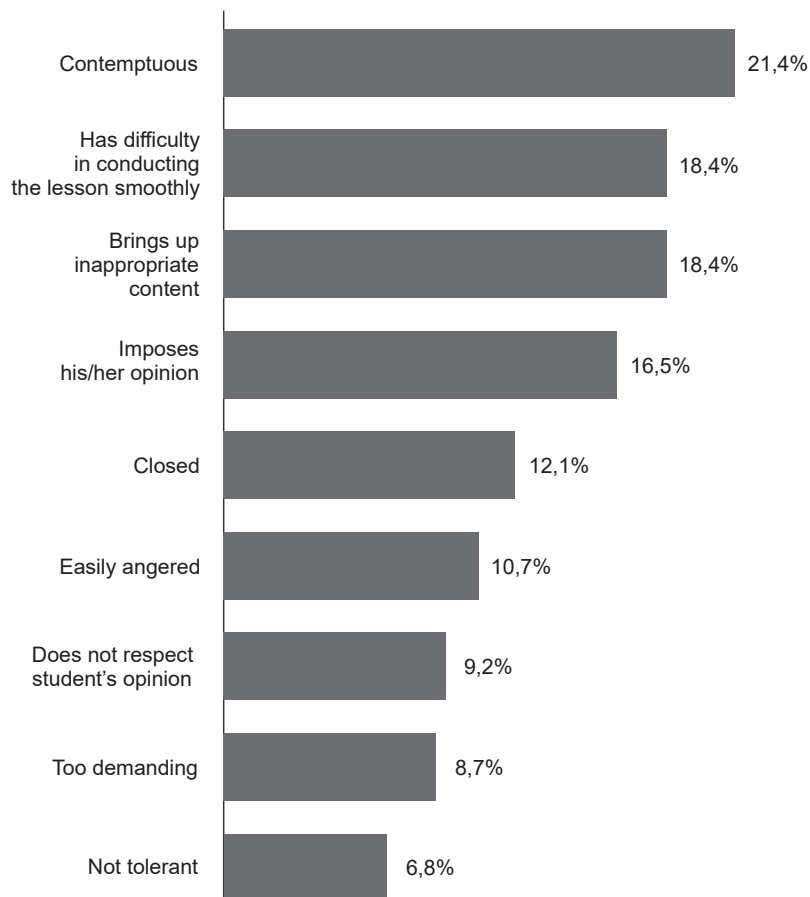
Considering the number of N=1548 positive opinions and N=252 negative opinions, this proportion clearly indicates that by far, the overwhelming number of catechized young people have a positive perception of their religion teacher. Nevertheless, this does not change the fact that emerging negative behaviour of catechists should be eliminated immediately. And while opinions such as, he or she tackles on inappropriate content or imposes his or her own opinion, may have no substantive justification, the other negative characteristics require permanent formation and supervision by school and Church authorities.

Overconfidence or authoritarianism on the part of the educator can be a detriment to establishing a bond and understanding. The catechist has an advantage over the pupil: he/she has theological knowledge, he can disregard the pupil's simple and naive questions, and by the same token, refer to the pupil with contempt and disregard. In such instances, there may be a desire to demonstrate his superiority, a temptation to ridicule the more unconcerned student. Such

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<sup>29</sup> R. Pomianowski, *Katecheta – terapeuta duchowy*, pp. 65.

**Chart 2.** Negative characteristics of a religion teacher



Source: own study based on the results of the audit survey, November 2022 – January 2023, N=252

an educator who speaks from the position of the sole holder of the truth, who must always and everywhere be right, will not be able to have an educational and effective impact. If he/she is not characterized by humility towards the truth, as well as humility towards the educator, he can easily spurn and discourage students.<sup>30</sup>

Marian Śnieżyński believes that, among other things, such elements as the emotional involvement of the catechist and the creation of an atmosphere of co-partnership in the classroom, can facilitate educational contact and thus contribute to its more effective impact.<sup>31</sup> According to this author, the catechist's emotional involvement in what he does is very important. The teacher's attitude to his subject and to the children often determines the pupils' attitude to learning. The more personal effort the catechist puts into the very course of catechesis, the more he/she lives what he is doing, the more easily he/she will encourage the pupils to work together. Also, creating an atmosphere of co-partnership in the classroom is good for the development of mutual relations. Neither an overly strict nor an overly liberal teacher will be a person who mobilizes his/her students to work.

Autocracy in teaching and in education creates a psychological barrier. The teacher is perceived as one who: instructs, delegates, requires, commands, prohibits, punishes. This type of behaviour on the part of the catechist/RE teacher can cause such reflexes in pupils as lying, aggression, rebellion or apathy. On the other hand, a liberal attitude, an attitude of ill-understood kindness and excessive submissiveness toward students, induces in them the conviction that both the catechist and the catechesis do not deserve to be taken seriously.

As the aforementioned M. Śnieżyński further states, "the most desirable style of work will be a democratic approach, which will manifest itself, among other things, in a dialogue between the teacher and the students, in giving instructions or orders, but after consulting the class. Partnership means co-determination, clarification of different positions and opinions, allowing students to voice their rationale and opinions. Partnership born in the course of democratic leadership is respect for students, it is noticing and understanding their problems, it is the teacher's contacts with students transferred also to breaks, as well

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<sup>30</sup> J. Bagrowicz, *Katecheta – chrześcijański wychowawca*, in: M. Majewski (ed.), *Postawy katechetów*, Kraków 1996, Poligrafia Salezjańska, pp. 59.

<sup>31</sup> M. Śnieżyński, *Nauczanie wychowujące*, Kraków 1995, Wydawnictwo Naukowe Papieskiej Akademii Teologicznej, pp. 97–98.



as extracurricular activities.”<sup>32</sup> Following some psychologists and educators, we can offer a number of typical personality traits that a teacher should have. In addition to those discussed above, he mentions a sense of responsibility and duty, the need for permanent improvement, love, courage, a sense of humour, vividness of imagination, the ability to express feelings, a tendency to social action, artistic abilities.

The presented list of qualities of an RE teacher/catechist is certainly not exhaustive. However, it allows us to see that the personality traits of a catechist, combined with substantive knowledge and appropriate psychological and pedagogical preparation, are an essential factor in religious education.

#### b. Analysis of the results of the qualitative research

Within the framework of the project “Religious Education of Polish youth – current state, opportunities and challenges”, young people participating in the qualitative research also had the opportunity to comment on the person of a religious education teacher-catechist. The interview scenario included questions that dealt with ways of implementing religious education in Poland.

Among the categories of statements concerning positive opinions about RE lessons in schools, we can distinguish those that refer to the person of the RE teacher. As the survey results indicate, the person and personality of the teacher plays an important role in the evaluation of religious lessons at school.

The data obtained during the interview shows that the passion of the religion teacher, his/her attitude of openness, lack of coercion directed at students, mainly influences the positive evaluation of RE lessons at school. This fact was emphasized by 51 out of 120 respondents, accounting for 42.5% of respondents from four dioceses, the highest number emanating from the Diocese of Lublin, although the number of statements between dioceses does not differ significantly from one another. Selected authentic statements from respondents read as follows: “For example, yesterday we had a lesson on Islam. There, the catechist talked about how Islam came into existence, how it all came into existence. Well, and all in all, he taught us a little there about the religion, what the holy books are. But at the same time, he talked about the differences between the Church, between our faith and the faith in Islam.” (IDI, M., DIEC. KRAK. LO, KL. I);

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<sup>32</sup> M. Śnieżyński, *Nauczanie wychowujące*, pp. 98.

“I mean yes from my point of view, it’s nice when the teacher tells with such passion, it’s impossible in all. It’s a pity yes, but if the teacher just sort of loves to teach and knows how to pass on that knowledge, then you listen to it better right away.” (IDI,K, DIEC. LUB. LO, CL. I); “I rate religion lessons very well with me. As I said I’ve been learning new things and expressing my opinion, we talk, we just talk among ourselves, as well as with the priest about all the things that are going on in the world. There is no such topic that we don’t talk about.” (IDI, K, DIOC. KRAK. CL. I).

Among the statements made by the respondents, there were also some that contained negative opinions with respect to religious lessons at school. Some of the categories of statements were about the religion teacher catechist.

A negative evaluation of religion lessons can also be determined by the attitude of the religion teacher/catechist, such as: lack of openness to the views of students (N=24), low personal culture of the religion teacher (N=24) and low level of his commitment (N=19). While the opinion regarding openness to pupils’ views may seem debatable (all can be heard, not all should be agreed with), the teacher’s low personal culture and low degree of involvement in the lesson process should be of concern to both religion teachers and those responsible for their preparation for the profession of faith, as well as their spiritual formation.

Responses in the ‘other’ category, included the teacher imposing views, judging students by their attendance at Mass, lack of tolerance on the part of the teacher, too much material covered in catechesis, students arguing with the teacher, boring lessons. Some authentic sample statements from students are: “He says something for 10 minutes, for example, about Saint Maximilian Kolbe, well, and then says we have time to ourselves. Well, and we do what we want. There some people sit on their phones, some people talk.” (IDI, M. DIEC. KRAK. LO, CL. I); “We had remote religions, but we also had another priest at that time, who completely didn’t come to these lessons, treated them very lightly, practically didn’t attach any importance to them.” (IDI, M. DIEC. KRAK. LO, KL IV); “He didn’t tell stories in an interesting way, and more than once it was clear that he chose controversial topics on purpose in order to make someone disagree with him, but not to invite discussion, but just to baffle someone that way.” (IDI, K. DIOC. GDAŃ. TECH. CL. IV).

## 4. Summary

The analysis of the literature on the subject, as well as the results of quantitative and qualitative studies on the religious education of young people in Poland, clearly indicate the role played by the RE teacher/catechist in the process of teaching religion, upbringing in the faith and in formative activities directed towards his charges. Important in this regard is his/her wide range of competencies that allow him to effectively carry out the mission to which he has been called. Although many researchers emphasize the importance of the praxeological competencies of RE teachers, the analysis of the literature and the results of the studies conducted in Poland, indicate that the social competencies and personality traits of the RE teacher are also of great importance. In view of the above, it is necessary to re-examine all the findings on the permanent formation of RE teachers/catechists. After all, in addition to the strictly substantive and methodical preparation, should there not be an increased emphasis on the formation of his/her religious-moral attitudes, social-communicative competence and the development of pedagogical creativity? As a continuation of the search for RE teacher/catechist competences, a critical revision of the relationship between catechesis and religious education at school in Poland may be needed.

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## **The Analysis of Ukrainian Policy in the Field of State-Religious Education: Secondary School**

### **Abstract**

The article provides an overview of approaches to the organization of religious education in secondary schools of Ukraine during the period of its independence, which complements the European experience of studying this issue. Attention is paid both to the historical circumstances of the beginning of school religious education in the interaction of religious, state and educational institutions, and to modern issues related to the policy of introducing subjects of religious and moral orientation in Ukrainian schools. The current legislation in the field of religious education in a secular school, the real practice of its implementation, and the challenges that give an idea of the specifics of Ukraine in this matter in the European space, are analyzed. The legislative work of Ukraine on resolving the issue of legal regulation of the possibility of establishing educational

institutions of different levels of accreditation by religious organizations is generalized. Statistical data on the state of teaching religious and moral subjects in schools of Ukraine are analyzed. Prospects and possibilities of further teaching of religious education in the Ukrainian public school are considered.

### **Keywords**

education, religious education, subjects of religious and moral orientation, religious organizations, normative-legal base, state-confessional relations

### **Introduction**

The war conflict undoubtedly had a significant impact on the education system at secondary schools in Ukraine and brought questions of ethics and religiosity into the education system<sup>1</sup> In promoting this new lifestyle in the education system this study encourages believers to adopt practices that prioritize sustainable living, responsible resource use, and a deep appreciation for the educational world.<sup>2</sup>

Furthermore, the diverse cultural, historical, and religious backgrounds across the European continent contribute to a wide range of perspectives on the role of religion in education. The influence of political movements, therefore, varies from country to country, shaping the policies and methods employed in religious education.<sup>3</sup>

As European societies continue to evolve, the discourse on religious education in public schools remains a dynamic and evolving conversation. Scholars, policymakers, and educators engage in ongoing dialogue to navigate the delicate balance between political considerations, educational objectives, and societal values to ensure a comprehensive and inclusive approach to religious education across the continent. There is also need to connect young and old generation

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<sup>1</sup> Radková L, Ludvig Cintulová L, Brédová S, Budayová Z, *Analysis of mental wellbeing of volunteers at the border crossing Vyšné Nemecké due to war conflict in Ukraine*, "Acta Missiologica" 16 Nr 2 (2022), p. 170.

<sup>2</sup> Jarmoch, Edward Zygmunt (eds), *Social Work and Socio-Pathological Phenomena in the School Environment*, "Acta Missiologica" 16 Nr 2, (2022), pp. 141.

<sup>3</sup> Černek, M (eds), *Distance learning at universities in central and eastern Europe during the covid-19 pandemic: a pilot comparative study*, "Acta Missiologica" 17 Nr 1 (2023), pp. 169.



to support understand, sharing knowledge and social resilience due to disharmony in the society.<sup>4</sup>

The system of indoctrination and its implementation into the socio-political system requires the coordination not only of educational institutions, national programs, but also the training and preparation of pedagogues who can connect and lead religious education not only formally, but also actively taking into account the specific needs of groups of citizen-migrants, marginalized groups and disadvantaged young people.<sup>5</sup> The need for ongoing professional development for educators has been highlighted. The post-COVID era may see increased investment in training educators to adapt to evolving teaching methods, technology integration, and addressing the socio-emotional needs of students.<sup>6</sup>

The influence of political movements on the state and methods of religious education in public schools on the European continent has, in recent times, increasingly become in recent times, a subject of both scientific analysis and reflection on the existence of various approaches and ways of organizing religious education. In most countries in the post-Soviet space, the experience of the relationship between political movements and the state of religious education is still in a position of unstable definition and various challenges. The state of Ukraine is no exception in this process. However, the situation and trends in religious education in public schools in Ukraine, unfortunately, are not covered in international studies. Thus, Elsa Kuyk, Roger Jensen, and others in their work "Religious Education in Europe"<sup>7</sup> review more than thirty European countries, thirteen of which were previously in the socialist camp. However, the state of religious education in Ukrainian schools is not taken into consideration in this study; neither does the study entitled "Religion and

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<sup>4</sup> Bundzelová K, Ludvigh Cintulová L, Buzalová S, *Sociálna práca s osobami vyššieho veku*, Bratislava 2023: Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety v Bratislave, p 119.

<sup>5</sup> Cauda R.; Ondrušová Z, Tománek P, Hardy M, *We shall start health intervention against collateral Effect of Pandemic to metabolic, cardiovascular and mental health in migrants, children and caregivers*, "Clinical Social Work and Health Intervention" 12 Nr 3 (2021), pp. 6–8.

<sup>6</sup> Ludvigh Cintulová L, Tománek P, *The view of today's youth of an ideal teacher in primary education*, "Przegląd Nauk Stosowanych Gliwice": Gliwicka Wyższa Szkoła Przedsiębiorczości 22 Nr 1 (2020), pp. 31–36

<sup>7</sup> E. Kuyk, R. Jensen, D. Lankshear, *Religious Education in Europe: Situations and Current Trends in Schools*, Oslo, Norway, 2007, IKO Publishing House.

Education in Europe: Developments, Contexts and Debates”<sup>8</sup> by R. Jackson, S. Miedema. Analyzing the relationship between school and religion in Europe, J.-P. Willaime in the book “Europe et religions. Les enjeux du XXI siècle”<sup>9</sup> also does not consider the Ukrainian element of the problem. We do not find relevant publications about Ukraine in European periodicals. Therefore, we will try to investigate this issue within this article.

It should be noted that since the proclamation of Ukraine’s independence, both state institutions and religious organizations have displayed uneven interest and unequal desire to introduce a state-religious component in the field of school education in Ukraine. Thus, in several regions of western Ukraine, the filling of the secular education system with religious subjects began practically with the proclamation of independence, with the support of regional authorities of Church initiative, in a context of increased religiosity of the population, compared to Eastern regions of Ukraine. But the spread of the religious educational cluster in other regions of Ukraine saw a shift only at the beginning of the new millennium, almost a decade and a half later, on the basis of national regulations of the Ministry of Education and Science of Ukraine. Subsequently, the educational policy regarding the introduction of the religious component in the field of secular education at the secondary school level changed, depending on the political and social processes in the Ukrainian state. The analysis of this connection is quite relevant for solving not only the issues of integration of secularism and religiosity in public school education, but also the problems of development of Ukrainian democratic freedoms in general on the way to European integration.

It should be noted that since the time of independence in Ukraine, issues concerning the place of religious education in public schools are constantly discussed during round tables, debates, conferences on religious and administrative issues. In the published materials, we find legal and educational research on the introduction of the religious component in secondary schools of Ukraine. Some problems of this type are reflected in the publications of M. Lagodych (“Problems

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<sup>8</sup> R. Jackson, S. Miedema, W. Weisse & J.-P. Willaime (Eds.), *Religion and education in Europe: Developments, contexts and debates*, Münster, 2007, Waxmann Verlag GmbH. [https://www.researchgate.net/publication/282671898\\_Religion\\_and\\_Education\\_in\\_Europe\\_Developments\\_Contexts\\_and\\_Debates](https://www.researchgate.net/publication/282671898_Religion_and_Education_in_Europe_Developments_Contexts_and_Debates) (05.06.2022).

<sup>9</sup> Willaime JP, *Europe et religions. Les enjeux du XXIe siècle*, Paris 2004, Fayard, Les dieux dans la cite.

of teaching Christian ethics in secondary schools of Ukraine”),<sup>10</sup> V. Yelensky (“Religious education in the laws and educational systems of Western European countries”).<sup>11</sup> I. Bunakova considers ethical and religious education as a basis for the formation of civic values.<sup>12</sup> E. Mulyarchuk explores the influence of Christian morality on modern problems of society.<sup>13</sup> Y. Kalnysh considers state and religious issues of the formation of theological schools in Ukraine.<sup>14</sup> The study of the interaction of religious institutions with government agencies on certain issues in the field of education in modern Ukraine, was carried out by the following well-known Ukrainian theologians and specialists in state-confessional relations: V. Bondarenko, M. Babiy, M. Zakovych, S. Zdioruk, A. Kolodny, Y. Reshetnikov, O. Samoilenko and others. The systematic analysis of the influence of religious and state institutions on the transformation of educational policy in Ukraine, regarding the introduction of the religious component in public schools of Ukraine, remains poorly studied. Actually, this article is aimed at disclosing this issue.

Study<sup>15</sup> addresses a significant gap in existing research by undertaking a systematic analysis of the influence of religious and state institutions on the transformation of educational policy, specifically regarding the incorporation of the religious component in public schools. By delving into this less-explored area, the article seeks to contribute to a deeper understanding of the complex interplay between religion, education, and state policies in EU. On the other hand, it is important to connect educational policy with inclusion of marginalized students to be successfully included at secondary school. Educational policies should be designed with inclusivity in mind. This means creating policies that address the diverse needs of students, including those who may be marginalized

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<sup>10</sup> M. Lagodych, *Problems of teaching Christian ethics in secondary schools*, “Scientific Bulletin of Chernivtsi University”, Chernivtsi, 2003, Ruta, 163–164, pp. 75–78.

<sup>11</sup> V. Yelensky, *Religious education and upbringing in the laws and educational systems of Western European countries*, “Man and the World” (2001), pp. 32–36.

<sup>12</sup> I.V. Bunakova, *Ethical and religious education as a basis for the formation of spiritual and moral values*, “Philosophy and Political Science in the context of modern culture”, Dnepropetrovsk, 2 (2011), pp. 59–64.

<sup>13</sup> E. Mulyarchuk, *The problem of social implementation of religious morality*, “Philosophical thought” 1 (2006), pp. 110–130.

<sup>14</sup> Y. Kalnysh, *Theological schools in Ukraine: a general overview*, “Human and World” (2001), pp. 32–37.

<sup>15</sup> Kondrla P, Trstensky F, Datelinka A, *Social teaching of the church and the values of a sustainable society*, “Acta Missiologica” 17 Nr 2 (2023), pp. 143–153.

due to factors such as socio-economic status, disability, cultural background, or language proficiency. The regular monitoring and evaluation of the effectiveness of inclusive policies are essential. This involves collecting data on student outcomes, identifying areas for improvement, and making adjustments to policies based on evidence and feedback<sup>16</sup>. The pandemic has shown the potential for global collaboration in it. Post-COVID, there will likely be a heightened commitment to addressing equity issues, ensuring that people have access to quality education and resources.<sup>17</sup>

The aim of the article is to study the main trends in the educational policy of Ukraine on the integration of religiosity and secularism in education, in the context of disclosing the state and public attitude to the introduction of religious and moral subjects in secondary schools of Ukraine of I-III degrees, since the time of its independence.

Objectives of the article are: to describe the stages of the policy of religious and moral subjects introduction in secondary schools of Ukraine; to highlight the problematic aspects of the policy of introduction of these subjects in schools of Ukraine; to review the legislative work on the legal regulation of the introduction of religious educational institutions by religious organizations; to determine the best options for further integration of religious and secular education in the public school.

## 2. Development

The initial experience of including religious components in the programs of secondary educational institutions during the period of Ukraine's independence, began in the first half of the 1990s in the Western region of the country. The initiators on the religious side were the Ukrainian Greek Catholic Church, the Roman Catholic Church and the Orthodox Churches. This activity of cooperation is explained by the largest percentage of concentration of the religious network of Ukraine in the Western regions at that time. Cooperation with

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<sup>16</sup> Ludvigh Cintulová L, Budayová Z, Juhásová I, *Health of Roma People living in marginalized Communities in Slovakia*, "Clinical Social Work and Health Intervention" 14 Nr. 1 (2023), pp. 7–15.

<sup>17</sup> Ludvigh Cintulová L, Beňo P, Pavlovičová T, *Aspects of social services and well being in post covid era*, "Int J Health New Tech Soc Work" 18 Nr 3 (2023), pp. 106–114.

secular educational institutions provided religious organizations with the following opportunities: the use of state infrastructure resources, partly staffing and methodological support, which facilitated the solution of financial and organizational issues in this context.

In 1992, these initiatives of Churches and religious organizations were supported by the state regional administrations of Ivano-Frankivsk, Lviv, Ternopil regions; later in 1993–1994 Volyn, Zakarpattia, Rivne and Chernivtsi regions, which adopted appropriate decisions on the teaching subjects of spiritual and moral orientation. Thus, from the beginning of the nineties of the last century, up to 2005, the legal provision of teaching religious subjects was regulated by normative legal acts of regional significance (relevant decisions of regional state administrations), which were lobbied by Churches and religious organizations.

It should be noted that since 2002, the issue of introduction of religious subjects of spiritual and moral orientation in secondary schools, has gradually been introduced at the state level.

However, with the publication of the order of the President of Ukraine V. Yushchenko -11-1 / 657 of July 8, 2005 “On the improvement of state-church relations, restoration of violated rights and legitimate interests of religious organizations, acceleration of solving urgent problems in their activities”, and subsequently a number of orders and letters of the Ministry of Education and Science of Ukraine in the context of this issue (order of the Ministry of Education and Science of Ukraine 2005 № 437 of July 26, 2005 “On studying optional courses in ethics of faith and religious studies”; letter of the Ministry of Education and Science); of Science of Ukraine № 1 / 9-436 dated August 18, 2002 “On the study of ethics in the 2005/2006 academic year”<sup>18</sup>) began nationwide legal regulation of the presence of religious education in public schools and the all-Ukrainian introduction of religion-oriented courses of spiritual and moral orientation in almost all other regions of Ukraine.

Being, without a doubt, a powerful and decisive step on this path after the Soviet period, these regulations are important in three respects. Firstly, as a fact that meant the legitimization at the state level of the study of religion in the

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<sup>18</sup> *On the study of ethics in the 2005/2006 academic year. Letter of the Ministry of Education and Science of Ukraine dated 18.08.2002 № 1 / 9-436 / Collection of normative legal acts on the introduction of subjects of spiritual and moral orientation in the education system of Ukraine, Kyiv 2006, KMPU, pp. 44–55.*

general public school of any region of Ukraine. Secondly, as a concept of teaching religious courses of spiritual and moral orientation, which declared a list of principles of such study. Thirdly, as a choice that outlines the priority direction of the development of religious education in the democratic plane. The great merit of the innovation was that, as an act of political will of the then-president, it stimulated what had long been in decline – the religious and legal direction of educational research on the place and role of the religious component in the content of school education, which was a sign of positive change in the humanistic field of modern science.

Simultaneously with the process of introducing spiritual and moral subjects in secondary schools of Ukraine, there emerged the task of solving a number of problematic issues that required the participation of both state and religious structures, namely: determining the status of subjects, their names, methodological support of the educational process, staffing competent specialists, a number of financial issues, public reactions, regulation of the participation of Churches and religious organizations in the implementation of the religious component of education in public schools, in accordance with current legislation.

It should be noted that during the first decade of Ukraine's independence, the solution of these issues was unsystematic, as the process of introducing the above subjects in secondary schools of Ukraine was sporadic. Let us consider the policy of further addressing the above issues related to the process of introducing religious courses of spiritual and moral orientation in schools of Ukraine.

Regarding the determination of the status of subjects of religious and moral orientation, the discussions unfolded in the context of the introduction of these subjects in the school curriculum, either on a compulsory or optional basis. In particular, some representatives of Churches and religious organizations advocated the introduction of these subjects on the basis of compulsory study. For example, according to a poll conducted by the Razumkov Center in 2013, this opinion was supported by 26.9% of believers. 43.2% of respondents believed that the basics of religious teachings can be taught in schools only optionally at the choice of students and/or parents.

However, taking into account the current legislation (Article 35 of the Constitution of Ukraine, Article 5 of the Law of Ukraine "On Freedom of Conscience and Religious Organizations of Ukraine", Articles 6 and 8 of the Law of Ukraine "On Education"), which approved the principles: separation of church and religious organizations and states; secular nature of education; the independence of state and municipal educational institutions from religious organizations,

as well as the fact that Ukrainian society includes both religious and non-religious communities. As a result of discussions, the Ministry of Education and Science of Ukraine approved a decision on the introduction of religious and moral subjects in the educational process, on the basis of electives, and subject to choosing this course by students or parents, as based on writing parental statements. These principles were first reflected in paragraph 4 of the order of the Ministry of Education and Science of Ukraine №437 of July 26, 2005 “On the study of optional courses in ethics of faith and religious studies” in educational institutions and further; In spite of the desire for change by religious organizations, this was not adjusted.

Regarding the decision on the issue of the specific name of the subjects of religious and moral orientation, it should be noted that there was no single model norm, as it depended on the regional specifics of the concentration of the religious network of the country. To address this issue in the summer of 2005 (according to the decree of the President of Ukraine -11-1 / 657 of July 8, 2005), a commission was established at the Ministry of Education and Science to develop the content of optional courses of religious and moral orientation. According to the results of the commission’s work, the name of the subject “Fundamentals of Christian Ethics” was proposed.<sup>19</sup> However, it should be noted that a certain part of the public did not agree with the above decision of the commission, namely: this course limited the rights of non-Christian religions and non-believing communities.

### 3. Discussions

Discussions led to the fact that, in 2006, the Ministry of Education and Science of Ukraine approved the “Conceptual framework for the study of spiritual and moral subjects in secondary schools”, which took into account the proposals of the Forum of Atheists of Ukraine, a number of public and human rights organizations, some religious communities (Muslims, Jews and some Protestant churches). In particular, in Chapter III, among the explanation of the purpose of studying courses of spiritual and moral orientation, it is stated that the implementation of spiritual and moral education at school takes place “on

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<sup>19</sup> O.A. Samoilenko, *Religious education and upbringing in the system of secular education: the problem of interaction* “Ukrainian Polonistics” 6 (2009), p. 72.

the basis of Christian (within the course “Fundamentals of Christian Ethics”), Muslim, Jewish or other religious teachings (within the course “Fundamentals of Religious Ethics”), or on the basis of scientific and philosophical principles (within the course “Ethics”).<sup>20</sup> Thus, conditions are provided for the realization by the followers of the respective religious communities of the right to bring up their children in accordance with their own religious beliefs.

To date, there is a fairly wide range of names of these subjects that are taught, but it is to be noted that most of these subjects are Christian and still do not reflect the religious diversity of Ukraine.

Regarding the issue of educational and methodological support of the educational process, we note that the solution of this issue at the national level, as well as the rest of the above, began after 2006. Until 2005, methodological support of these courses was advisory and unsystematic. Since 2006, the relevant ministry has significantly narrowed the range of existing programs, giving preference not to individual authors, but to the programs of author groups, carrying out a more meticulous expert assessment, giving the relevant materials a positive stamp, recommending them for use in the educational process. Thus, we see that author groups at the level of their leaders have representatives of both academic and religious communities.

Regarding the solution to the issue of the teaching of these subjects by competent specialists, it should be noted that until 2005, this issue was also not regulated by the legal framework. In fact, such subjects were taught by both secular teachers and representatives of religious organizations. Settlement of this issue is provided by paragraph 8 of the order of the Ministry of Education and Science of Ukraine № 437 from July 26, 2005 “About studying in educational institutions of optional courses on ethics of faith and religious studies”, the letter of the Ministry of Education and Science of Ukraine № 1 / 9-436 from 18 August 2002 “On the study of ethics in the 2005/2006 academic year”<sup>21</sup>, paragraph 3 of the

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<sup>20</sup> *Conceptual bases of studying subjects of spiritual and moral orientation in general educational institutions (courses “Ethics”, “Bases of Christian ethics”, “Bases of religious ethics”) / Collection of normative-legal acts of introduction of subjects of spiritual and moral orientation in the system of education of Ukraine*, Kyiv 2006, Publishing house of Kyiv Pedagogical University named by B.D. Grinchenko, p. 48.

<sup>21</sup> *On the study of ethics in the 2005/2006 academic year. Letter of the Ministry of Education and Science of Ukraine dated 18.08.2002 № 1 / 9-436 / Collection of normative legal acts on the introduction of subjects of spiritual and moral orientation in the education system of Ukraine*, Kyiv 2006, KMPU, pp. 44–55.



decision of the Board of the Ministry of Education and Science of Ukraine № 8 / 1-2 of June 29, 2006 “On the conceptual foundations of the study of spiritual subjects in secondary schools moral orientation”. The texts of these normative legal acts state that pedagogical staff who have passed the relevant retraining courses in the institutes of postgraduate pedagogical education, can teach subjects of religious and moral orientation. Such institutes in Ukraine exist in all administrative-territorial units of Ukraine under the Ministry of Education of Ukraine, as well as at some pedagogical universities.

Regarding the basic training of teachers, starting from the 2008–2009 academic year, the Ministry of Education and Science of Ukraine introduced the specialization “Christian Ethics” (letter of the Ministry of Education and Science of Ukraine dated 17.05.2008 № 1 / 11-1825). The list of higher education institutions entrusted with training in the specialty “Christian Ethics” included several higher education institutions, among which there is a confessional, but state-licensed institution – the Ukrainian Catholic University (letter of the Ministry of Education and Science of Ukraine dated 12.09.2008 № 1 / 11-4302). Public institutions have also started experimental training in the specialty “Christian Ethics” for the following areas: 6.010102 “Primary Education”, 6.010106 “Social Pedagogy”, 6.020302 “History”, 6.020303 “Philology”, which still takes place in some higher education institutions. Thus, today the training of teachers of religious courses for secondary schools is provided by both state and one denominational institution of higher education. Therefore, a small layer of teacher-priests who teach at the school today have pedagogical diplomas of the state standard.

It should be noted that to this day, the profession “Teacher of spiritual and moral subjects (or teacher of the basics of religious / Christian ethics)” is not included in the State Classification of Professions under subsection “23 – Teachers”, which means no full legitimacy of a teacher teaching religious-oriented courses in public school.

As for the organizational principles of the educational process, the teaching of religious and moral subjects by the state, until 2022-23 academic year, is determined under the following conditions: parental consent (written statement addressed to the director of the educational institution) for their child to study the relevant elective course is required for teaching; the minimum number of groups in urban areas is eight students, in rural areas, four and the group may not consist of students of one class, but of the corresponding parallel; the number of hours of such subjects is 35 hours per year; such subjects are not graded.

Thus, the teaching of subjects of spiritual and moral orientation could be carried out in accordance with the following three available options:

1. in accordance with the decisions of regional councils or other local self-government authorities on the territory of the respective administrative-territorial units. In this case, such teaching can be both compulsory and optional;
2. as an optional teaching, in accordance with the order of the Ministry of Education and Science of Ukraine of July 26, 2005 № 437 “On studying optional courses in ethics of faith and religious studies” and conceptual principles of studying subjects of spiritual and moral orientation in secondary schools;
3. teaching at the expense of the invariant component in secondary schools with Ukrainian language of studying and study of ethics or courses of spiritual and moral orientation, according to Annex 13 to the order of the Ministry of Education and Science, Youth and Sports of Ukraine from 03.04.2012 № 409.

However, it should be noted that since the proclamation of Ukraine’s independence, there has been a fluctuation in the percentage of positive public opinion on the introduction of spiritual and moral subjects in Ukrainian schools. This is confirmed by sociological research. For example, according to the results of a sociological survey conducted in 2003–2004, commissioned by the State Committee of Ukraine for Religions on the question “How do you feel about the introduction of the subject “Christian Ethics” in the secondary school system?”, the vast majority of respondents (65.8%) answered – “positive”, 15.9% – “negative”, 18.2% – “indifferent.”<sup>22</sup>

The results of the above-mentioned sociological monitoring for 2010 and 2013, show that 38.4% (in 2010) and 38% (in 2013) of respondents chose the answer that the basics of religious teachings can be taught in schools only optionally by students’ and / or their parents’ choice”; and respectively 31% and 36.5% – “Religion should not be taught in secondary schools, for this there are Church Sunday schools.”<sup>23</sup>

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<sup>22</sup> The Church in Ukrainian society, V.P. Perebenesjuk (ed.), *Materials of sociological research*, Kyiv 2004, ViP, p. 28.

<sup>23</sup> *Religiosity of Ukrainians: level, character, attitude to certain aspects of the church-religious situation and state-confessional relations (results of national sociological research)*, Religion and power in Ukraine: problems of mutual relations. Information and analytical materials for

Thus, it can be stated that there is a decrease in the percentage of public support for the process of teaching subjects of moral and spiritual orientation in secondary schools of Ukraine. In addition, in 2014, in connection with the beginning of hostilities in eastern Ukraine, the aggravation of relations between the Orthodox Churches of the Moscow and Kyiv Patriarchates began, which reached its apogee when receiving the tomos from the Ecumenical Patriarchate. Inter-church disputes have influenced the further negative attitude towards the religious component in education, which the vast majority of society perceives not as one of the types of education, but as the mission of Churches.

In addition to these historical events, it should be noted that public opinion is influenced by democratic processes that evolve in the absence of a stable value framework. And these “delusions” are constantly generated through the constructs of imposing meanings on the society of consumption, which become a mechanism of deconstruction of educational values, including the religious ones.

Thus, public policy, scientific and pedagogical thought, inter-faith relations and public position, in their own way, influenced the general state and trends of teaching religious courses in public schools. According to the statistics of the Public Council for Cooperation with Churches and Religious Organizations at the Ministry of Education and Science of Ukraine, provided at the request of authors of this article, religiously-oriented spiritual and moral courses have been taught in all administrative and territorial centers since 2006. In recent years, the planned downward trend in the teaching of religiously-oriented subjects has been confirmed. Thus, if in the 2015–16 academic year such teaching was introduced in 6675 schools of Ukraine (38.5% of the total number of schools in the country), then in the 2019–2020 academic year only in 5279 schools (34.7% of the total number of schools). The overall percentage decrease is explained primarily by the religious and social processes mentioned above.

As for the map of regional distribution of schools covered by such training, its content differs significantly in different territorial-administrative units. This diversity can be explained, firstly, by the great achievements in the field of teaching subjects in Western Ukraine (started in 1992, before other areas). Secondly, the increased religiosity of the population, which is due to the fact that most of the Western regions before 1939 were outside the USSR and preserved the

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the Round Table “State-confessional relations in Ukraine as of 2013: the movement towards a partnership between the state and the Church or the crisis of relations?”, Kyiv 2013, p. 47.

**Table 1.** Comparison of the regional number of religious organizations with the number of schools covered by the teaching of Christian ethics (2020–2021)

Name of regions	Number of Ukrainian religious organizations (RO) on January 01, 2021										Number of schools teaching Christian ethics (CE) in 2020–2021 academic year			
	Total RO		Orthodox Churches		Catholic Churches		Protestant Churches				Place by number of CC	Place by the number of CE schools	% of schools teaching CE	Number of schools teaching CE
	Ukrainian Orthodox Church	Orthodox Church of Ukraine	Ukrainian Greek Catholic Church	Roman Catholic Church	Church of Evangelical Christian Baptists	Church of Christians of the Evangelical Church	Other Christians of the Evangelical faith	Seventh-day Adventists Church	Total CC (the most common)	Place by number of CC				
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Ivano-Frankivsk	1442	33	487	714	36	33	42	3	22	1370	X	I	95%	631
Lviv	3286	70	934	1649	174	87	108	14	29	3065	I	II	84%	992
Terнопil	1843	96	608	839	100	20	116	9	13	1801	IV	III	78,7%	542

Chernivitsi	1381	443	218	30	36	173	113	55	103	1171	XIII	IV	72%	406
Volyn	1683	590	539	27	30	133	222	2	46	1589	VI	V	66%	390
Kharkiv	1043	383	80	14	19	103	33	51	37	720	XXI	VI	53%	357
Rivne	1636	612	443	12	18	128	292	13	24	1542	VIII	VII	50%	292
Zakarpattia	2011	670	100	474	102	81	54	19	52	1552	VII	VIII	37%	223
Sumy	545	343	97	2	1	21	20	0	3	487	XXV	IX	19%	86
Cherkasy	1448	569	321	8	8	190	46	21	82	1245	XI	X	15,7%	84
Khmelnitsky	2070	947	401	82	152	168	69	74	43	1936	III	XI	14,3%	87
Donetsk	1876	782	119	45	14	142	41	21	49	1213	XII	XII	13%	66
Mykolajiv	807	293	159	11	11	66	48	8	25	621	XXIV	XIII	12,6%	60
Chernihiv	1016	587	156	5	5	75	38	12	30	908	XVII	XIV	12,3%	57
Poltava	1194	499	243	13	7	83	71	35	48	999	XVI	XV	12%	69
Vinnitsia	2244	1017	422	25	141	155	42	105	105	2012	II	XVI	11,4%	88
Dnipropetrovsk	1540	652	224	15	10	97	67	69	48	1182	XIV	XVII	9,5%	80
Kherson	990	379	153	32	18	90	33	13	22	740	XX	XVIII	9%	35
Kirovohrad	745	295	123	7	5	95	35	42	23	625	XXIII	IXX	7,7%	24
Kyiv city	1314	319	225	26	28	71	41	58	24	792	IXX	XX	6%	24
Zhytomyr	1622	653	329	24	143	120	73	79	35	1456	IX	XXI	5%	31
Kyiv	1914	748	493	28	29	168	56	76	53	1651	V	XXI	5%	34
Zaporizhia	1142	384	131	25	13	139	43	33	35	803	XVIII	XXII	4,2%	22
Luhansk	869	436	39	10	1	87	15	16	40	644	XXII	XXIII	3%	7
Odesa	1388	606	144	27	31	164	51	53	47	1123	XV	XXIV	2,7%	21
TOTAL	37049	12406	7188	4144	1132	2689	1784	881	1038	31262			31,7%	4708

traditions of religious life. Thirdly, the activity of Churches in the multi-religious Western regions of the country, associated with the defense of confessional interests, and territorial proximity to countries where the Roman Catholic Church has a widespread influence with its established state educational standards. However, these conclusions are somewhat corrected by the Kharkiv region, where the predominantly mono-confessional population (UOC-MP), lack of experience in teaching; however, there is a decision of local governments on the widespread introduction of religious-oriented courses. Thus, we see an effective fourth component – the political will of local authorities, which has become strongly relevant in the context of decentralization with the adoption in 2014 of the Concept of local government reform and territorial organization of government in Ukraine. However, as we can see, some regions (mostly in the east) of Ukraine in terms of dissemination of religious and ethical courses resemble “another country”, where it has not been possible to significantly increase the number of schools where teaching takes place since 2005. This is clearly evidenced by Table 1.<sup>24</sup>

Despite the fact that the table summarizes the data on 01/01/2021 (later statistics, the State Service of Ukraine on Ethnopolitics and Freedom of Conscience with Protestant Churches, unfortunately, didn't cover), these figures reflect the general state of implementation of religious and ethical education, which was discussed repeatedly at various conferences, round tables, meetings, etc.

The table in orange indicates the areas where the teaching of Christian ethics is supported by local authorities, i.e. the use of administrative resources, which shows the percentage of school coverage: from 50 % to 95%.

As for the influence of historical Churches, they have to assess the situation and undergo several changes in order to moderate the large-scale introduction of religious and ethical courses in public schools.

This requires:

- leadership and authoritative position of Church leaders and their benevolent persistence in this matter;
- training of competent teachers at the modern theological-scientific, social, cultural level. Despite all the exaggerated successes of theological education (both public and private), unfortunately, it was not possible to form a new creative generation of teachers who would

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<sup>24</sup> Data from (column 14, 15) *Religion. Statistical materials*, in: State Service of Ukraine for Ethnopolitics and Freedom of Conscience, <https://dessa.gov.ua/statistics-rel/> (20.01.2023).

make a breakthrough in the theory and practice of religious education in public schools;

- preparation of modern educational and methodical support of the educational process in cooperation of researchers-theorists from science with far-sighted Heads of educational institutions and their creative pedagogical staff;
- a timely and adequate response to the challenges of the post-Christian world addressed to Churches, not so much as a threat as a question – how willing followers of Christ are to sacrifice pride to their beloved past, their glorious traditions and familiar methods to return to a rapidly changing society and dare to present a new modern presentation of their traditional values.

Alongside the process of introducing religious and moral subjects into the secular education system, Churches and religious organizations raised the question of the possibility of establishing the latest educational institutions of different levels of accreditation at the level of secular educational institutions.

The law was adopted, and on July 2, 2015, the President of Ukraine signed the Law of Ukraine “On Amendments to Certain Laws of Ukraine on the Establishment of Religious Organizations by Religious Organizations”, permitting religious organizations the right to establish not only religious, but also general educational institutions. The adopted law became an important step in the process of decommunization of Ukrainian education and a very fundamental event in ensuring freedom of conscience in Ukraine. The right to establish general education institutions, which is granted to religious organizations, means that the legislator has put an end to a unique situation in Europe: there is no country in the European Union that forbids churches from opening public schools and universities.

However, there are still religious educational institutions in Ukraine that have not yet been recognized by the state, despite the announced process of decommunization, even with the adoption of a progressive law that gives religious organizations the right to establish educational institutions. This is due to the following:

- „religious educational institutions operate only in the private sector;
- private religious educational institutions do not have the right to receive the same access to communal premises as general educational communal educational institutions, although they comply with the legislation of Ukraine and the necessary quality in fulfilling state educational standards;

- state funding (subvention), as well as funding from local budgets, are also absent;
- in general, the education system in Ukraine does not ensure the development of diversity of educational institutions, freedom of choice and fair competition in education, which is a guarantee of a democratic state governed by the rule of law.

#### 4. Conclusions

The specificity of Ukrainian religious education in public schools, among the experience of other European countries, is the study of the ethical principles of the Christian religion. Coverage of all administrative-territorial centers of Ukraine in the context of teaching religious subjects, took place during the thirty years from 1992 to 2022. Since the introduction of religious subjects, support from state institutions has been regional in nature, mainly in the western regions of Ukraine. The lack of a holistic state vision of the strategy of religious and ethical education in Ukraine has led to the fragmentation and spontaneity of this process, the intervention of various political, social and religious institutions. It is obvious that ensuring the upbringing of the younger generation on religious moral principles, which for centuries have been sources of formation of the Ukrainian nation and Ukrainian culture, requires joint efforts of national and regional authorities, all participants in the educational process, religious organizations and the general public, as in the public school, it is an accentuated request for a world-view search for the Truth in a growing personality. For a further effective model of cooperation between religious and state institutions, in the context of the presence of a religious component in secular education, it is necessary to leave the teaching of religious and moral subjects on an optional basis, where there is no state provision for invariant teaching, and provide not only *de jure*, but also the *de facto* possibility for religious organizations to establish educational institutions of different levels of accreditation according to the state standard.

Prospects for further research may involve scientific research in the context of search for the reasons for the too-slow, if not artificially restrained, spread of elements of religious education in the secular school, deserves a separate study. As also necessary are comparative studies of the introduction of a religious cluster of education in public schools of Ukraine and in educational institutions



of other countries of the post-Soviet and European space, in order to find a more harmonious model of religious education in secular public schools.

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## The family in dialogue with God

### Abstract

Marriage and family are a remarkable truth of human person and his community; a *communio personarum*. In the New Covenant, marriage and the family took on, aside the interhuman and natural dimensions, a relation and dialogue with God in Jesus Christ and in the power of the Holy Spirit. The family, as the fundamental cell of social life, possesses its place, duties, and purpose in the community of the Church. The Christian family as a domestic Church, is the natural and fundamental school of faith. The reception by Christian of the sacrament of marriage signifies a radical alteration in their life, their path to salvation, their dialogue with God. The sacrament of marriage is the source of the spiritual life both for the spouses and for the family as for it imparts its supernatural spiritual unity and makes it a divine institution. The truth is the foundation of marital and family dialogue with God. The family stands as the domestic Church and is present, at once creatively and dynamically, in the universal Church. On the way to holiness the family undertakes a prophetic, priestly, and royal mission.

### Keywords

family, sacrament, domestic Church, holiness, marriage, dialogue

## 1. Introduction

The abundant variety of directions the human, as well as Christian vocation may take, most frequently assumes the form of marriage and family life. In relation to God, a particularly interesting category is dialogue. The analysis of the vision of the family as a domestic Church, with the indication of the prophetic, priestly and royal mission, cannot be omitted here either. This is a path to the realization of one's own humanity in the natural sense, while for the baptized it is the way to holiness. In the dynamics of the process of striving for holiness, it is necessary to point especially to the Eucharist and prayer, both of an individual and of the community, even communal.

It is also an intensely interesting sign of faith, hope and love with respect to God and neighbor, as well as to oneself.<sup>1</sup> Marriage and family are, moreover, a remarkable truth of the human person and his community, quite simply, a “*communio personarum*.”<sup>2</sup> In the entirety of the reflection, must be emphasized a personal aspect of the family as a community in its dialogue with the personal God.

## 2. The sacramentality of marriage – the basis of the family

In the New Covenant, marriage and the family took on, aside the interhuman and natural dimensions, a relation and dialogue with God in Jesus Christ and in the powers of the Holy Spirit. It is a matter of a dialogue which is the transcendental reflection of the dialogue among the persons of the Blessed Trinity and also a salvific dialogue of God with man in the Old Testament, as of Jesus Christ in the New Covenant, which constitute the successive phases of the history of salvation. God initiated a dialogue with man by means of revelation, to which man responds with religious faith, remaining himself in his proper mode of thinking and reacting. The eternal dialogue of the Word of God with God the Father found its maximal “carnal” expression in Jesus Christ.

The marital Covenant, through which man and woman form between themselves a community of their totality of life, finds its strength in the procreative

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<sup>1</sup> A. F. Dziuba, *Być świadkiem*, “*Collectanea Theologica*” 72(2002), no. 4, pp. 105–122.

<sup>2</sup> *Stolica Apostolska, Karta Praw Rodziny*, Città del Vaticano 1983, preambula.

act, but for the baptized it was raised by Christ to the dignity of a sacrament.<sup>3</sup> Furthermore, in itself, marriage places the spouses in the presence of a creative dialogue with God. The sacramental dignity of marriage is recognized by the Church in her awareness of the mind of Christ, and particularly in his dialoguing approach to man. The moment in which marriage was exalted to the dignity of an effective sign of grace was the paschal mystery of Christ itself, the fullest expression of His giving of Himself to His Spouse, the Church.<sup>4</sup>

The sacramentality of marriage is not something simply added onto marriage.<sup>5</sup> What is more, marriage itself is the sacrament insofar as within it one lives in the perspective of faith in Christ and in creative union and dialogue with Him. The marital community of life and love becomes an effective sign of Christ's union with His Church.<sup>6</sup>

By the will of Christ, the very act of contracting a marriage bond between two baptized persons becomes a sacrament. The sacramentality of marriage also has a Christological and ecclesiological significance.<sup>7</sup> Marriage is a recognizable sign of grace: the visibility of its sign is expressed adequately by the fact that here it is concerned with a marriage bond. A marital union without an external emphatic expression of the internal decision will be ineffective, for in the very nature of the union contracted there is the element of its self-evidence, and also a sacred sign directly concerned with holiness and sanctifying grace. This direction of a dialogue with sacramentality, holiness and the permanence of the marital bond ought to fill the heart of every man and woman living in marriage.

Through this sacrament, Christ confers upon the Christian family his assistance and care. This sacrament is a particular communitarian communion, a source of grace and holiness. In marriage Christ holds the place of primacy and endows it with a sacral and sacramental dignity. Ultimately, it is one of the sacraments instituted by Christ the Lord for the sanctification of man and woman

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<sup>3</sup> Jan Paweł II, *Encyklika "Redemptor hominis"*, Città del Vaticano 1979, no. 10.

<sup>4</sup> P. Adnes, *Le mariage. Le mystère chrétien. Théologie sacramentaire*, Tournai 1963, pp. 140–141.

<sup>5</sup> S. Czerwik, *Najnowsze wypowiedzi magisterium Kościoła o sakramentach*, "Ateneum Kapłańskie" 56 (1965), no. 334, pp. 287–293; B. Przybylski, *Teologia sakramentów*, "Ateneum Kapłańskie" 56 (1964), no. 334, pp. 260–268.

<sup>6</sup> Paweł VI, *Encyklika "Humanae vitae"*, Città del Vaticano 1968, no. 8.

<sup>7</sup> K. Wojacek, *Sakramentalność małżeństwa jako podstawa organizacji duszpasterstwa małżeństw*, "Roczniki Teologiczno-Kanoniczne" 1990, vol. 37, no. 6, pp. 17–18; Cz. Bartnik, *Sakrament małżeństwa*, "Roczniki Teologiczno-Kanoniczne" 37(1990), no. 2, pp. 101–108.

living in the community of marriage and the family. The Church is responsible for this particular community.<sup>8</sup>

### 3. The family as a domestic Church

The family, as the fundamental cell of social life, possesses its place, duties, and purpose in the community of the Church.<sup>9</sup> This union is not merely external and accidental. Simply put, the Christian family is a symbol and compendium of the universal Church. And, moreover, is founded on the same rock. Therefore, this, as it were, miniature Church, closed within its domestic walls, thrives along with the great Church at-large and develops with her. The Church is to be found wherever the baptized gather in the Name of Lord and persevere with Him in a dialogue of love, and more so when they are united with themselves in a sacramental marriage and in the family. The family, by its very nature, enters the created order, but only faith and the sacrament of marriage elevate it to the salvific level on which are to be found the ecclesial roots of the family as well as its openness to dialogue with God.

The Church gives birth to, educates and builds the Christian family, fulfilling in its behalf the saving mission entrusted to her by Jesus Christ. The Church preaches the Word of God which reveals to the family its Christian identity, that which it is and ought to be, in keeping with the plan of the Creator and always remaining open to it. The Church confers the sacrament through which the family is enriched and strengthened with the grace of Christ so as to sanctify it to the glory of the Father.<sup>10</sup> The Church preaches the new commandment of love through which the family is called and inspired to the service of love, that it might imitate and experience that same love, dedication and sacrifice,

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<sup>8</sup> J. Grzeškowiak, *Misterium małżeństwa. Sakrament małżeństwa jako symbol przymierza Boga z ludźmi*, Poznań 1993, pp. 15–19; J. Kłys, *Małżeństwo drogą do świętości*, in: F. Adamski (ed.), *Miłość – małżeństwo – rodzina*, Kraków 1985, pp. 139–182.

<sup>9</sup> Jan Paweł II, *Adhortacja apostolska "Christifideles laici"*, Città del Vaticano 1988, no. 40; M. Marczewski, *Małżeństwo w świetle współczesnego rozumienia Kościoła*, "Zeszyty Naukowe KUL" 18 (1975), no. 4, pp. 15–26; J. Mariański, *Nauczanie Jana Pawła II o rodzinie a przemiany społeczno-moralne w Polsce*, "Ethos" (2004), no. 67–68, pp. 161–182.

<sup>10</sup> Jan Paweł II, *Adhortacja apostolska "Familiaris consortio"*, Città del Vaticano 1981, no. 49; B. Mierzwiński, *Elementy teologii praktycznej małżeństwa i rodziny*, in: K. Majdański (ed.), *Teologia małżeństwa i rodziny*, vol. 1, Warszawa 1980, pp. 157–277.

which Christ offers to all mankind. On the other hand, the Christian family is in the Church and participates in her salvific mission, and itself makes manifest and real the body of the Church, possessing in her its own proper duties and purposes.

The Church appreciates the value of the family “for itself”. Nevertheless, one must not forget that the domestic church is not merely a microcosm of the universal Church. The title of domestic church is applied to the community of marriage and family chiefly because it is a specific focus for the realization of the fundamental functions of the Church, through which the Church itself realizes itself, thus becoming a sign of Christ in the world.<sup>11</sup> The Church is realized and builds up herself through the fulfillment of those functions and missions, which Christ fulfilled, namely, those we term, prophetic, priestly, and royal.<sup>12</sup>

Christian spouses, grafted onto Christ by the sacrament of Baptism – onto Christ who is Prophet, Priest, and King – and by the power of the sacrament of marriage, included as a twofold unity in the spousal bond of Christ with His Church, are in a specific manner duly entitled and obliged to fulfill the functions proper to the whole Church.<sup>13</sup> The spouses attain salvation in their own community through a dialoguing realization of Christ’s threefold mission. In realizing the prophetic, priestly, and royal mission in their family circle, they contribute to their and their children’s salvation, as well as the salvation of others.

Christian spouses and parents become, first of all, prophets to each other mutually and to their children and to the society in which they live. Above all else, the prophetic mission requires of Christian spouses and parents, an obedience in faith, of which a peerless example is Abraham.<sup>14</sup> The sacrament of marriage presupposes and demands the existence of faith, hence, in practice, an openness

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<sup>11</sup> *Familiaris consortio* 49; B. Czapliński, *Przemówienie w Radio Watykańskim (11.11.1963). Troska społeczeństwa chrześcijańskiego o powołania kapłańskie*, “Orędownik Diecezji Chełmińskiej” 14 (1963), no. 11–12, p. 267; M. Żurowski, *Rodzina “Kościołem domowym”*, “Chrześcijanin w świecie” 10 (1978), no. 12, pp. 44–70.

<sup>12</sup> J. Laskowski, *Małżeństwo i rodzina w świetle nauki Soboru Watykańskiego II*, Warszawa 1982, pp. 267–277.

<sup>13</sup> *Familiaris consortio* 56.

<sup>14</sup> Jan Paweł II, *Encyklika “Redemptoris Mater”*, Città del Vaticano 1987, no. 14; A. F. Dziuba, *Dynamika wiary*, Częstochowa 1997, pp. 21–37; J. K. Nagórny, *Teologiczna interpretacja moralności Nowego Przymierza*, Lublin 1989, pp. 354–356; R. Schnackenburg, *Nauka moralna Nowego Testamentu*, Warszawa 1983, pp. 311–316.

to dialogue with God. The Christian family as a “domestic church” is the natural and fundamental school of faith.<sup>15</sup>

Jesus Christ, the Messiah sent by the Father, became the one and eternal Archpriest of the New Covenant.<sup>16</sup> The Church participates in the priesthood of Christ. The priestly dignity assigns the family a special place in the Church. It is an autonomous place which no one else can assume or occupy.<sup>17</sup>

The priesthood of the Christian family differs in essence from the hierarchical priesthood.<sup>18</sup> In other words, participation in the priesthood of Christ is accomplished in a different manner and is directed in its duties in a way which is different from the ministerial priesthood, although its dialoguing reference to Christ is similar. The assigned role of the ministerial priesthood with respect to the priesthood of the family is expressed chiefly through service, including an openness to God. It is a particular accompanying of the family on its path in this world through the administration of the sacraments and prayer, the preaching the Word of God, and the example of evangelical witness of life, to the end that the family finds in priests the directors and teachers of life.<sup>19</sup>

The royal function of the family, its participation in the regality of Christ and the Church, depends on an attitude of service with respect to members of the family and to everyone else, to various strata of society and to all creation, in an openness to dialogue. This attitude is inspired by the dialogue of the Spirit of Jesus Christ, poured out on the hearts of members of the family by the Baptism of water and the Spirit.<sup>20</sup> It is a service of a dialoguing openness

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<sup>15</sup> *Familiaris consortio* 86; R. Laurentin, *La famiglia di Nazaret: il suo segreto*, in: A. S. Panimolle (ed.), *Famiglia*, Bologna 1986, pp. 109–120.

<sup>16</sup> *Lumen Gentium* 5, 21; *Presbiteriorum ordinis* 1, 2, 12, 13; *Katechizm Kościoła Katolickiego* 1544–1545; *Gaudium et spes* 22; Jan Paweł II, *Dar i tajemnica*, Kraków 1996, passim; A. Vanhoye, *La nuova alleanza nel Nuovo Testamento*, Roma 1984, pp. 647–650.

<sup>17</sup> *Familiaris consortio* 36; E. Ozorowski, *Kapłaństwo małżonków i rodzin*, in: E. Ozorowski (ed.), *Słownik małżeństwa i rodziny*, Warszawa Łomianki 1999, p. 182.

<sup>18</sup> Jan Paweł II, *List do rodzin “Gratissimam sane” z okazji Roku Rodziny*, Città del Vaticano 1994, no. 6, 7; *Gaudium et spes* 24; *Katechizm Kościoła Katolickiego* 2205.

<sup>19</sup> *Lumen Gentium* 10; *Gaudium et spes* 10; *Familiaris consortio* 64; M. Lena, *Chrześcijańskie wychowanie powołania*, in: B. Bejze (ed.), *Religia w życiu społecznym*, Warszawa 1995, pp. 240–256.

<sup>20</sup> Jan Paweł II, *Encyklika “Dominum et vivificantem”*, Città del Vaticano 1986, no. 56; *Presbiteriorum ordinis* 1; G. Helewa, *Alleanza nuova nel Cristo Gesù*, “Rivista di vita spirituale” 1976, vol. 30, pp. 5–31.



toward all people, in keeping with what Christ did and commanded his disciples to do.<sup>21</sup>

The best school of interhuman love is marriage and the family, for they are to teach man true and natural love, that is, the sacrifice of self for the good of the loved one, liberating the spirit from the natural inclination to egoism and the egocentric vision of only oneself.<sup>22</sup> Along the path of everyday life, love in marriage and the family leads to growth and development, passing through various phases and being manifested in seeking for the good of another, while at the same time, giving to the other all that which is to be found in self-sacrifice.<sup>23</sup>

#### 4. The family as a community of holiness

The reception of the sacrament of marriage by the Christian, signifies a radical alteration in their life, their path to salvation, their dialogue with God. Hitherto they strove for salvation individually. From their wedding day onward they will be mutually responsible for their salvation.<sup>24</sup> Marriage, as a sacrament, is a special vocation to live in love and in a community of two, and successively, in a community increased by progeny; a life that constitutes a special participation in the realization of the divine plan of creative love. The family is the fundamental school of a life that is religious, hence a lifegiving openness to God. The family is a school of characters, capable of sacrificial love, and above all, directed to holiness which is the fruit of dialogue with God.<sup>25</sup>

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<sup>21</sup> A. F. Dziuba, *Miłość*, in: J. Nagórny, K. Jeżyna (eds.), Jan Paweł II. *Encyklopedia Nauczania Moralnego*, Radom 2005, pp. 327–333.

<sup>22</sup> Jan Paweł II, *Ojcostwo i macierzyństwo w zamysle Bożym. Przemówienie do uczestników Tygodnia Studiów nad małżeństwem i rodziną* (27.08.1999, "L'Osservatore Romano" 1999, vol. 20, no. 11, pp. 11–13; *Gaudium met spes* 48.

<sup>23</sup> *Familiaris consortio* 43; *Stolica Apostolska, Karta Praw Rodziny* 7; Jan Paweł II, *Encyklika "Laborem exercens"*, Città del Vaticano 1981, no. 10, 25; Benedykt XVI, *Przemówienie do pierwszej grupy Biskupów polskich. Problem chrześcijańskiego wychowania* (26.11.2005), in: Benedykt XVI do Polskich biskupów. *Przemówienia wygłoszone z okazji wizyty "ad limina Apostolorum"*, Poznań 2005, pp. 5–9; *Gaudium et spes* 61.

<sup>24</sup> *Gaudium et spes* 48; W. Skrzydlewski, *Chrześcijańska wizja miłości, małżeństwa i rodziny*, Kraków 1982, pp. 121–126; A. F. Dziuba, *Spowiedź małżeńska. Życie małżeńskie a sakramentalna posługa pokuty i pojednania (Zagadnienia wybrane)*, Kraków 2002, pp. 13–33.

<sup>25</sup> *Lumen Gentium* 32; Jan Paweł II, *List apostolski "Novo millennio ineunte"*, Città del Vaticano 2001, no. 31; Benedykt XVI, *Przemówienie do drugiej grupy Biskupów polskich*.

The human being's sanctification is accomplished on the vertical and horizontal stage in a dialoguing openness.<sup>26</sup> This is carried out in relationship to God and the human community. It follows then, that the family will become a school of sacrificial love, a cradle of holiness, which reaches its earthly summit and apex in dialogue with God in Jesus Christ and the Holy Spirit.<sup>27</sup>

The source of the spiritual life of the spouses as well as of the of the family is the sacrament of marriage, for it imparts its supernatural spiritual unity and makes it a divine institution.<sup>28</sup> The Christian family, built on the sacrament of marriage as instituted by Christ, draws strength and help from this source, while the grace of this sacrament increases, empowers and reaffirms sanctifying grace, that particular sign that binds one to God.<sup>29</sup>

The sacrament of marriage is joined with the Eucharist in an external liturgical ritual, but that is not all, for the Eucharist deepens its sacramental character, for it is the very source of Christian marriage.<sup>30</sup> The interior bond of marriage and the Eucharist are manifested as a covenant, a community of dialogue and mission.<sup>31</sup> The Eucharist and the sacrament of marriage celebrate each in its own way the mystery of nuptial espousal – espousals with Christ and Christ with His Church in the commemoration of the Eucharistic sacrifice and the sacramental nuptials of Christian spouses. The mystery of Christ's espousal with the Church is consummated in the Paschal mystery and made present in the Eucharist. The

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*Odważna troska o zachowanie katolickiej i narodowej tożsamości*, 3.12.2005, in: *Benedykt XVI do Polskich biskupów*, pp. 21–23; L. Pawlak, *Biblijne podstawy duchowości rodziny w adhortacji apostolskiej "Familiaris consortio"*, "Sprawy Rodziny" (2002), no. 10, pp. 49–54; S. Bolero, *Per una teologia della familia*, Roma 1992, pp. 18–48.

<sup>26</sup> J. Buxakowski, *Refleksje teologiczne nad celem duszpasterstwa rodzin*, "Studia Pelplińskie" 1973, vol. 3, pp. 204–208; S. Witek, *Teologia życia duchowego*, Lublin 1986, pp. 218–220.

<sup>27</sup> *Gaudium et spes* 48; Jan Paweł II, *Encyklika "Veritatis splendor"*, Città del Vaticano 1993, no. 107; *Familiaris consortio* 3; J. Salij, *Małżeństwo jako udział w Paschalnym Misterium Chrystusa*, "Ateneum Kapłańskie" 75(1978), no. 369, pp. 17–28.

<sup>28</sup> *Dei Verbum* 21; *Apostolicam actuositatem* 11; *List do rodzin* 18.

<sup>29</sup> *Katechizm Kościoła Katolickiego* 1664; *List do rodzin* 7; Jan Paweł II, *Encyklika "Evangelium vitae"*, Città del Vaticano 1995, no. 43.

<sup>30</sup> *Sacrosanctum Concilium* 78; Jan Paweł II, *Encyklika "Ecclesia de Eucharistia"*, Città del Vaticano 2003, no. 34; A. Scola, *Il mistero nunziale. Matrimonio e familia*, Roma 2000, pp. 155–168.

<sup>31</sup> *Katechizm Kościoła Katolickiego* 1324; *Lumen Gentium* 11; *Gaudium et spes* 48; *Familiaris consortio* 57; E. Ozorowski, *Rodzina jako Kościół domowy*, in: K. Majdański (ed.), *Teologia małżeństwa i rodziny*, Warszawa 1990, vol. 2 pp. 41–49.

Eucharist and marriage are, moreover, together included in the Paschal mystery of Jesus Christ in a dialoguing manner.<sup>32</sup>

The Eucharist remains a mystery of faith, a sign of dialogue with God, thus requiring a humble submission and a firm adherence to Divine Revelation and its defense against rationalism.<sup>33</sup> The Paschal mystery fully permits us more expressly to take note of the dialoguing union of marriage and the family with the Eucharist that flows from the sacrificial character of both sacraments. Marital love cannot exist without sacrifice. Personal dedication in the daily family life is expressed in conscious personal dedication of self that embraces the totality of the spouses' lives. In the sacrifice of the Mass, man offers that which is most dear, he offers the gift of himself, of his freedom.<sup>34</sup>

The Eucharist plays a significant role in forming the family community and the children too. It should open itself in dialogue to others. It is important to indicate and demonstrate the unity of Holy Communion with the offering of Holy Mass, to introduce the child to the sacrifice of Christ the Lord and to teach the importance of small daily sacrifices. A child offering himself to the Father with the whole Church should unite with Christ's self-offering, bringing forward some gift, especially one linked to love of neighbor.<sup>35</sup>

The family fulfills its priestly mission not only in the celebration of the Eucharist and the other sacraments and personal sacrifice offered to God's glory, but also by a life of prayer, and by a prayerful dialogue with the Father through Jesus Christ in the Holy Spirit.<sup>36</sup> Prayer is that dimension which introduces truth into the home, thus making it possible for all members of the family to sense a fraternal bond in begging God's forgive-ness for their respective failings,

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<sup>32</sup> *Presbiteriorum ordinis* 5; *Ecclesia de Eucharistia* 1, 13; *Redemptor hominis* 20.

<sup>33</sup> *Katechizm Kościoła Katolickiego* 1322,1374; J. Krasieński, *Przez wiarę i nadzieję ku cywilizacji miłości*, Sandomierz 1987, pp. 453–472; A. Hiebert, *The Foundations of Paul's Ethics*, in: J. Gaffney (ed.), *Essays in Morality and Ethics*. The Annual Publication of the College Theology Society, New York 1980, pp. 53–56.

<sup>34</sup> Benedykt XVI, *Encyklika "Deus caritas est"*, Città del Vaticano 2004, no. 14; *Veriatis splendor* 4; J. Salij, *Małżeństwo jako udział w Paschalnym Misterium Chrystusa*, pp. 17–29.

<sup>35</sup> Jan Paweł II, *List apostolski "Dominicae cenae"*, Città del Vaticano 1980, no. 5; *Gravissimum educationis* 3; B. Mierzwiński, *Formy Duszpasterstwa rodzin*, in: E. Szczotok, A. Lisowska (eds.), *Komisja Episkopatu Polski Duszpasterstwa Ogólnego, Ewangelizacja wspólnoty małżeńskiej i rodzinnej. Program duszpasterski na rok 1993/1994*, Katowice 1993, pp. 403–416.

<sup>36</sup> *Lumen Gentium* 10; Jan Paweł II, *Modlitwa we wspólnocie rodzinnej*. Rozważanie przed modlitwą Anioł Pański (12.10.1980), in: E. Weron, A. Jaroch (eds.), *Jan Paweł II, Nauczanie papieskie*, vol. 3,2 (1980), Poznań–Warszawa 1986, pp. 461–461.

attaining therefrom peace of heart. It is a dialogue of hope.<sup>37</sup> From personal prayer is born the common prayer of the spouses and, then, family prayer. In keeping with Jesus Christ's assurance, such prayer reaffirms His presence and strengthens the hope that our prayers may be heard, and that our thanks may be in the future given.<sup>38</sup>

The sense of the spouses' prayer and that of the entire family most profoundly expresses the description: "life of prayer", signifying that between prayer and life there exists a strict relationship. In such prayer is summarized all the wealth of Christian prayer, especially adoration, making us aware that at times it is difficult for us to decipher that which God wants of us. In summary, this stable, dialoguing contact with God, forms the personality and lifestyle of the community of the spouses and the entire Christian family. Prayer prepares them to become masters of the spiritual life in their family.<sup>39</sup>

The process of educating family members to prayer is founded on positive experiences of prayer by the individual members of the family, especially by the children.<sup>40</sup>

A child reacts to prayer in his own way and according to his own reasoning and will come to accept and embrace the great divine mysteries. In a prayerful climate a child is capable of experiencing even more profoundly than an adult person the presence of God in his life, then enter into dialogue with Him. Seeing his parents praying, a child may not yet know the words of prayer and understand them, but he will imitate his parents in what they are doing, and this will be his own dialogue with God.<sup>41</sup>

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<sup>37</sup> *Gaudium et spes* 52; *Benedykt XVI, Przemówienie do trzeciej grupy Biskupów polskich. Od parafii do wolontariatu – laikat gotowy śpieszyć z pomocą potrzebującym, gdziekolwiek się znajdują* (17.12.2005), in: *Benedykt XVI do Biskupów polskich*, p. 33; J. Alfaro, *Chrześcijańska nadzieja i wyzwolenie człowieka*, Warszawa 1975, pp. 19–39; A. F. Dziuba, *Nadzieja*, in: J. Nagórny, K. Jeżyna (eds.), *Jan Paweł II, Encyklopedia Nauczania Moralnego*, pp. 342–348.

<sup>38</sup> *Familiaris consortio* 62; *Katechizm Kościoła Katolickiego* 2565; *Apostolicam actuositatem* 4; *Novo millennio ineunte* 43; Jan Paweł II, *Msza św. dla ludzi pracy na Zaspie* (12.06.1987), in: *Jan Paweł II w Polsce 2–10.VI.1979; 16–23.VI.1983; 8–14.VI.1987. Przemówienia i homilie*, Warszawa 1981, pp. 655–662.

<sup>39</sup> *Gaudium et spes* 50, 78; Jan Paweł II. *Encyklika "Dives in misericordia"*, Città del Vaticano 1980, no. 15; *Familiaris consortio* 59–62; I. Werbiński, *Modlitwa rodzinna*, in: E. Ozorowski (ed.), *Słownik małżeństwa i rodziny*, pp. 279–281.

<sup>40</sup> *Familiaris consortio* 60.

<sup>41</sup> Jan Paweł II, *Przekroczyć próg nadziei*, Lublin 1995, pp. 100–102; *Familiaris consortio* 55, 74.

## 5. Conclusion

The correct dynamic of discernment of the family places it as the most fundamental structure of social life. It needs to be strongly underlined also from the anthropological point of view. It is the sign of the natural building of human relationships, in this instance the relationship between a man and a woman, united in a permanent and stable bond, which Christ raised to the dignity of a sacrament. This sacrament is a particular expression of the dialogue between spouses and then parents with God and God with them. This truth is the foundation of marital and family dialogue with God.

The family stands as the domestic church, at once creatively and dynamically present in the universal Church. This category of “ecclesiality” is very important in the correct view of the Christian family. It is important as it assumes prophetic, priestly, and royal mission. Such are the particular notes of its dialogue with God, which in their specificity place the family in a special relation to God and its members to each other. Thus understood, it is a particular focus of sanctification. Together then, marriage and family are the foundation of a “**communio personarum**”, marked by an emphatic relation to the Eucharist and to prayer.<sup>42</sup> The proposed analyses clearly show that the category of dialogue in relation to the relationship of the family with God is an important theological and anthropological factor.

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<sup>42</sup> K. Wojtyła, *Rodzina jako “communio personarum” – Próba interpretacji*, “Ateneum Kapłańskie” 37 (1974), no. 6, pp. 17–28.

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## Christian Spiritual Formation towards Holiness

### Abstract

Freedom is one of the most fervently fought for values and, at the same time, the very idea of freedom belongs to concepts that are essentially contested. This situation is a part of human brokenness, and in Christian formation, it has to be seriously dealt with. According to the popular view, 'holiness' is a life-negating and judgmental attitude towards everything 'normal.' In biblical usage, it connotes belonging to God as a gift in Christ. Spiritual formation begins with a biblical explanation of freedom and holiness. A Christian worldview has to be the background to Christian formation, functioning as a correction of the commonly-accepted naturalistic worldview. A personal experiential relationship with God is the key to successful growth towards realistic and practical holiness in daily life. 'Dos and don'ts' that usually arise at the beginning of religious education shall be experienced as liberating instructions, if they are offered as guidance to a fully persuaded mind and a devotedly loving heart.

### Keywords

religious education, spiritual formation, brokenness, sin, liberty, holiness

## 1. Introduction

The authors of this paper follow steps borrowed from Thomas Manton, a 17<sup>th</sup> century English Puritan author. In his exposition of Psalm 119 he writes: “Knowledge, persuasion, affection, practice, these follow one another, where the faculties of the soul are rightly governed, and kept in a due subordination.”<sup>1</sup> His terminology will be adjusted in the following way: (1) ‘Knowledge’ will be replaced by ‘correcting definitions,’ (2) ‘persuasion’ will be replaced by ‘certainty of faith,’ (3) ‘affection’ will be replaced by ‘emotional attachment,’ and (4) ‘practice’ will be replaced by ‘commitment to action.’ These are used as subtitles and names of the steps in the formation towards holiness.

### 1.1. The Concept of Freedom

The concept of freedom has a long tradition in the history of philosophy. Many notions related to this concept are open for misinterpretation related to the notion of freedom and holiness that are a part of human brokenness. Religious education students will, most probably, be influenced by a simplified utilitarian understanding of freedom as described by J. S. Mill as “...the only purpose for which power can be rightfully exercised over any member of a civilized community, against his will, is to prevent harm to others.”<sup>2</sup> Although this understanding of freedom does not mean people are free from responsibilities, it permits actions that are contrary to a Christian understanding of holiness. For example, it allows various types of self-harming behaviour, or to hold and express any philosophical or religious views, as long as they do not involve force or harm applied against others.

On the deeper, philosophical level, liberty is explained as *autonomy*. The word comes from two Greek words: *autos*, meaning ‘self’ and *nomos*, meaning ‘law.’ Absolute human self-governing entails non-existence of any divine being. In Marx’ words, “The more man puts into God, the less he retains within himself.”<sup>3</sup>

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<sup>1</sup> Th. Manton, *Psalm 119, Vol. 1*. Edinburgh 1990, The Banner of Truth Trust, p. 325.

<sup>2</sup> J.S. Mill, *On Liberty*, New Haven 2003, Yale University Press, p. 80.

<sup>3</sup> K. Marx, *Early Writings*, Transl. Rodney Livingstone and Gregor Benton, London 1992, Penguin Books, p. 324.

In theology, it is hardly possible to find a more counter-intuitive notion than the New Testament concept of *freedom in Christ*. While a common understanding of freedom is *autonomy* or self-government independent from the law of God,<sup>4</sup> in the New Testament such an autonomous attitude is defined as 'sin.'<sup>5</sup> But if "everyone who commits sin is a slave to sin" (Jn 8:34), the autonomous idea of freedom must be enslaving. On the other hand, in the Bible, those who are freed from sin are made *slaves* of righteousness (Rom. 6:18). Apostle Paul often refers to himself as 'a slave of Christ' and although a slave is a freedman of the Lord, the free person is a slave of Christ (1 Cor. 7:22).<sup>6</sup>

How can something that is called 'slavery' be called 'freedom' at the same time? Does it not sound like some kind of Orwellian doubletalk? It is possible to avoid the problem by pointing out that the word 'slavery' here is used as a metaphor. That objection is true to the extent that the marks of this spiritual condition are very different from what is commonly referred to by that word. But even if it is a rhetorical device that thrives on ambiguity,<sup>7</sup> if the metaphor is to make sense, one attribute of its literal part will have to be inevitably transferred: the submission to an outward authority.

How can that which has been called "humanity's highest good"<sup>8</sup> be called 'slavery' at the same time? There are other words describing the relationship of believers with Christ. They are called 'friends' (Jn 15:15), the 'Bride of the Lamb' (Rev. 19:7), 'children' (Heb. 2:13), 'brothers' (Heb. 2:11) or 'sheep' (Jn 10). In the fifteenth chapter of the Gospel of John, Jesus expressly says he is not calling his disciples 'slaves' but 'friends.' Christ loves his disciples, and they are expected to love him with all their being. The notion of 'slavery to love' (*servitium amoris*) can be found in ancient literature.<sup>9</sup> Although in Greek and Latin

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<sup>4</sup> A philosophical description of autonomy can go like this: "I wish to be able to subject my motives, principles, and habits to critical examination, so that nothing moves me to action without my agreeing to it." Th. Nagel, *The View from Nowhere*, New York 1989, Oxford University Press, p. 119.

<sup>5</sup> ...sin is lawlessness (1 Jn 3:4).

<sup>6</sup> M.J. Harris, *Slave of Christ*, Downers Grove 1999, IVP Academic.

<sup>7</sup> It is for us to choose what to transfer from the literal to the nonliteral part of it. D.H. Aaron, *Biblical Ambiguities: Metaphor, Semantics and Divine Imagery*, Leiden 2001, Brill, 1.

<sup>8</sup> O. Höffe, *Critique of Freedom*, Transl. Nils F. Schott, Chicago 2020, The University of Chicago Press, ix.

<sup>9</sup> R. O. A. M. Lyne, *Servitium Amoris*, "The Classical Quarterly, New Series" 29/1 (1979), pp. 117–130.

poetry, the ‘love-slave’ is usually a romantic lover who is enslaved by his passion and may be degraded by it<sup>10</sup>; nevertheless, the imagery can be cautiously used as an example of the power of love. The teacher can refer students to the biblical *Song of Songs* or maybe to C. S. Lewis’ *The Four Loves*<sup>11</sup> in order to point out the differences between various types of loving attachment. Freedom in Christ is a free and complete loving submission to the Saviour.

## 1.2. The idea of holiness

The idea of holiness is, if possible, even more misunderstood than the idea of freedom. In the popular mind, it is almost always identified with prohibitions of all joys and good things that make life worth living. And it must be admitted that “[c]ulturally, holiness has sometimes gone hand in hand with arrogance or elitism.”<sup>12</sup>

In spiritual formation, a lot must be done to correct these popular sentiments, if holiness is to become genuinely desired as a life goal. Add to it the power of entertainment culture,<sup>13</sup> the looming problem of digital dementia<sup>14</sup> and the general atheisation of science and the task to make holiness desirable will seem next to impossible.

Despite all difficulties, guiding one’s students towards holiness is a non-negotiable task. Scripture states that humans have to strive for holiness, without which no one will see the Lord (Heb. 12:14). This ‘striving’ is not an effort to achieve salvation by works. That is freely given in Christ who is the believer’s sanctification (1 Cor. 1:30). As Calvin says, “When we hear mention of our union with God, let us remember that holiness must be its bond; not because we come into communion with him by virtue of our holiness! Rather, we ought first to cleave unto him so that, infused with his holiness, we may follow whither he calls.”<sup>15</sup>

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<sup>10</sup> Plato, *Symposium*, 183 A.

<sup>11</sup> C. S. Lewis, *The Four Loves*, New York 1960, Harcourt, Brace and Company.

<sup>12</sup> M. Allen, *Sanctification*, Grand Rapids 2017, Zondervan, p. 22.

<sup>13</sup> What Neil Postman says of television can be asserted of all media: “The problem is not that television presents us with entertaining subject matter but that all subject matter is presented as entertaining...” N. Postman, *Amusing Ourselves to Death*, London 1986, Penguin Books, p. 87.

<sup>14</sup> M. Spitzer, *Digitale Demenz*, München 2012, Droemer Verlag.

<sup>15</sup> J. Calvin, *J. Institutes of the Christian Religion*, Louisville 2006, Westminster John Knox Press, p. 686.

The starting point for the teaching and proper theological understanding of holiness is the holiness of God. Whether to begin with a simple definition of a concise theological dictionary, or with a more complex discussion of the topic in biblical languages and in systematic theology, it is advisable to point out and stress the dimension of its mystery. Humans cannot approach God as an object among other objects of knowledge. Rudolf Otto in the classic *The Idea of the Holy*, quotes German religious writer Gerhard Tersteegen who said “a God comprehended is no God.”<sup>16</sup> The holiness of God is much more than just moral excellence or human goodness augmented to infinity in a human sense.<sup>17</sup> First of all, ‘holiness’ is an attribute of God’s ontological *otherness* denoting the metaphysical gap between creature and Creator that both terrifies and fascinates us, it is both *mysterium tremendum* and *mysterium fascinans*, as described by Otto.

In the Bible, the readers are faced with the demand, “Be holy because I am holy” (Lev. 19:2; 1 Pet. 1:16). This commandment concerns not ontological but ethical holiness, and historical reactions to it have oscillated from legalism to antinomianism and from perfectionism to libertinism. An explanation of these deviations may be crucial to help religious education students; but it also can lead to fruitless scholastic dissection of theological theories. It is much more practical and more productive to stress the relational dimension of holiness that is hidden in the theological notion of the ‘union with Christ.’ It means that Christ “...lives and works in us, not speculatively but really, with presence and with power.”<sup>18</sup>

## 2. Rational certainty of faith

Liberty of thought and certainty in religious matters, without doubt, seem incompatible.<sup>19</sup> ‘Free thought,’ in a similar way as freedom, has been defined as *autonomous* thinking, or “...as the refusal to be controlled by any authority

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<sup>16</sup> R. Otto, *The Idea of the Holy*, London 1952, Oxford University Press, p. 25.

<sup>17</sup> D. Hume, *An Enquiry Concerning Human Understanding*, Oxford 2007, Oxford University Press, p. 14.

<sup>18</sup> M. Luther, *Commentary on Galatians*, 1535. Quoted in: J.V. Fesko, *Beyond Calvin*, Göttingen 2012, Vandenhoeck & Ruprecht, p. 129.

<sup>19</sup> A good introduction to the problematics is: H. Bavinck, *Certainty of Faith*. St., Catharines, 1980, Paideia Press.

but its own.”<sup>20</sup> On the contrary, religious certainty is too often based on authority that censors any dissent, or on a lack of critical thinking directed against the social ties that are its source.

Humanity’s quest for certainty has produced a bewildering number of religions, philosophies, and scientific theories. One result is scepticism, according to which the wise person refuses to commit oneself to any of these as the truth. Into this world of uncertainty, the words of Jesus sound “...you will know the truth and the truth will set you free” (Jn8:32) promising freedom from sin (Jn 8:34) based on knowledge of truth. How can such differences be reconciled?

In dealing with this problem, one must be careful not to deny religious education students the liberty of doubt and questioning. It is important to mention that absolute certainty for a finite mind is impossible. Paradoxically, it does not mean that religious certainty is impossible. It only means it is not based on rationally observed facts *only*. As Luther (quoted above) said, it is not just arguments but the *work* of the resurrected Christ that has to inwardly confirm the facts Christians provide in their teaching. Calvin states: “...we cannot possess the good things of our Lord Jesus Christ to take any profit from them, unless we first enjoy him. ...he [Christ] says, I am yours, possess ye me.”<sup>21</sup> In more modern terms, Emil Brunner says: “...in faith I do not think, but God leads me to think, he does not communicate ‘something’ to me, but ‘himself.’”<sup>22</sup>

Despite the limited possibilities of reason, and despite the fact that religious certainty is based on a spiritual encounter, in spiritual formation teachers cannot leave out the development of the Christian mind. This will be conducive to avoiding the development of fundamentalist narrow-minded views in matters that the Reformers referred to as ‘adiaphora’ or things that are ‘indifferent.’<sup>23</sup>

In our opinion, there are four theories and attitudes that hinder believers from developing a sound certainty of Christian faith. They are (1) scientism, (2) monism, (3) selfism, (4) evolutionism. These theories/attitudes choke enjoyment out of Christian liberty and obstruct growth towards practical holiness.

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<sup>20</sup> J.B. Bury, *A History of Freedom of Thought*, New York 1913, Henry Holt and Company, p. 18.

<sup>21</sup> J. Calvin, *John Calvin’s Sermons on Ephesians*, Edinburgh 1987, The Banner of Truth Trust, pp. 403-404.

<sup>22</sup> E. Brunner, *Truth as Encounter*, Philadelphia 1963, The Westminster Press, p. 114.

<sup>23</sup> J. Calvin, *Institutes of the Christian Religion I*, 2006, 3.19.16, p. 849.

Fighting these *negative* influences must be done with the *positive* picture of the Christian mind in the foreground.

### 2.1. Scientism and monism vs. freedom

‘Scientism’ is a derogatory word that describes an inordinate belief in the possibilities of science. An undisputed fact is that science (or rather scientists) did, and does, wonders by manipulating nature exploiting the so-called ‘natural laws.’ Although the heyday of belief in the bright future ushered by scientific discoveries is long over, solutions for this troubled world are still expected to be brought about by better science and certainly not by better ethics or religion.

Since the 17th century, the successes of science have greatly strengthened the doctrine of determinism, which despite the developments in modern physics (quantum theory, chaos theory), still hold the imagination of the popular mind. Determinism says that the universe can be explained, by laws of cause and effect.<sup>24</sup>

If this is the case, it obviously creates a problem for the idea of human freedom. It means that the ‘I’ of making free and independent rational decisions is just an illusion and human personality is effectively eradicated. Of course, this is a disputed theory (that, by the way, contradicts selfism). But teachers must not underestimate its damaging effects in situations where the student needs either *self-confidence* in relying on his/her individual free conscience, or has to take *responsibility* for his/her knowingly wrongful *free* action.

Scientism goes hand-in-hand with the worldview called ‘monism.’ There are several types of monism,<sup>25</sup> but for the purpose of this article, it is only important to see how the core idea of monism (that there is just one type of reality) excludes spirituality and the divine from the realm of being. The hope of monistic theory is that one super-science will swallow up all other sciences in its universal theory of everything.

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<sup>24</sup> Philosophies based on this idea offer impressive intricately thought-through systems. The problem is that they lose human freedom on the way. This is why F. H. Jacobi (in 1785) responded to Spinozism saying: “Every avenue of demonstration ends up in fatalism.” F.H. Jacobi, *The Main Philosophical Writings and the Novel Allwill*, Montreal 1994, McGill-Queen’s University Press, p. 234.

<sup>25</sup> D. Bielfeldt, *Monism*, in: W van Huyssteen (ed.), *Encyclopedia of Science and Religion*, New York 2003, Macmillan Reference USA, p. 582.

In the biblical worldview, there is a hierarchy of beings which is a key idea of worship. For the lack of a better word, I will use the term ‘dualism’, however, it must be stressed it is an asymmetrical dualism that does not jeopardize the unity of all existence under the sovereignty of God. The Biblical picture of the world suggests to us first of all, the ontological duality of uncreated and created beings (God and creation); secondly, the duality of spiritual and physical type of existence (humans being part of both); and thirdly, the ethical dualism of good and evil. The hierarchy of being provides the clue how to use human freedom: *worship* towards the uncreated being, *respect* towards created spiritual beings, *dominion* over the physical realm. Complexities of these relationships are treated in systematic theology. But it should be clear that scientific determinism does not apply in the spiritual and uncreated form of being.

## 2.2. Selfism and evolutionism vs. holiness

The next issue is the connection between selfism and holiness. The word ‘self’ may have several meanings. In pastoral care ‘the self’ has been used as a term denoting “the individual human being.”<sup>26</sup> In modern times it has become one of the central themes of philosophy, psychology and popular culture, where it has supplanted religion. Despite the scientific uncertainty “...whether such a thing as self even exists...”<sup>27</sup> bookstores are full of books with the word ‘self’ in their title. The word ‘selfism’ is often used as a synonym for ‘narcissism’ or ‘self-worship’. Its main manifestations are consumerism and pop-psychologies<sup>28</sup> offering all kinds of self-help and self-improvement guides. Self-consciousness, self-determination, self-expression, self-improvement, self-love, self-care, self-confidence etc. have become buzzwords of the ‘therapeutic culture.’<sup>29</sup> A good illustration of how self can be manipulated by media is a BBC documentary series *The Century of the Self* that Adam Curtis, released in 2002.

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<sup>26</sup> E.L. Johnson, *God and the Soul Care*, Downers Grove 2017, InterVarsity Press, p. 27.

<sup>27</sup> S. Gallagher, *Introduction, A Diversity of Selves, The Oxford Handbook of the Self*, Oxford 2011, Oxford University Press, p. 1.

<sup>28</sup> I.E. Catt, *Rhetoric and narcissism: A critique of ideological selfism*, “Western Journal of Speech Communication” 50/3 (1986), p. 242–253.

<sup>29</sup> “The therapeutic culture is defined as one in which the central moral question is individual fulfilment.” D.F. Piar, *A Welfare State of Civil Rights: The Triumph of the Therapeutic in American Constitutional Law* 2008, <http://scholarship.law.wm.edu/wmborj/vol16/iss3/2>.



All of this has serious consequences for the proper understanding of holiness. We have seen that Christian holiness is *relational*. In the Bible, holy things were offered to God and could not be utilized for any other purpose than the prescribed sacred purpose. A similar rule applied to Old Testament priests (though only temporarily for the performance of their priestly duties). In the New Testament, all believers are referred to as the ‘holy priesthood’ (1 Pet. 2:5). In spiritual formation, this idea of *belonging* to God and *exclusive use* in his service<sup>30</sup> must be thoroughly grasped and deeply owned if the onslaughts of selfism through secular education and media is to be successfully resisted.

There is hardly a more acerbic worldview debate than between evolutionists and creationists. This is probably because it is being fought not on purely religious grounds, but on the grounds of *science*. Evolutionism permeates all scientifically accepted thinking about life and ascribes god-like attributes of creativity to nature. There are various views of evolution<sup>31</sup>, some too complicated for certain levels of instruction. But the teachers can provide the student with some very basic ideas that demonstrate the contradictory nature of evolutionism.<sup>32</sup> In a nutshell, it is a belief that outcomes of all processes (natural, mental, social) are subject to the laws of evolution, which means they are governed as if ‘from below’ by properties inherent in the matter. These laws are general, a-moral, unavoidable, and their outcome is the ‘survival of the fittest.’ In spiritual formation, teachers have to view the world as governed from above. Although natural laws are the work of the Creator, his moral and spiritual laws must have precedence over them in the sense given in Christ’s answer to the devil “Man shall not live by bread alone, but by every word that comes from the mouth of God” (Mat. 4:4).

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<sup>30</sup> “We are not our own; therefore, as much as possible, let us forget ourselves and our own interests. Rather, we are God’s. Therefore, let us live and die to Him.” J. Calvin, *A Little Book on the Christian Life*, Orlando 2017: Reformation Trust Publishing, p. 18.

<sup>31</sup> E.g. theistic evolution, evolutionary creationism etc.

<sup>32</sup> For example, C. S. Lewis’ argument that we can “...never find the laws of Nature causing anything.” C.S. Lewis, *God in the Dock*, Grand Rapids 1970, Eerdmans, p. 77. He also quotes Professor Haldane saying: “If my mental processes are determined wholly by the motions of atoms in my brain, I have no reason to suppose that my beliefs are true.” C.S. Lewis, *Miracles*, Glasgow 1990, William Collins Sons & Co., p. 19.

Apologetics does not make saints out of humans, but it provides the mind with a viable alternative to the secular worldview. The mind has to be used to the full<sup>33</sup> if humans are to attain the goal set before us in Scripture.

### 3. Emotional attachment to the son of God

Christian formation cannot stop at cognitive certitude, but must go on from rational persuasion to spiritual communion with Jesus. Bonaventure, a medieval mystic, warns us that humans should not believe that, "...reading is sufficient without unction, speculation without devotion, investigation without wonder, observation without joy, work without piety, knowledge without love, understanding without humility endeavour without divine grace, reflection as a mirror without divinely inspired wisdom."<sup>34</sup> Bonaventure is referring to what is called spirituality today. But there are many different spiritualities on the market, many of them non-Christian, even atheistic.<sup>35</sup> Even in a Christian understanding of spirituality, there are differences: focus may be on spiritual disciplines, on ecstatic experiences, on its therapeutic effects, on the efficacy of the sacraments, on mystical perceptions etc. In the Reformed tradition, spirituality may be defined in the following way, "Spirituality is a human capacity for a relationship with God as revealed in Jesus Christ through the Spirit."<sup>36</sup> The key words are *relationship* and *God, Jesus, [the Holy] Spirit*. It is a Trinitarian definition that is focused on the revelation of God in Jesus and the realisation of a relationship with him through the Holy Spirit. Students need to 'know with their heart'<sup>37</sup> that "Jesus Christ is the object of everything, and the centre to which everything tends.

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<sup>33</sup> "...we have been endowed with reason and understanding so that, by leading a holy and upright life, we may press on to the appointed goal of blessed immortality." J. Calvin, *Institutes of the Christian Religion I*, 2006, p. 242.

<sup>34</sup> Bonaventure, *The Soul's Journey into God, The Tree of Life, The Life of St. Francis*, New York 1978, Paulist Press, pp. 55–56.

<sup>35</sup> For example: S. Antinoff, *Spiritual Atheism*, Berkeley 2009, Counterpoint.

<sup>36</sup> B. Johnson, *Spiritual Direction in the Reformed Tradition*, in: G.W. Moon and D.G. Benner, *Spiritual Direction and the Care of Souls: A Guide to Christian Approaches and Practices*, Downers Grove 2004, InterVarsity Press, p. 97.

<sup>37</sup> We know the truth not only by means of the reason but also by means of the heart.\* It is through the heart that we know the first principles, and reason which has no part in this knowledge vainly tries to contest them. B. Pascal, *Pensées*, Oxford 1995, Oxford University Press, p. 35.

Whoever knows him knows the reason for everything.”<sup>38</sup> Calvin gives us a list of what we have in Christ, “...salvation, ...gifts of the Spirit, ...strength, ...purity, ...gentleness, ...redemption, ...acquittal, ...remission of the curse, ...satisfaction, ...purification, ...reconciliation, ...mortification of the flesh, ...newness of life, ...immortality, ...inheritance of the Heavenly Kingdom, ...protection, ...security, ...abundant supply of all blessings, ...untroubled expectation of judgment, ...In short, since rich store of every kind of good abounds in him, let us drink our fill from this fountain, and from no other.”<sup>39</sup>

These good things belong to humans both in a legal, forensic way and in an experiential, spiritual way. These two sides of the work of Christ have to be finely balanced according to the mental leanings of individual students. The first is the *status* given to Christians by Christ’s merits the other is a *process* that applies Christ’s powers to Christians’ personality.

### 3.1. The Son of God – Liberator

Jesus, in his speech in the synagogue in Nazareth, quoted the words of Isaiah, “The Spirit of the Lord is upon me, because he has anointed me to proclaim ... liberty to the captives” (Lk. 4:18). Personal spiritual liberation always begins by dealing with sin (Jn 8:34). Guilt, as a consequence of sin, is an all-pervasive problem of humanity. A psychologist writes, “I do not believe we can fully understand the dynamics of any psychological maladjustment or problem in emotional living apart from the influence of the guilt emotion.”<sup>40</sup> Although it is important to distinguish between real and false guilt<sup>41</sup> both kinds cause deep unhappiness that needs to be dealt with before God. From social judgment that is the source of false guilt “[w]e become independent in proportion as we depend on God.”<sup>42</sup> To bring students to experience liberation from real guilt, we have to explain the Gospel and rely upon the work of the Holy Spirit. Any accusation, whether justified or unjustified, can be presented to Jesus. He becomes their personal and

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<sup>38</sup> P. Pascal, *Pensées*, 1995, p. 171.

<sup>39</sup> J. Calvin, *Institutes of the Christian Religion I*, 2006, pp. 527–528.

<sup>40</sup> B. Narramore, *Guilt: Its Universal Hidden Presence*, “Journal of Psychology and Theology” 2 (1974), p. 105.

<sup>41</sup> False guilt “...is not based on God’s view of things but on a distorted self-understanding, related to damaging social experiences.” E.L. Johnson, *God and the Soul Care*, 2017, p. 470.

<sup>42</sup> P. Tournier, *Guilt & Grace*, Crowborough 1986, Highland Books, p. 70.

ongoing liberator. In 2 Corinthians 5:14<sup>43</sup> they will see “...that every one that truly considers and ponders that wonderful love, which Christ has manifested towards us by his death, becomes, as it were, bound to him, and *constrained* by the closest tie, and devotes himself wholly to his service.”<sup>44</sup>

### 3.2. The Son of God – Hero

Hero-worship is not a biblical idea. To avoid pagan heroic attitudes towards the supernatural abilities of Jesus, religious educators usually stress the down-to-earth facts of Jesus’ life and ministry. We focus on his acts of mercy, his human attributes, and his teaching. On the other hand, concentrating on Jesus as a wonder-worker may lead to mythological views of Jesus that were popular with the detractors of the Gospel right from the beginning. This is a topic in comparative mythology and it must be seriously discussed before it is dismissed as erroneous.<sup>45</sup>

Admiration of Jesus that leads to holiness must approach him through his resurrection. To admire Jesus’ glory requires the heart of a believer<sup>46</sup> who in the freedom of the Spirit beholds the glory of the Lord and is transformed by it (2 Cor. 3:17–18). Christian faith as a historical religion is firmly bound to *historical* Jesus but man’s communion with him is *spiritual*. Calvin comments on 2 Cor. 5:16: “...we acknowledge Christ as man, and as brother of people in his flesh – not in a fleshly manner; because we rest solely in the consideration of his spiritual gifts.”<sup>47</sup>

The spiritual relationship with Jesus will take some careful theological study of his person and work. On the negative side, it is advisable to warn students about the heresies related to this topic. I think no censorship should be involved,

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<sup>43</sup> For the love of Christ controls us, because we have concluded this: that one has died for all, therefore all have died.

<sup>44</sup> J. Calvin, *Commentary of Paul the Apostle to the Corinthians II.*, Edinburgh 1899, Calvin Translation Society, p. 230.

<sup>45</sup> Today we find this approach in books like: D.R. MacDonald, *Mythologizing Jesus*, Lanham 2015, Rowman & Littlefield.

<sup>46</sup> “Where the subject (the soul) is not previously seasoned with grace and faith, it is not capable of glory or vision. Nay, persons not disposed hereby unto it cannot desire it, whatever they pretend: they only deceive their own souls in supposing that so they do.” J. Owen, *Works*, Vol. I., London 1850, Johnstone and Hunter, p. 288.

<sup>47</sup> J. Calvin, *Commentary of Paul the Apostle to the Corinthians II*, 1899, p. 233.

but rather a clear explanation of the problems. In theology, the so-called 'quest for historical Jesus' is still popular today, despite its failure, as described in a book by the famous Albert Schweitzer in 1906.<sup>48</sup>

In spiritual formation, teachers should always remember that "...in the person and work of Christ we are concerned with comfort for the frightened conscience."<sup>49</sup> That leads us to the most important subject of all: the cross of Christ. Jesus often called himself 'the Son of man.' That title points to Dan. 7:13ff where "...the Son of man is a being of heavenly origin, one who will bring in God's kingdom."<sup>50</sup> This idea of glory is joined with Jesus' humble status of a servant. As the Bible states in Philippians 2:8–11 that "...he humbled himself by becoming obedient to the point of death, even death on a cross. Therefore, God has highly exalted him and bestowed on him the name that is above every name, so that at the name of Jesus every knee should bow, in heaven and on earth and under the earth, and every tongue confess that Jesus Christ is Lord, to the glory of God the Father." Christ on the cross is not to be pitied as a martyr, but worshiped as Christ Victorious.<sup>51</sup>

Christ's achievements on the cross are to be cherished and admired. It will mould the students' understanding of the Gospel, their Christian experience, and their understanding of modern thought.<sup>52</sup>

#### 4. Commitment to action: discipleship

Jesus said, "If you love me, you will keep my commandments" (John 14:15). The grace of God that does not transform the life of the believer has been dubbed 'cheap grace.' The problem of 'cheap grace' is "...the justification of sin without the justification of the sinner."<sup>53</sup> In reality, trying to make Christian life easy, comes at the cost of making it an uncomfortable burden. "Only the man who follows the command of Jesus single-mindedly, and unresistingly lets his yoke rest upon him, finds his burden easy, and under its gentle pressure receives

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<sup>48</sup> A. Schweitzer, *The Quest of the Historical Jesus*, New York 2005, Dover Publications.

<sup>49</sup> G.C. Berkouwer, *The Person of Christ*, Grand Rapids 1954, Eerdmans, p. 103.

<sup>50</sup> L. Morris, *The Cross in the New Testament*, Grand Rapids 1999, Eerdmans, p. 31.

<sup>51</sup> G. Aulén, *Christus Victor*, London 1975, SPCK.

<sup>52</sup> P.T. Forsyth, *The Cruciality of the Cross*, London 1909, Hodder and Stoughton, p. 6.

<sup>53</sup> D. Bonhoeffer, *The Cost of Discipleship*, New York 1979, Macmillan Publishing Co., p. 46.

the power to persevere in the right way.”<sup>54</sup> Sometimes, faith is not very certain of itself, but it can grow only if it is put into practice. “Acquiring knowledge presupposes that what is learnt is used in the service of fellow human beings and the community.”<sup>55</sup> Jesus lived in the bustle of daily life, meeting all sorts of people, helping them and also confronting them. His followers should not shun human society in order to be ‘holy.’

#### 4.1. Discipleship in community

The popular slogan “Jesus yes, Church no!” may be an expression of modern Western individualism, but it does not lead to discipleship of covenantal love and relationships among the organs of the Body of Christ. The twin commandments of love (love of God and love of neighbour Mk 12:28–31) connect these relations inseparably together.

Liberty in Christ demands that students learn willing submission to the authorities put over us by God. The modern view of authority as a threat to personal autonomy, will be replaced by regarding it as a gift for training us in godliness. Christians are all too familiar with the problems of irresponsible leadership, but rebellion is not a Christian solution. Submitting to Church authority and mutual submission among Church members is possible without tension if Christians genuinely learn in humility to count others more significant than ourselves (Phil. 2:3).

Family is an area that is under sustained attack in contemporary society.<sup>56</sup> Some of religious education students may have had traumatic experiences of divorce or abuse in their family. Still, if they desire to live a life of Christ’s disciple, they need to hold family and marriage in honour (Heb 13:4). “The history of the human race begins with a wedding”<sup>57</sup>. The Christian takes high view of his/her family role and seeks to fulfil its potential. On the other hand, family ties must not interfere with the higher priority of Jesus’ call to follow him (Mt. 8:18–22).

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<sup>54</sup> D. Bonhoeffer, *The Cost of Discipleship*, 1979, p. 40.

<sup>55</sup> A. de Muynck, H. Vermeulen, B. Kunz, *The Essence of Christian Teaching*, Gouda 2018, Driestar Christian University, p. 52.

<sup>56</sup> The problems of family and gender roles are two complicated to even touch on them in a short article like this. It will be up to the teacher to introduce the problematics and recommend the suitable literature.

<sup>57</sup> H. Bavinck, *The Christian Family*, Grand Rapids 2012, Christian’s Library, p. 7.

Such decisions are not easy but are an inevitable part of living in the inimical world of unbelievers.

Living in Western democracies, Christians have a paradoxical role, which includes both participating and critiquing political powers. Although obedient to the authority of the state (Rom. 13), the Christian is not an unthinking performer of the state's will.<sup>58</sup> The political and cultural scene is very sensitive to Christian intervention and may easily react with some form of persecution. Therefore, it is extremely important to make sure that the positions of the religious education teacher is based on solid and demonstrable arguments.

#### 4.2. Discipleship and private life

Christ calls his disciples to spend time alone with the Father “who is in secret” (Mt. 6:6). On the emotional side, isolation and freedom are closely related.<sup>59</sup> It means that temporary spiritual aloneness is an application of spiritual liberty that brings with itself necessity of self-discipline. Historically, spiritual disciplines like solitude, prayer, fasting, service focused on practices, meant for special class of ‘the religious’ who were surrogates for the secular laypersons. The Reformers rejected such a division of religious roles and stressed equal spiritual value of all ways of life. Recent resurgence of interest in spiritual disciplines in Protestant circles comes with what has been called ‘the desecularization of the world.’<sup>60</sup> The stress is on how the outward practices and habits can lead to deeper spiritual experience of the presence of God.

In introducing religious education students to spiritual disciplines<sup>61</sup> the teacher has to select those suitable to the individual personal needs of the students. Perhaps, the best way is to study spiritual practice in the lives of historic

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<sup>58</sup> “Our obedience to Magistrates ought to be such, that the obedience which we owe to the King of kings shall remain entire and unimpaired.” W. Pringle, *One Hundred Aphorisms*, in: J. Calvin, *Institutes of Christian Religion*, Transl. Henry Beveridge, Peabody 2009, Hedrickson Publishers, p. 1001.

<sup>59</sup> “Freedom brings isolation from others, and lack of freedom brings belonging...” K.T. Strongman, *The Psychology of Emotion*, Chichester 2003, John Wiley & Sons, p. 148.

<sup>60</sup> P. Berger (ed.), *The Desecularization of the World*, Washington 1999, Ethics and Public Policy Center.

<sup>61</sup> A.A. Calhoun, *Spiritual Disciplines Handbook*, Downer Grove 2015, InterVarsity Press.

Christian personalities. The two basic disciplines of Bible reading and prayer are well illustrated in the life and theology of Jonathan Edwards.<sup>62</sup>

#### 4.3. Discipleship and the call of God

“Train up a child in the way he should go...” (Prov. 22:6) is saying that we should teach a child ‘in his way.’<sup>63</sup> The possessive suffix attached to the word ‘way’ in Hebrew suggests that the instructions should be adjusted to the individuality of the child<sup>64</sup> “...according to the physical and mental abilities of the developing youth.”<sup>65</sup> This makes demands on the teacher’s knowledge of the personalities of the pupils. If we describe personality development along the following three lines: “(1) from infant temperament to the articulation of adult personality traits ... (2) from childhood intentionality to the development of life goals and values ... (3) from the emergence of episodic memory in childhood to the construction of narrative identity”<sup>66</sup> it should be clear that teacher/spiritual director has to be an acute observer and guide during the construction of an identity that will agree with the call of God for the young person.

In spiritual formation towards holiness, personality theories and personality traits<sup>67</sup> have to be applied in the light of theological anthropology<sup>68</sup> and biblical ethics. In this way, it will be possible to relate personality traits described in psychology (and observed in religious education students) to the New Testament call of God to repentance and the life of following Jesus. Ethically ‘neutral’ personality traits that are dominant in an individual student can

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<sup>62</sup> D.C. Ortland, *Edwards on the Christian Life*, Wheaton 2014, Crossway.

<sup>63</sup> New Jerusalem Bible translation is: “Give a lad a training suitable to his character.”

<sup>64</sup> “The training prescribed is lit. ‘according to his (the child’s) way’, implying, it seems, respect for his individuality and vocation, though not for his selfwill...” D. Kidner, *The Proverbs*, London 1973, Inter-Varsity Press, p. 147.

<sup>65</sup> B.K. Waltke, *The Book of Proverbs, Chapters 15:30–31:31*, Grand Rapids 2005, Eerdmans, p. 205.

<sup>66</sup> D.P. McAdams, R.L. Shiner, J.L. Tackett (eds.), *Handbook of Personality Development*, New York 2019, The Guilford Press, p. 16.

<sup>67</sup> B. Engler, *Personality Theories*, Belmont 2014, Wadsworth, p. 263.

<sup>68</sup> M.A. Hinsdale, S. Okey (eds.), *T&T Clark Handbook of Theological Anthropology*, London 2021, T&T Clark.



then be developed or modified in light of biblical ethics<sup>69</sup> in the direction of the perceived call of God.

#### 4.4. Discipleship: inward and outward tensions

It has never been easy, yet in this era of self-gratification, it is especially hard to set oneself a goal of pursuing holiness. Liberty of action presupposes the liberty of the mind, but it is the mind that is constantly bombarded by images of self-indulgence as seen in *Century of the Self* documentary. The constant exposure to media (especially visual) very much exasperates the basic spiritual conflict described in the Letter to the Romans, Chapter 7, that is, the division between the desires of the mind and the desires of the flesh.<sup>70</sup> A subtle form of persecution of Christians in the West is implemented by relegating religious faith to the sphere of "...a private preference, a spare-time hobby, a leisure pursuit."<sup>71</sup> In a politically correct environment, such privatisation of faith is viewed as an inalienable right of all humans and it is most improper to cast doubt upon it by witnessing to the truth of Christianity. To even think that unbelievers are "...in an infinitely miserable condition..."<sup>72</sup> amounts to the violation of their human dignity and the right of free thinking. Nevertheless, following Christ without confessing him publicly is impossible (Mk 8:38).

Liberty in self-denial and self-control may sound like an oxymoron, but it is possible if the disciple can be motivated by meditation on the future life.<sup>73</sup>

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<sup>69</sup> Principles of biblical theological ethics can be found in: H. Bavinck, *Reformed Ethics*, Grand Rapids 2019, Baker Academic. For introduction to contemporary Christian ethical thought consult: S. Hauerwas, S. Wells (eds.), *The Blackwell Companion to Christian Ethics*, Chichester 2011, Wiley-Blackwell.

<sup>70</sup> Several types of this conflict are treated in the 20th century classic: M. Lloyd-Jones, *Spiritual Depression, its Causes and Cure*, Grand Rapids 2003, Eerdmans.

<sup>71</sup> O. Guinness, *The Gravedigger File*. London 1983, Hodder and Stoughton, p. 74.

<sup>72</sup> J. Edwards, *Thoughts on the Revival of Religion in New England*, New York 1735, American Tract Society, p. 245.

<sup>73</sup> J. Calvin, *A Little Book on the Christian Life*, 2017, pp. 83–104.

## 5. Conclusion

The formation towards spiritual maturity and holiness has to be realized in the midst of many disturbing problems of modernity: wars, ecological disasters, economic injustice, racial hatred, egotism etc.<sup>74</sup> Nevertheless, Christians are not called to get out of the world but to be sanctified in the world (Jn 17:15).

In teaching, definition of terms is the first condition of understanding. In the Bible, the notions of 'liberty' and 'holiness' differ markedly from the common 'dictionary' definition of these words. A clear understanding has to precede practical instruction.

In order to attain certainty in the minds of students, we must deal with the ideas and attitudes that secularism puts in the way of the Christian mind. In our analysis of contemporary Western culture, they are scientism, monism, selfism, and evolutionism. These systems of thought have become 'second nature' methods of approach to all problems in life.

Although certainty of faith is crucially important for successful Christian living, it is the love for Christ that is the ultimately decisive factor in the spiritual formation towards holiness. One of the definitions of 'holy' is 'that what belongs to God.' For human beings to belong to God means to love him, and it is by loving emotional attachment to Christ that Christians become his 'love-slaves'.

Inward change naturally leads to change in behaviour. Formation of habits that support the spiritual life, has to be realized both in the Church community and privacy of personal life. As spiritual guides, teachers should respect individual personality traits in their students. In this way, a balanced training in various subjects can also become a preparation for the individual call of God.

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<sup>74</sup> J.J. Davis, *Evangelical Ethics, Issues Facing the Church Today*, Phillipsburg 2015, Presbyterian and Reformed.

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## **A Duty to Remain Connected: a Biblical Perspective of the Wisdom of the Shabbàt**

### **Abstract**

Our labour is intricately woven into our identity, extending beyond mere livelihood. It ought to facilitate personal growth, define our societal roles, and contribute to a common good within the confines of social and environmental sustainability. However, the contemporary work landscape is undergoing profound and global changes, disrupting traditional and conventional notions of work dynamics and its associated relationships. Amidst the diverse and country-specific alterations, a universal paradigm shift is reshaping nearly every sector of the economy. The pressing question emerges: how can we prevent the shift towards more flexible employment from translating into a life of perpetual instability? As job structures become more malleable and the boundaries between professional and personal life blur, the risks of self-exploitation and work-induced stress loom.

In navigating these transformations, we must discern the evolving paradigms of work and consider their social and economic repercussions. What lessons are we being prompted to internalise as the European work landscape undergoes unprecedented changes? It becomes imperative to explore these shifts and their implications for a sustainable and equitable future.

Exploring the existential insights of the Shabbàt and extracting valuable lessons from biblical wisdom, prompts us to ponder the significance of rest in fostering healthy relationships and connectivity—with ourselves, others, our work, and our shared environment. The prevalent culture of constant availability and the obligation to stay connected could benefit from a biblical perspective, particularly in grasping the essence of Shabbàt's wisdom.

### **Keywords**

Shabbàt, work, rest, connectivity, common home, creation

## 1. Introduction

The conceptual framework, if not the institutional embodiment, of the Shabbàt encapsulates multifaceted themes, encompassing repose, sanctification, admiration, acknowledgment, a holistic perspective on individual and universal existence, wholeness, holiness, and healing. This contribution is dedicated to a focused examination of the facet pertaining to connectivity within the context of the Shabbàt as delineated in the Old and New Testaments.

Our vocational pursuits are intricately interwoven into the fabric of our identity, transcending mere subsistence. Their role extends to facilitating personal development, delineating societal roles, and contributing to a collective good within the parameters of social and environmental sustainability. However, the contemporary labour landscape is undergoing profound and global transformations, disrupting conventional norms governing work dynamics and associated relationships.

The COVID-19 pandemic triggered a significant shift towards remote work, with many organisations offering flexible arrangements to their employees. Hybrid work models, combining remote and in-person work, have become prevalent. This approach balances the benefits of collaboration and innovation with the flexibility of remote work. Employee well-being has become a top priority, with many organisations providing mental health support programmes, contributing to increased productivity and satisfaction. Amid pandemic challenges, organisations accelerated digital transformations, investing in technology for efficiency and resilience, positioning them well in the digital age.<sup>1</sup>

Amidst diverse alterations specific to regions, a pervasive paradigmatic shift is reshaping nearly every economic sector. The salient inquiry emerges: How can the transition towards more flexible employment be mitigated to prevent a life marked by perpetual instability? As occupational structures become more adaptable and the demarcation between professional and personal spheres becomes blurred, the perils of self-exploitation and work-induced stress become imminent.

In navigating these transformative shifts, it is imperative to discern the evolving work paradigms and consider their societal and economic implications.

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<sup>1</sup> See L. Garrad, *A Paradigm Shift in Work Culture: Are We Ready for the Consequences of Remote Work?*, <https://www.linkedin.com/pulse/re-thinking-employee-experience-remote-workers-part-1-lewis-garrad> (23.01.2024).



What instructive insights does the metamorphosis of the universal work landscape offer? It becomes essential to scrutinise these transformations and their potential impact on fostering a sustainable and equitable future.

The exploration of existential insights derived from the Shabbàt and the extraction of valuable lessons from biblical wisdom prompt contemplation on the pivotal role of rest in cultivating robust relationships and connectivity – with oneself, others, one’s work, and the shared environment. The prevalent culture of perpetual availability and the obligation to remain connected could derive meaningful insights from a biblical perspective, particularly in grasping the essence of Shabbàt’s wisdom.

Glory as a marker of God’s identity, the Shabbàt’s genesis, connectivity in Genesis and Exodus, broken connectivity, and the Son of Man as the Lord of the Shabbàt constitute pivotal themes. The comprehensive content of Scripture serves as an incontrovertible foundation, affirming that the Shabbàt does not advocate a culture characterised by incessant labour availability. Rather, it underscores an obligation to sustain connectivity across multiple dimensions: with oneself, the divine, fellow individuals, within spatial and temporal realms, and indeed, with the entirety of the natural world. This elucidates the biblical standpoint on the sagacity inherent in observing the Shabbàt – a day of repose following the creation of the world’s magnificence.

## 2. *Glory*

It is evident, from the word *go*, that the Shabbàt has fundamentally to do with God’s identity. It is the day of acknowledgement of God’s glory in his creation and sharing, evinced in the six exclamations of “God saw that it was good”<sup>2</sup> (*wayyàr’elôhîm kî-thôb* in Genesis 1:4.10.12.18.21.25) and the culminating: “behold it was very good” (*w<sup>e</sup>hinnèh-thôb m<sup>e</sup>’ôd* in Genesis 1:31).

The Hebrew lemma for glory is *kabòd*, a cognate noun from the verb *kabèd*, with the basic meaning of “to weigh”.<sup>3</sup> The more weight is attributed to a person’s words, actions, attitudes, character, and talents, the more praise and glory

<sup>2</sup> If not otherwise stated, quotations from Scripture are taken from *The Revised Standard Version*.

<sup>3</sup> Ch. Dohmen, P. Stenmans, M. Weinfeld discuss the meanings of קָבַד [*kābèd*] and קְבוֹד [*kābòd*], in: G.J. Botterweck, H. Ringgren, H.J. Fabry (eds.), *Theological Dictionary of the Old Testament*, vol. 7, Grand Rapids, MI 1995, Eerdmans, pp. 13–38.

are heaped upon that person. Their glory is proportional to their weight. Similarly, in the New Testament, the Greek noun for glory, *dóksa*,<sup>4</sup> derives from the fundamental verb *dokein*: “to think, to form an opinion”. The higher the opinion enjoyed by a person, the more praise and glory are attributed to them. Basically, this means that glory is the perceived identity that occasions the praise attributed to that person. Creation is the celebration itself of God’s glory since his splendour transpires through his creation.

### 3. The Creation of *Shabbàt*

How does this relate to the wisdom of the *Shabbàt*? According to the creation account in Genesis 1 from the 6<sup>th</sup> century BCE,<sup>5</sup> YHWH created and consecrated the *Shabbàt* on the seventh day. God’s glory in creation and his sharing with humankind what YHWH himself could create forms a formidable link.

It was only about human beings that God proposed: “Let us make humankind in our image, according to our likeness” (Genesis 1:26), and the author commented: “So God created humankind in his image, in the image of God he created them; male and female he created them” (v.27). This image and likeness are partly seen in the following action and command of God: “Be fruitful and multiply, and fill the earth and subdue it; and have dominion over the fish of the sea and over the birds of the air and over every living thing that moves upon the earth” (Genesis 1:28). Male and female were to continue doing, “in his likeness and image”, what God himself had begun. God’s glory and identity is further enhanced by humankind’s sharing in the same glory and identity that were transferred to and communicated with humanity. If God shared his glory and identity in creation, not only in what he brought into existence, but also in sharing that creative glory and identity with humanity, then he could indeed: “see everything that he had made and it was very good [*thòb m’òd*]” (v.31).<sup>6</sup>

<sup>4</sup> For a detailed discussion of δόξα [*dóksa*] and cognates, see: G. Kittel, δοκέω [*dokéō*] et al, in: G. Kittel (ed.), G.W. Bromiley (trans.), *Theological Dictionary of the New Testament*, vol. 2, Grand Rapids, MI 1964, Eerdmans, pp. 232–255.

<sup>5</sup> See J. Neusner (ed.), *Sabbath*, in: *Dictionary of Judaism in the Biblical Period (450 B.C.E. to 600 C.E.)*, Peabody, MA 1996: Hendrickson, pp. 538–539.

<sup>6</sup> *thòb m’òd*: there are no degrees of comparison in adjectives in Hebrew, so, *thòb m’òd* would mean ‘perfect’.

It was only after all the separation and embellishment actions that resulted in perfection, that God could rest.<sup>7</sup> His glory was completely sealed not in the creation actions themselves, but in wrapping that glory in a day of rest, in creating the Shabbàt. Admiration and acknowledgment of creative works can only occur through pausing and reflecting on their glory within a specific moment in time. God himself did so: he rested and could see that: “it was all so very good” (Genesis 1:31). “So God blessed the seventh day and hallowed it, because on it God rested from all the work that he had done in creation” (Genesis 2:3). God could bless and sanctify the Shabbàt because on it he rested [*kî bô shābàt*] from all the work he had done! God sanctifies the Shabbàt by resting! Rabbi Abraham Joshua Heschel notes it is exclusive of the Shabbàt that: “God blessed the seventh day and made it holy [*way<sup>e</sup> qaddēsh*] (Genesis 2:3). There is no reference in the record of creation to any object in space that would be endowed with the quality of holiness, *qādōsh*.”<sup>8</sup>

The glory/identity of God finds its zenith precisely in the Shabbàt, the Day of Rest—the day of admiration of all that is *thôb m<sup>e</sup> ôd*, very good, not primarily and exclusively in the six days of creation. God’s sharing and communicating his creative powers with humankind lead to the contemplation of the Day of Rest, the Shabbàt.

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Discussing John 5:17 (“My Father is still working, and I am working also”) in view of Genesis 2:2–23, A.J. Droge, *Sabbath Work/Sabbath Rest: Genesis, Thomas, John*, “History of Religions” 47 (2007) 2/3, pp. 128–130, states that: “the ‘Sabbath rest’ has not yet occurred because creation itself remains unfinished and incomplete” and “What first appears, then, as a violation of the Sabbath in John 5 turns out to be a demonstration that the Johannine hero must continue to work on the seventh day because the true rest for creation has not yet been achieved.”

<sup>7</sup> The first three days were spent in four actions of separation of light from darkness (Genesis 1:3–5 – First Day); the waters of the heavenly realm from those below the heavens (Genesis 1:7), and of the waters of the seas from the dry land (Genesis 1:9–10 – Second Day); and plants from trees (Genesis 1:11 – Third Day). During the second set of three days four works of embellishment ensued: the lights in the skies: the sun, the moon and the stars (Genesis 1:14–19 – the Fourth Day); swarms of living creatures in the waters and birds above the earth across the dome of the sky (Genesis 1:20–22 – the Fifth Day), and animals on the land (Genesis 1:25), and the human beings (Genesis 1:26–31 – the Sixth Day). The Shabbàt was created on the day following the second set of three days of four embellishment actions by the Creator.

<sup>8</sup> *The Sabbath: Its Meaning for Modern Man*, New York, 1951, Farrar, Straus, Giroux, p. 9. For a detailed discussion of the origin of the Shabbàt, see T.W. Martin, *Sabbath*, in: R.L. Brawley (ed.), *The Oxford Encyclopedia of the Bible and Ethics*, vol. 2, Oxford, 2014, Oxford University Press, pp. 233–237.

Heschel observes that: “This is a radical departure from accustomed religious thinking. The mythical mind would expect that, after heaven and earth have been established, God would create a holy place—a holy mountain or a holy spring—whereupon a sanctuary is to be established. Yet it seems as if to the Bible it is holiness in time, the Shabbàt, which comes first.”<sup>9</sup> God does not bless and sanctify the days he himself had made by creating a culture of permanent availability, of continuous work, but by resting, by creating the Shabbàt!

#### 4. Connectivity in Genesis and in Exodus

The second creation account from around the 10<sup>th</sup> century BCE in Genesis 2:7–8 within the pericope of 2:4–25, gives us a more detailed and anthropomorphic description of the creation of the *’ādām*, humankind.<sup>10</sup> “The Lord God formed the *’ādām* from the dust of the ground, and breathed into his nostrils the breath of life; and the *’ādām* became a living being” (v.7). The author writes: “*wayyizer YHWH ’elōhīm ’et-hā’ādām*”. But the verb *yāzār* is the potter’s verb (Isaiah 45:9; 64:8; Jeremiah 18:4.6), who fashions, forms, each of his items individually, not in a mould! However, in order that the *’ādām* God had created *’āphār min-hā’adāmāh*, from the dust of the ground (Genesis 2:7),<sup>11</sup> could become a living being, God “breathed into his nostrils the breath of life” (Genesis 2:7). God connects in an eminent way with *’ādām*, first by fashioning him individually, and then by sharing his own *nishmāt hayyīm*, his own living breath (Genesis 2:7), where the Hebrew lemma *n<sup>e</sup>shāmāh* is equivalent to *néphesh*, breath, spirit.<sup>12</sup> God connects with humanity through his own life that transforms humankind into God’s own likeness and image. God’s connectivity begins in creation but does not stop with his Shabbàt.

This sharing in God’s own life is brought up a notch in Exodus 31:12–17. Israel is to keep the Shabbàt as a covenant between it and God. Verse 17 describes the

<sup>9</sup> Heschel, *The Sabbath*, p. 9.

<sup>10</sup> See J. Neusner, *Sabbath*, pp. 538–539.

<sup>11</sup> Note the play on words in *’ādām* and *hā’adāmāh*.

<sup>12</sup> H. Lamberty-Zielinski, נִשְׁמַת [n<sup>e</sup>shāmāh], in: G.J. Botterweck, H. Ringgren, H.J. Fabry (eds.), *Theological Dictionary of the Old Testament*, vol. 10, Grand Rapids, MI 1999, Eerdmans, p. 67.

Shabbàt within a covenantal commandment in terms of 'ādām's creation: "It is a sign forever between me and the people of Israel that in six days YHWH made heaven and earth, and on the seventh day he rested, and was refreshed". The wisdom of God in creating everything as *thôb m<sup>e</sup> òd*, after fashioning each individual in a unique manner and sharing with them his own breath, so that they became living beings, is further established by God resting after the last of his creation work, humankind. He rested, so that he could be refreshed, *wayyinnāphàsh*—the root verb for *nephesh*—after connecting his own living being with humankind!

God rests in order to connect again with himself, since while creating humankind, he was continually sharing his living breath with humanity, to the point, as it were, of exhausting himself. Now, on the Shabbàt, in an extremely anthropomorphic depiction by the author, he has to reconnect with himself and replenish his own breath. In this regard, Shabbàt is perceived as a perpetual covenant and a sign (*b<sup>e</sup>rit 'òlām* in v.16 and *'òt* in v.17), and covenants, even if unilateral, are essentially connective of two parts, God and Israel in this case.

The Genesis description gives the occasion for which God created the Shabbàt and the reason for hallowing it: Shabbàt is a day of rest for God, for humankind and for animals and a symbol of connectivity. On its part, Exodus 20:8–11 presents Shabbàt as one way of imitating God by resting and giving rest: "you shall not do any work: you, your son or your daughter, your male or female slave, your livestock, or the alien resident in your towns" (v.11). Shabbàt is one unique way of creation connecting with God by imitating him in his rest.

## 5. Broken Connectivity

Due to sin, the initial connection between humanity and their God-given likeness was severed. This disconnect became so profound that Adam and Eve felt shame and avoidance in encountering God (Genesis 3:7–11). In response to this state of affairs, the Apostle Paul introduces Christ Jesus as the sole means of restoring humanity to the profound state of the *thôb m<sup>e</sup> òd* described in Genesis 1:31. In Ephesians 1:9–10 Paul writes: "He has made known to us the mystery of his will (*thélēma*) [of making everything so good again], according to his good pleasure that he set forth in Christ, as a plan for the fullness (*plērōma*) of time, to gather up all things in him, things in heaven and things

on earth”<sup>13</sup> Christ Jesus, according to Paul, is the one who connects all creation back to God in its fundamental categories of time and space. Rabbi Heschel was right when he wrote that Shabbàt is “a time in space” and “a sanctuary in time.”<sup>14</sup>

## 6. The Son of Man – Lord of the Shabbàt

During his incarnate earthly life, Jesus—in whom the *plêrôma* of God’s *thêlêma* was brought again to its original state—dealt with the Shabbàt in a unique manner.<sup>15</sup> Not only did he uphold the Shabbàt, but he taught his fellow Jews the right significance of this hallowed day. However, one must bear well in mind that under certain circumstances, individuals who were engaged in special service to the Lord, could ignore prohibitions against work on the Shabbàt and receive no censure. “Have you not read in the law that on the Shabbàt the priests in the temple break the Shabbàt and yet are guiltless?” (Matthew 12:5).<sup>16</sup> By referring to Leviticus and Numbers in the Toràh, Jesus is anchoring his actions by considering himself as God’s agent of eschatological foreshadowing. He considers himself (“The Son of Man is lord of the Sabbath”, Matthew 12:8) as the precursor of the age to come, when God would act to bring his people to complete rest again. Thus, Jesus’ Shabbàt actions are best understood in light of the eschatological emphasis that the Shabbàt, received as representing the time when God would decisively act to fulfil the hopes of his people, as well as in light of the Shabbàt, as a special day of blessings for God’s people. These blessings can, summarily, be grouped as his presence, his freedom from bondage in light of the exodus, and Israel’s sanctification.<sup>17</sup>

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<sup>13</sup> “Heaven” and “earth” form a *merismus*, where the parts stand for the whole: heaven and earth, and everything in between.

<sup>14</sup> Heschel, *The Sabbath*, p. xiii.

<sup>15</sup> T.W. Martin, *Sabbath*, pp. 235–236. See also S. Westerholm, C.A. Evans, *Sabbath*, in: C.A. Evans, S.E. Porter (eds.), *Dictionary of New Testament Background*, Downers Grove, IL 2000, InterVarsity, pp. 1031–1035.

<sup>16</sup> See Leviticus 24:8 for the changing of shewbread on the Shabbàt, and Numbers 28:9–10 for the doubling of the burnt offering on the Shabbàt). See also, R.H. Gundry, *Matthew. A Commentary on his Handbook for a Mixed Church under Persecution*, second edition, Grand Rapids, MI, 1994, Eerdmans, pp. 223–224.

<sup>17</sup> See M.H. Burer, *Jesus, Sabbath Actions, and Divine Sabbath Work*, in: *Divine Sabbath Work*, Pennsylvania, 2012, Pennsylvania State University Press, pp. 108–109.

### 6.1. Eighteen Years of Disconnection

It was on a Shabbàt day (see Luke 13:10–17), when Jesus was teaching in one of the Jewish synagogues and healed a woman who was cripplingly bent over and unable to stand up straight for eighteen years. Her physical disability definitely separated her in a significant manner from connecting with others: probably other persons had to come very close to her in order for her to recognise them. Her crippling condition restricted her world to the patch of ground that she could only see by looking down. When Jesus saw her, he called her forward and said: “Woman, you are set free from your ailment” (Luke 13:12). And he laid his hands on her. Immediately she stood up straight and began praising God (v.13). The healing Jesus brought to her, not only took away the lack of connectivity with other people she suffered from previously, but also immediately connected her with God in her praising him for her healing.

Not so the leader of the synagogue: he became indignant because Jesus had cured on the Shabbàt, and also because the crowd kept coming to Jesus to be healed even on the Hallowed Day. He expressed his indignation at this blatant breaking of the Shabbàt rules by exclaiming: “There are six days on which work ought to be done; come on those days and be cured, and not on the Sabbath day” (v.14). Jesus availed himself of this opportunity to explain the true meaning of the Shabbàt: not just desisting from work but especially connecting with God, with other persons and with the whole of nature. Shabbàt is the time and space symbol of the eschatological *thôb m<sup>e</sup> òd* towards which God wishes to lead the whole of his creation so that all creation can praise and glorify him in an always more complete manner. Hence, one day in seven, all human hierarchies are suspended and everyone—master, employer, employee and even animals—is free to celebrate their uniqueness in an egalitarian framework.

Jesus proffers the quotidian example of work done on the Shabbàt, so that animals can be refreshed by being taken to water troughs to drink. Healing, in all its forms—animals by drinking, people by being physically and emotionally healed—brings out the whole true meaning of the Shabbàt. God rested when everything he had created was *thôb m<sup>e</sup> òd*. Both Luke, the narrator (v.16), and Jesus, in his response to the synagogue leader (v.18), established a connection between the woman and her previous eighteen years of suffering. According to Jesus, this suffering was a consequence of Satan’s influence, which had kept her bound until he brought her freedom. His mission of restoring all creation to the original *thôb m<sup>e</sup> òd* was translated into making it—humanity, in the first place—whole again.

## 6.2. Connectivity with Downtrodden Humanity

Finally, but most importantly, Jesus enters the synagogue of Nazareth on a Shabbàt, and reads from the book of Isaiah: “The spirit of the Lord God is upon me, because the Lord has anointed me; he has sent me to bring good news to the oppressed...” (61:1–3).

However, Jesus shows that Isaiah was not meant to stop definitively with the writing or reading of the prophecy. He sits down and links his mission of re-connecting downtrodden humanity with God and making it whole again, thus enabling it to give fuller glory to God, with that of the anointed messiah in Isaiah 61:1–3, which he had just read (see Luke 4:18–19).

## 7. Paul, the Pharisaic Jew and Shabbàt

Paul, the staunch Pharisaic Jew, never missed an occasion to use Shabbàt synagogal gatherings<sup>18</sup> to foster connections with fellow Jews, by giving them words of encouragement after the Scripture readings. During the Pisidian Antioch gathering in Acts 13:14–43, at the invitation of the synagogue leaders themselves, Paul and Barnabas exhorted the Jews in a *haggadic* retelling of the saving history of Israel from slavery in Egypt to Jesus’ saving death, resurrection and glorification.

The effect was that many Jews remained connected with the Saviour, returning the following Shabbàt to hear Paul’s teachings about Jesus once again (Acts 13:42–44). Additionally, numerous Gentiles were converted (vv.46–48; see also Acts 9:20; 18:4).

In Acts 16, a similar incident occurred at Philippi. Paul and Barnabas, through their discernment and message, connected with Lydia, a businesswoman dealing in purple cloth. She, along with her household and other God-fearers, embraced faith as a result of their encounter (Acts 16:13–15).

Paul’s teachings and references to the Shabbàt in his letters, particularly in Colossians 2:14–17, Galatians 4:8–10, and Romans 14:5 provide a more complete perspective of the Apostle on the Shabbàt. Upon analysis of the texts one would better understand whether Paul considered the Old Testament Shabbàt binding, especially for Gentile Christians.<sup>19</sup>

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<sup>18</sup> *Synagōgē* means a gathering together, implying even physical connectivity.

<sup>19</sup> See J.D.G. Dunn, *Ethics in Practice*, in: *The Theology of Paul the Apostle*, London – New York, 1998, T&T Clark, pp. 670–712, especially, pp. 681–682.



Colossians 2:14–17 begins by highlighting the limited explicit mentions of the Shabbàt in Paul’s writings, with Colossians 2:16 being the primary reference. It notes the historical consensus that Paul may have viewed the Old Testament Shabbàt as no longer binding, especially for Gentiles. Paul continues to delve into the Colossian heresy, emphasising its syncretistic nature, combining Hellenistic and Jewish elements in both theological and practical aspects.<sup>20</sup>

In Colossians 2:14–17, Paul’s focus is not on abolishing the Shabbàt but on rejecting false teachings that distorted its observance. The *cheirógraphon*, “hand-written document”, nailed to the cross is interpreted as the record of sins, not the Mosaic law or the Shabbàt itself. Paul emphasises the completeness of God’s forgiveness through Christ, removing the evidence of sins, and disarming accusers.<sup>21</sup>

Moving on to Romans 14:5, Paul addresses the notion of the Shabbàt directly. It seems that Paul’s argument suggests a conflict over days in Romans, pertaining to fast days rather than feast days. The present author is against interpreting the passage as a dismissal of Shabbàt observance, emphasising that Paul encourages mutual tolerance in non-essential matters.<sup>22</sup>

In Galatians, a marked absence of explicit references to the Shabbàt is noted but it is to be acknowledged that in Galatians 4:10, the observance of days is mentioned. The discussion here centres on the motivations behind the Galatians’ observance of sacred times, suggesting superstitious beliefs in astral influences. Paul’s opposition is seen as directed at the perversion of these practices rather than their intrinsic validity.<sup>23</sup>

In conclusion, Paul’s writings do not unequivocally repudiate the Shabbàt. Paul’s focus is rather on rejecting false teachings, distorted observances, and the misuse of religious practices for salvation. While Paul rejects legalistic adherence to the law for salvation, he upholds it as a moral standard for Christian conduct. These texts seem to clarify Paul’s nuanced stance on the Shabbàt, and in turn dispel misunderstandings about his teachings concerning the Shabbàt.

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<sup>20</sup> See M.Y. MacDonald, *Colossians and Ephesians*, Sacra Pagina Series 17, Collegeville, MN, 2000, Michael Glazier – Liturgical Press, pp. 96–126, especially, pp. 102–111.

<sup>21</sup> See MacDonald, *Colossians and Ephesians*, pp. 102–111.

<sup>22</sup> See B. Byrne, *Romans*, Sacra Pagina Series 6, Collegeville, MN, 1995, Michael Glazier – Liturgical Press, pp. 403–433, especially, pp. 403–412.

<sup>23</sup> F.J. Matera, *Galatians*, Sacra Pagina Series 9, Collegeville, MN, 1992, Michael Glazier – Liturgical Press, pp. 148–158, especially, pp. 152–153.

## 8. Conclusion

The comprehensive content of Scripture serves as an incontrovertible foundation, establishing that the Shabbàt does not advocate a culture characterised by perpetual labour availability. Rather, it underscores an obligation to maintain connectivity with oneself, with the divine, with fellow individuals, within the spatial and temporal dimensions, and indeed, with the entirety of nature. This elucidates the biblical standpoint on the sagacity inherent in observing the Shabbàt, a day of repose following the creation of the world's magnificence.

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# **Effects of Centrality of Religiosity and Dyadic Coping on Psychological Well-Being of Married Couples who Postpone Parenthood**

## **Abstract**

Religiosity and dyadic coping are among the factors important for the quality of marriage, satisfaction with the relationship and the sense of happiness of the spouses. Well-being, mainly in the aspect of personal development or life goals, seems to be particularly important for couples planning to conceive a child in the near or distant future. The study involved 51 married couples postponing parenthood. Their dyadic coping, psychological well-being and the centrality of religiosity were studied. The actor-partner interdependence model was used for the dyadic analyses. There were no differences in the well-being between the spouses, however, women rated in dyadic coping and religiosity higher. The centrality of the spouses' religiosity, and especially the congruence of their

religious beliefs, seems to have a significant impact on their well-being. The obtained results seem to shed new light on the importance of dyadic coping by spouses and their religiosity for the well-being of each of them.

## Keywords

centrality of religiosity, delaying parenthood, dyadic coping, marriage, relationship, well-being

## 1. Introduction

One of the most important developmental tasks of adulthood is building a lasting relationship and a family.<sup>1</sup> Research shows that romantic relationships play an important role in a person's life, contributing to well-being and quality of life.<sup>2</sup> Among the variables important for the quality of marriage, apart from satisfaction with the relationship and the sense of happiness of the spouses, religiosity is mentioned, as well as communication and conflict resolution skills.<sup>3</sup>

Religiosity has a positive effect on happiness and relationship satisfaction and promotes commitment.<sup>4</sup> A higher level of religiosity is related to marital commitment and marital satisfaction.<sup>5</sup> Some aspects of religiosity may be related to dyadic coping.<sup>6</sup> The more spiritually oriented the partners are, the more likely they are to engage in joint dyadic coping and more likely to offer support to their partners. Spouses with a similar religious approach to coping, use more

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<sup>1</sup> E. Erikson, *Tożsamość a cykl życia [Identity and the life cycle]*, Poznań 2004, Poland: Zysk I S-Ka.

<sup>2</sup> M. Gómez-López, C. Viejo, R. Ortega-Ruiz, *Psychological Well-Being During Adolescence: Stability and Association With Romantic Relationships*, "Frontiers in Psychology" 10 (2019), p. 1772, <https://doi.org/10.3389/fpsyg.2019.01772>.

<sup>3</sup> H. Elżanowska, *Międzypokoleniowa Transmisja Wartości w Rodzinie [Intergenerational Transmission of Values in the Family]*, "Studia z Psychologii" w KUL 18 (2012), pp. 94–114.

<sup>4</sup> J. Aman et al., *The Relationship of Religiosity and Marital Satisfaction: The Role of Religious Commitment and Practices on Marital Satisfaction Among Pakistani Respondents*, "Behavioral Sciences" 9/3 (2019), p. 30, <https://doi.org/10.3390/bs9030030>.

<sup>5</sup> S.M. Allgood et al., *Marital Commitment and Religiosity in a Religiously Homogenous Population*, "Marriage & Family Review" 45/1 (2008), pp. 52–67, <https://doi.org/10.1080/01494920802537472>.

<sup>6</sup> K.I. Pargament et al., *Some Contributions of a Psychological Approach to the Study of the Sacred*, "Religion" 47/4 (2017), pp. 718–44, <https://doi.org/10.1080/0048721X.2017.1333205>.

effective problem-solving strategies. It turns out that the partners' religiosity and their spirituality is associated with better conflict management and is a protective factor against physical, verbal and psychological violence.<sup>7</sup> The importance of religiosity in the context of close relationships and dyadic coping may result from the fact that it is associated with specific attitudes, values and norms that can translate into marital communication, mutual perception and behaviours presented in relation to a partner.<sup>8</sup>

Some studies lead to the conclusion that religiosity does not affect the quality of relationships, and sometimes it can even hinder relationships between partners.<sup>9</sup> Researchers therefore point out that religiosity can have both a positive and negative impact on the functioning of a relationship and its quality.<sup>10</sup> When determining the relationship between religiosity and relationship functioning, it is necessary to take into account the various aspects of religiosity that different relational relationships may have and the quality of relationship functioning.<sup>11</sup>

Many studies also indicate a relationship between various aspects of religiosity, well-being and life satisfaction.<sup>12</sup> Nevertheless, some studies show the lack of such a relationship, which allows us to conclude that this relationship is not unambiguous.<sup>13</sup> Probably, the type of religiosity, culture, and social expectations may be of great importance for the differentiation of the obtained results, and

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<sup>7</sup> J.L. Austin, *The Protective Roles of Spirituality, Supportive and Common Dyadic Coping Among Latino Immigrant Couples in the US*, Falls Church 2011, US: Virginia State University.

<sup>8</sup> D. Czyżowska et al., *Intimate Relationship and Its Significance for Eudaimonic Well-Being in Young Adults*, "Health Psychology Report" 8/2 (2020), pp. 155–66, <https://doi.org/10.5114/hpr.2020.93768>.

<sup>9</sup> A.M. Wendołowska, D. Czyżowska, *Centrality of Religiosity and Dyadic Coping in Close Romantic Relationships: Actor Partner Interdependence Model*, "Religions" 12/11 (2021), p. 978. <https://doi.org/10.3390/rel12110978>.

<sup>10</sup> D. Dollahite et al., *Beyond Religious Rigidities: Religious Firmness and Religious Flexibility as Complementary Loyalties in Faith Transmission*, "Religions" 10/2 (2019), p. 111. <https://doi.org/10.3390/rel10020111>.

<sup>11</sup> L.D. Marks, D.C. Dollahite, *Religion and Families: An Introduction*, New York (2016), US: Routledge, <https://doi.org/10.4324/9781315814599>.

<sup>12</sup> J.E. Ramsay et al., *Teleological Explanation and Positive Emotion Serially Mediate the Effect of Religion on Well-being*, "Journal of Personality" 87/3 (2019), pp. 676–89, <https://doi.org/10.1111/jopy.12425>.

<sup>13</sup> T. Ebert et al., *Religious People Only Live Longer in Religious Cultural Contexts: A Gravestone Analysis*, "Journal of Personality and Social Psychology" 119/1 (2020), pp. 1–6, <https://doi.org/10.1037/pspa0000187>.

additionally, also differences in the operationalization and the use of various tools.<sup>14</sup> At the same time, we observe a similarly complicated dynamic in the study of the broader spiritual dimension in the context of functioning in a romantic relationship. The spiritual intimacy of both partners serves as a predictor of strengthening positive and mitigating negative marital attitudes,<sup>15</sup> spiritual intelligence significantly contributes to relationship satisfaction,<sup>16</sup> and spirituality mediates the relation between marital satisfaction and life satisfaction.<sup>17</sup> On the other hand, research by Van Scoy shows that, contrary to expectations, the support provided to a partner by an individual in stressful situations does not act as a mediating factor in the relationship between the individual's spirituality and the partner's psychological aggression.<sup>18</sup> These nuanced connections highlight the multifaceted interplay of religious, spiritual elements, and relational dynamics.

### 1.1. Purpose of the study

According to authors describing the family life cycle, the childless marriage phase is the first phase of the family life cycle, which naturally leads to the next one, that is marriage with children.<sup>19</sup> Although 90% of couples in Western countries declare a desire to have one to three children, social and cultural changes affecting the modern family indicate a change in attitudes towards

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<sup>14</sup> D. Villani et al., *The Role of Spirituality and Religiosity in Subjective Well-Being of Individuals With Different Religious Status*, "Frontiers in Psychology" 10 (2019), p. 1525, <https://doi.org/10.3389/fpsyg.2019.01525>.

<sup>15</sup> K.G. Kusner et al. Sanctification of marriage and spiritual intimacy predicting observed marital interactions across the transition to parenthood, "Journal of Family Psychology" 28(5), (2014), pp. 604–614.

<sup>16</sup> A.M. Rostami, H.C. Gol, *Prediction of marital satisfaction based on spiritual intelligence*, "Procedia-Social and Behavioral Sciences" 116(2014), pp. 2573–2577.

<sup>17</sup> F. Kasapoğlu, A. Yabanigül, *Marital satisfaction and life satisfaction: The mediating effect of spirituality*, "Spiritual Psychology and Counseling" 3(2) (2018), pp. 177–195. doi: 10.12738/spc.2018.3.2.0048.

<sup>18</sup> B.K. Van Scoy, *Length of Marriage, Duration of Faith Commitment, and Religious Coping: Effects on Marital Functioning*. A Dissertation Presented to the Faculty of the Graduate School of Psychology Fuller Theological Seminary, (2012).

<sup>19</sup> M. McGoldrick, E.A. Carter, N. Garcia-Preto, eds., *The Expanded Family Life Cycle: Individual, Family, and Social Perspectives*, 4th ed Boston 2011: US: Pearson Allyn & Bacon.



fertility planning.<sup>20</sup> The result of this is, among others, postponing the decision on parenthood in a specific or not specified time perspective and a prolonged phase of childlessness.<sup>21</sup> Marriages delaying the decision to have a child in the childless phase are rarely the subject of research. However, there are publications showing the relationship between the motivation to have a child and religiosity, and parenthood as a highly desirable natural consequence of marriage in many religions.<sup>22</sup> The social, economic, and cultural causes of prolonged childlessness in married couples are often studied, but little is known about the psychological mechanisms underlying couples' decisions to postpone parenthood.

In our study, we decided to determine the importance of religiosity and dyadic coping with stress, for the well-being of spouses who postpone having children. Following Huber, we define the centrality of religiosity as a personal construct, both in terms of its content and motivational functions.<sup>23</sup> The more that religiousness occupies a central place in the personality structure, the greater its impact on everyday functioning of a person in all areas of his life. The analyses aimed to answer the following questions:

- I. Is there a relationship between dyadic coping with stress and the well-being of spouses postponing the decision to have a child?  
Hypothesis 1 (H1). There is a positive effect of dyadic coping with stress on the well-being of spouses.  
Hypothesis 1a (H1a). The higher own level of dyadic coping with stress, the higher own level of well-being.  
Hypothesis 1b (H1b). The higher the partner's level of dyadic coping with stress, the higher the own level of well-being.
- II. Is there a relationship between religiosity and dyadic coping with stress?
- III. Is there a relationship between religiosity and the well-being of spouses?

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<sup>20</sup> I. Delbaere, S. Verbiest, T. Tydén, *Knowledge about the Impact of Age on Fertility: A Brief Review*, "Upsala Journal of Medical Sciences" 125/2 (2020), pp. 167–74, <https://doi.org/10.1080/03009734.2019.1707913>.

<sup>21</sup> A. Kalus, J. Szymańska, *Psychological Correlates of Family Assessment by Spouses Who Do Not Take Parental Roles during Early Adulthood*, "Czasopismo Psychologiczne" 24/3 (2019), <https://doi.org/10.14691/ CPPJ.24.3.563>.

<sup>22</sup> N. Peri-Rotem, *Religion and Fertility in Western Europe: Trends Across Cohorts in Britain, France and the Netherlands*, "European Journal of Population" 32/2 (2016), pp. 231–65, <https://doi.org/10.1007/s10680-015-9371-z>.

<sup>23</sup> S. Huber, O.W. Huber, *The Centrality of Religiosity Scale (CRS)*, "Religions" 3/3 (2012), pp. 710–24, <https://doi.org/10.3390/rel3030710>.

- IV. Does religiosity modify the relationship between dyadic coping with stress and well-being?
- V. Are there differences in the level of religiosity, well-being and dyadic coping with stress between women and men?

Due to the inconsistent results of research in the area of relationships between religiosity and dyadic well-being and coping, this part of the analysis was exploratory and no hypotheses were made.

## 2. Methods

### 2.1. Participants

The study involved 51 married couples (51 women and 51 men) aged 19 to 43 years. The mean age of women was 28.38 (SD=4.92) and that of men 30.15 (SD=4.80). The length of marriage ranged from one to 15 years (M=2.98; SD=3.24). The respondents lived both in cities (50% in cities with more than 100,000 inhabitants) and in rural areas (26.79%). Most of the respondents had higher education (55.9% of women and 32.2% of men). Most men (83.1%) and women (80.8%) were employed. All couples planned to have children in the near future (up to 3 years) or in the long term (up to 10 years).

### 2.2. Procedures

The study was conducted online using Google Forms. The selection of people was mainly carried out using the snowball method. Each of the spouses separately received a link to the Form, which contained the questionnaire with sociodemographic data, the Dyadic Coping Inventory, the Psychological Well-being Scale, and the Centrality of Religiosity Scale. Participation in the study was voluntary, without remuneration. The subjects were informed about the scientific nature of the study and the possibility to withdraw from the study at any time. This piece of research is not by nature a clinical experiment, and as such it did not need to be adjudicated by the Research Ethics Committee.

### 2.3. Measures

The socio-demographic questionnaire consisted of two parts. In the first, the subject gave informed consent to participate in the study. The second part was used to collect socio-demographic data and included questions regarding parenthood and plans related to it.

Centrality of Religiosity Scale, in the Polish adaptation by Zarzycka, makes it possible to determine the centrality of religiosity, that is, the degree of importance of religious constructs for an individual, and to characterize the level of religiosity on five dimensions: 1) the intellectual dimension, which indicates cognitive involvement in the development of religious content; 2) religious experience, determining how often transcendence is present in the daily experience of a person; 3) private practice, showing the frequency of making contact with transcendental reality and the subjective meaning of personal contact with transcendence; 4) ideology, which means the degree of certainty of the subjects about the existence of the transcendental reality; 5) public practice, indicating the frequency and subjective importance of participation in religious services.<sup>24</sup> The sum of the points obtained in the five scales described above forms the general score, which is a measure of the centrality of religiosity. Depending on the number of points obtained, we can discuss marginal religiosity, heteronomous religiosity and autonomous religiosity. In Polish studies, the Cronbach's  $\alpha$  internal consistency coefficient 0.94.

Dyadic Coping Inventory in the Polish validation is a 37 item-questionnaire, used to assess various forms of coping with stress used by partners in romantic relationships.<sup>25</sup> It consists of five scales that estimate dyadic coping (DC) by self and by Partner: stress communication, emotion-focused supportive DC, problem-focused supportive DC, delegated DC, and negative DC. There are also two scales for common DC: problem-focused common DC and emotion-focused common DC. Respondents mark their responses on a 5-point scale from 1 – very rarely to 5 – very often. The scale reliability at our study was at a satisfactory level of Cronbach's  $\alpha = 0.78$ .

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<sup>24</sup> B. Zarzycka, *Skala Centralności Religijności Stefana Hubera [Stefan Huber's Centrality of Religiosity Scale]*, "Roczniki Psychologiczne" 10/1 (2007), pp. 133–157.

<sup>25</sup> A.M. Wendolowska, D. Czyżowska, G. Bodenmann, *Psychometric Properties and Measurement Invariance of the Polish Version of the Dyadic Coping Inventory*, "Current Psychology" 41 (2022), pp. 1159–1173, <https://doi.org/10.1007/s12144-020-00623-5>.

Psychological Well-Being Scales in Polish validation is a self-report instrument measuring well-being in eudemonistic terms.<sup>26</sup> The questionnaire contains six scales: self-acceptance, positive relationships with others, autonomy, environmental mastery, purpose in life, personal growth. The tool consists of 84 items, which the respondent rates on a 6-point Likert scale, where: 1 means I strongly disagree, and 6 means I strongly agree. The reliability of the tool in our study was satisfactory Cronbach's  $\alpha = 0.64$ .

#### 2.4. Analysis strategies

Means with standard deviation were calculated for all variables. Pearson's correlations were used to test the intercorrelation matrix between the variables, and the *t*-test for dependent samples was used to analyse the gender differences. The actor-partner interdependence model (APIM) was used for the analysis, taking into account the interdependence of dyadic data.<sup>27</sup> All analyses were performed as part of Structural Equation Modelling using the lavaan package. All tests were performed at the significance level of 0.05.

### 3. Results

Means, standard deviations, and the paired *t*-test examining differences between the spouses regarding dyadic coping, well-being and centrality of religiosity are presented in Table 1.

The results of the *t*-test (Table 1) revealed that there were no significant differences between the spouses in terms of psychological well-being. Women obtained significantly higher results than men on the centrality of religiosity and dyadic coping scales.

The spouses' results of dyadic coping and psychological well-being correlate significantly. As for the centrality of religiosity, none of the subscales correlated significantly with either dyadic coping or well-being (Table 2).

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<sup>26</sup> D. Karaś, J. Ciecuch, *Polish Adaptation of Carol Ryff's Psychological Well-Being Scales*, "Roczniki Psychologiczne" 20/4 (2019), pp. 837–853.

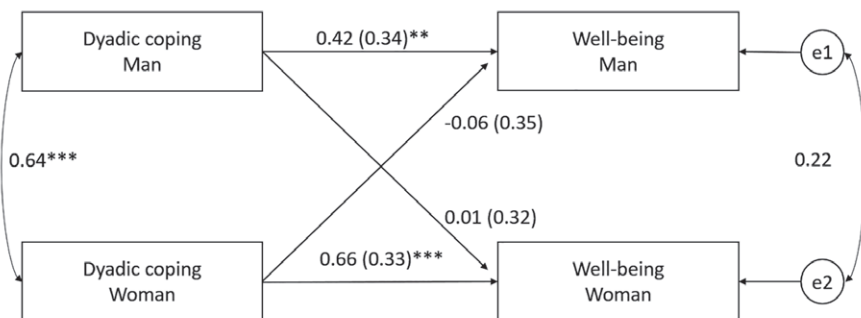
<sup>27</sup> D. Kenny, *Models of Non-Independence in Dyadic Research*, "Journal of Social and Personal Relationships" 13/2 (1996), pp. 279–294, <https://doi.org/10.1177/0265407596132007>.

**Table 1.** Descriptive statistics and gender difference.

	Women		Men		t-test
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	
Dyadic coping	147.29	16.65	142.42	16.51	2.46*
Psychological well-being	400.79	41.93	396.88	35.46	0.61
Intellectual dimension	10.15	3.76	8.08	3.78	4.40***
Ideology	13.69	2.65	11.77	3.77	4.24***
Public practice	10.83	3.50	9.13	3.87	3.58***
Private practice	11.81	2.70	9.83	3.05	4.85***
Religious experience	10.6	3.40	8.35	3.53	4.72***
Centrality of religiosity	57.08	14.07	47.15	16.05	5.43***

*n* = 52 dyads; \**p* <.05; \*\**p* <.01; \*\*\**p* <.001

**Figure 1.** Dyadic coping and well-being of the spouses.



Standardized coefficients ( $\beta$ ), with standard errors in parentheses, are reported; \*  $p < 0.05$ ; \*\*\*  $p < 0.001$ ; rectangles – independent and dependent variables. circles – latent error terms. arrows – actor (each spouse’s dyadic coping effect on his or her own well-being) and partner effects (each spouse’s dyadic coping on his or her partner’s well-being); curved double-headed arrows on the left – covariances between the independent variables; curved double-headed arrow on the right – correlation between the two error terms.

**Table 2.** Intercorrelations between the variables for women (\_A) and men (\_P)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
1 Dyadic coping_A	1															
2 Psychological well-being_A	.66**	1														
3 Intellectual dimension_A	.00	-.03	1													
4 Ideology_A	-.05	.01	.60**	1												
5 Public practice_A	-.04	.06	.74**	.66**	1											
6 Private practice_A	-.01	.11	.77**	.66**	.72**	1										
7 Religious experience_A	.02	.08	.83**	.66**	.69**	.74**	1									
8 Centrality of religiosity_A	-.02	.05	.91**	.80**	.87**	.88**	.90**	1								
9 Dyadic coping_P	.63**	.42**	-.32*	-.20	-.25	-.24	-.22	-.28*	1							
10 Psychological well-being_P	.20	.29*	-.44**	-.34*	-.29*	-.34*	-.30*	-.39**	.35**	1						
11 Intellectual dimension_P	.00	-.04	.59**	.45**	.46**	.62**	.53**	.61**	-.01	-.13	1					
12 Ideology_P	.11	.00	.43**	.53**	.42**	.48**	.43**	.51**	.03	-.16	.68**	1				
13 Public practice_P	.09	.06	.56**	.45**	.57**	.55**	.54**	.61**	.03	-.23	.82**	.64**	1			
14 Private practice_P	.08	-.01	.51**	.34*	.36**	.48**	.40**	.48**	.00	-.17	.83**	.68**	.75**	1		
15 Religious experience_P	.05	.04	.49**	.52**	.39**	.53**	.51**	.55**	-.05	-.14	.82**	.78**	.67**	.78**	1	
16 Centrality of religiosity_P	.07	.01	.58**	.52**	.50**	.60**	.54**	.62**	.00	-.18	.93**	.85**	.87**	.90**	.91**	1

*n* = 52 dyads; \* *p* < .05; \*\* *p* < .01; \*\*\* *p* < .001; Results in bold diagonal font show correlations between the spouses

The members of the dyad were distinguishable by gender ( $\chi^2(12) = 34.21, p = 0.002$ ). The independent variables and moderators were centred by subtracting the mean from all scores. Using the APIM (Table 3, Model 1), the relationship between the dyadic coping and spouses' well-being was analysed (Figure 1). The actor effect for men and for women was found to be statistically significant. Thus, it can be concluded that men and women who score higher in dyadic coping also report higher levels of subjective well-being (H1 partially confirmed). The partner effect was not confirmed, which means that dyadic coping of men and women has no effect on each other's well-being.

**Table 3.** Effects of dyadic coping on psychological well-being of the spouses

	Effects	Estimates	95% CI	<i>P</i>	Beta	<i>R</i>
Model 1	<i>Women</i>					
	Intercept	398.39	389.97 to 406.82	<.001		
	Actor	1.64	1.00 to 2.27	<.001	0.66	0.56
	Partner	0.01	-0.61 to 0.64	.970	0.01	0.01
	<i>Men</i>					
	Intercept	400.37	391.44 to 409.29	<.001		
	Actor	0.87	0.21 to 1.53	.010	0.42	0.33
	Partner	-0.12	-0.80 to 0.56	.728	-0.06	-0.05

In model 2 (Table 4), centrality of religiosity was included into analyses as a within dyad moderator, containing different scores for the two members of the same dyad. When controlling for the covariates, (1) the positive actor effect in women remained significant, (2) the partner effect for women turned out to be significant, (3) the actor effect for men appeared insignificant; (4) a significant partner-actor interaction in women, and (5) significant actor-actor, partner-actor, partner-partner interactions in men (H2 partially confirmed). It means that for more religious spouses (1) the higher own dyadic coping the higher own well-being in women only, (2) the higher dyadic coping in men the lower their wife's well-being, (3) a. the higher dyadic coping and religiosity in men the higher their own well-being; b. the higher wives' dyadic coping and husbands' the lower husband's well-being, c. the higher dyadic coping and religiosity in women the higher well-being in men.

**Table 4.** Effects in the centrality of religiosity moderation model

<i>Model 2</i>	Effect type	Estimate	z-value	Standardized
	<i>Women</i>			
Dyadic coping	Actor	4.20	2.07*	1.67
	Partner	-4.10	-2.07*	-1.61
Centrality of religiosity	Actor	-2.51	-0.53	-0.84
	Partner	-1.52	-0.44	-0.58
Interaction	Actor–Actor	-0.05	-1.48	-2.84
	Actor–Partner	0.01	0.43	0.01
	Partner–Actor	0.07	2.10*	3.49
	Partner–Partner	-0.01	-0.13	-0.01
	<i>Men</i>			
Dyadic coping	Actor	2.83	1.53	1.32
	Partner	-3.55	-1.87	-1.66
Centrality of religiosity	Actor	-6.26	-1.95	-2.83
	Partner	0.85	0.19	0.34
Interaction	Actor–Actor	0.08	2.79**	5.87
	Actor–Partner	-0.03	-1.27	5.51
	Partner–Actor	-0.11	-3.29***	-6.03
	Partner–Partner	0.08	2.73*	-2.43

\*  $p < .05$ ; \*\*  $p < .01$ ; \*\*\*  $p < .001$

## 4. Discussion

The conducted analyses reveal no differences in well-being between men and women. However, gender differences in dyadic coping with stress and the centrality of religiosity were noted. In the case of women, religiosity is more central in their personality structure. The obtained result is consistent with the results of other studies indicating a higher level of religiousness of women compared to men.<sup>28</sup> Women also present higher results in terms of dyadic coping, which

<sup>28</sup> D. Czyżowska, E. Gurba, A. Białek, *Preferencje w zakresie wartości i poziom centralności religijności singli i młodych dorosłych żyjących w związkach* [Value preferences and the level



is also consistent with the results of previous studies.<sup>29</sup> Relationships between dyadic coping and well-being have also been noted. However, no associations were observed between the centrality of religiosity and dyadic coping and well-being.

Although the results of some studies suggest that religiosity may contribute to the good functioning of the marital relationship and translate into well-being of people, in our study the central location of religiosity among other personality constructs is not relevant to the way spouses deal with stressful situations together, and also does not translate into their well-being.<sup>30</sup> It is worth noting, however, that previous research on the relationship between the centrality of religiosity and dyadic coping with stress among Polish couples also did not show such a relationship, either.<sup>31</sup> The lack of relationship may, on the one hand, result from the operationalization of religiosity, and on the other hand, from the specificity of Polish religiosity.

In the adopted Huber's model, we focus on the importance of religion in human life, referring to both religious practices and interest in religious issues and religious experiences. Religiosity is therefore not defined here just by spiritual aspects and personal relationship with God, which could have a greater impact on the way a person functions in life, in relationships, and on his well-being. In our sample, the vast majority of respondents presented heteronomous religiosity (55.8%), which means that they do not attach much importance to religion and may treat it somewhat instrumentally, which may explain the lack of relationship between their religiosity, dyadic coping and psychological well-being. Our result may confirm the results of other studies indicating the importance of the type of religiosity (for example, internal vs. external) for its impact on well-being.<sup>32</sup> Considering that in Polish religiosity considerable emphasis is placed on the acceptance of suffering and enduring the hardships of everyday life, it may

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*of centrality of religiosity of singles and young adults living in relationships*], "Polskie Forum Psychologiczne" 22 (2017), <https://doi.org/10.14656/PFP20170403>.

<sup>29</sup> A. Wendołowska, D. Czyżowska, G. Bodenmann, *Psychometric Properties and Measurement Invariance of the Polish Version of the Dyadic Coping Inventory*.

<sup>30</sup> L. Manning et al., *Spiritual Resilience: Understanding the Protection and Promotion of Well-Being in the Later Life*, "Journal of Religion, Spirituality & Aging" 31/2 (2019), pp. 168–86, <https://doi.org/10.1080/15528030.2018.1532859>.

<sup>31</sup> A. Wendołowska, D. Czyżowska, *Centrality of Religiosity and Dyadic Coping in Close Romantic Relationships*.

<sup>32</sup> D. Villani et al., *The Role of Spirituality and Religiosity in Subjective Well-Being of Individuals With Different Religious Status*.

mean also that religiousness is not a motivating factor towards the improvement of the relationship and raising the level of well-being. Additionally, in the surveyed group, there are couples who clearly postpone having children, which is not necessarily in line with their religion.

Dyadic analyses aimed at determining the importance of partners' dyadic coping for their well-being point to the actor effect, which means that for both women and men, a higher level of dyadic coping is conducive to their higher well-being. However, it was not found that the level of dyadic coping by women and men was significant for the well-being of their spouses. These results indicate that for a person's sense of well-being, his actions and the ability to cope with difficult situations are more important than how the spouse acts. Considering that psychological well-being in the concept of Ryff consists of such aspects as: autonomy, environmental mastery, personal growth, positive relations with others, purpose in life, and self-acceptance, it is not surprising that the subjective sense of well-being is the actions of the person himself and how he copes with stressful situations than the actions of others. It seems that subjectivity and the related sense of agency may be important, which plays an important role in the actions undertaken by an individual, including dyadic coping, and may be important for the sense of autonomy, control over the environment or personal development, which are areas of psychological well-being.<sup>33</sup>

When we study spouses' religiosity, we observe interesting, though varied, effects of dyadic coping on well-being. In women, there is a negative effect of husband's dyadic coping on their own well-being, but in women with a higher centrality of religiosity, the same effect is positive. This would mean that women generally perceive partner's dyadic coping negatively. Perhaps this is related to the construct of well-being discussed above, which is of fundamental importance for women in the context of their autonomy and self-reliance. For the well-being of women, for whom religiosity is central in the structure of their personality, the presence and support of their husband in difficult situations prove to be important for their well-being. More religious women, perhaps in humility towards God, attach less importance to their own self-sufficiency and read the partner's support and help positively as a good deed, which translates into their higher well-being. These results can also be explained in the context of the traditional patriarchal family model, in which the wife leans on her husband and appreciates his efforts while being weak and submissive herself. In the

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<sup>33</sup> C.D. Ryff, *Happiness Is Everything, or Is It?*

case of men with a higher centrality of religiosity, we observe that the factors which have a positive effect on their well-being, are more religious wives and higher dyadic coping of both spouses. At the same time, surprisingly, more religious wives and higher self-dyadic coping have an overall negative effect on men's well-being.

The results indicate that for more religious women, their husband's dyadic coping translates into their well-being. For religious men, their dyadic coping as well as and their wife's dyadic coping and their wife's religiosity affect their own well-being. Congruence between spouses in religiosity is a factor that increases satisfaction.<sup>34</sup> Dyadic coping in a religious context may become a value convergent with the principles of faith. If the partners' religiosity is not on a similar level, then it can become a factor leading to discord and conflict.<sup>35</sup>

In developed countries, having children is often motivated by the desire to increase life satisfaction or the need for personal development.<sup>36</sup> Well-being, mainly in the aspect of personal development or life goals, seems to be particularly important in relation to couples planning to conceive a child in the near or beyond. It seems that the religious compatibility of the spouses is extremely important for planning offspring, but also in the later process of raising a child. At every stage of marital life, dyadic competences are extremely important for the quality of the relationship and for one's own well-being. Dyadic coping is a predictor of reduced conflicts between spouses, including those related to parenting, buffers stress related to taking on parental roles and improves adaptation to fulfilling parental tasks.<sup>37</sup>

The acquired results seem to shed new light on the importance of dyadic coping by spouses and their religiosity for well-being of each of them. They also encourage further research leading to a fuller understanding of the inter-relationships between them.

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<sup>34</sup> J. Śliwak et al., *Religijność a Komunikacja w Małżeństwie [Religiosity and Communication in Marriage]*, "Kultura – Media – Teologia" 30 (2017), pp. 184–209.

<sup>35</sup> W.R. Burr, L.D. Marks, R.D. Day, *Sacred Matters*, New York 2012, US: Routledge, <https://doi.org/10.4324/9780203641323>.

<sup>36</sup> I. Delbaere, S. Verbiest, T. Tydén, *Knowledge about the Impact of Age on Fertility*.

<sup>37</sup> P.R. Tutelman et al., *A Longitudinal Examination of Common Dyadic Coping and Sexual Distress in New Parent Couples during the Transition to Parenthood*, "Family Process" 61/1 (2022), pp. 278–93, <https://doi.org/10.1111/famp.12661>.

## 5. Strengths and limitations

Dyadic analyses and a rarely-studied sample of spouses who postpone decisions about having children, are the strengths of the presented study. However, the conducted research also has its limitations, which probably affected the results obtained and the possibility of drawing conclusions based upon them. First of all, one should pay attention to the relatively small number of respondents. At this point, however, it should be noted that obtaining both spouses for research is always a challenge for researchers. Secondly, the examined couples differed in age and marital history, which may be significant for the level of the examined variables and their interrelationships. It is also important for the way of experiencing childlessness and openness to having children. For some couples, childlessness is a natural phase of the family, for others it means postponing the decision to have children, which may lead to the realization that the chances of having children are rather slim.

In subsequent studies, it would be important to include a greater number of married couples, as well as a larger number of spouses presenting an autonomous and marginal type of religiosity. This would allow one to monitor the importance of autonomous and heteronomous or marginal religiosity for the spouses' dyadic coping and for their well-being. A larger group, differentiated in terms of the length of the relationship and the age of the spouses, would allow one to determine the importance of these variables for dyadic coping and well-being. It would also be interesting to examine relationship satisfaction, in the context of spouses' religiosity and dyadic coping with stress, and its importance for the well being of the spouses.

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## **Social Media and Body Image from the Perspective of Secondary School Youth**

### **Abstract**

The study aimed to map the prevalence of social media disorder in secondary school youth. We used an abbreviated version of the Social Media Disorder Scale (SMD) and the Body Shape Questionnaire (BSQ-16B). The reliability of the questionnaires used in the research, indicates that they have sufficient internal consistency. A total of 637 respondents participated in the study. Their ages ranged from 15 to 19 years (AM=16.63). The results of the study showed social media impairment in 11.1% of the respondents, confirming a statistically significant difference in terms of the gender of the adolescents in favour of girls, and in terms of the degree of concern about their appearance, in favour of those who are more concerned about their appearance. Furthermore, a statistically significant difference in the degree of concern about their appearance in terms of gender, was confirmed in favour of girls.

### **Keywords**

social media disorder, social media, secondary school youth, body image

## 1. Introduction

Social media is perceived differentially by many authors.<sup>1</sup> Meikle<sup>2</sup> characterises social media as the Internet and networked communication platforms, that enable both personal and public communication. This definition fits with social media platforms, such as Facebook or Instagram, which have become mainstays of popular culture. The use of social media is steadily increasing, with the number of social media users reaching 4.65 billion in April 2022.<sup>3</sup>

Social media has become an essential part of our lives. They play an important role in the lives of young people, who are the first generation to be in daily online contact with their peers through social media. The Slovak Youth Report<sup>4</sup> states that young people on the threshold of 2018 are the first generation to fully use information and communication technologies and mobile communication from early childhood.

Undoubtedly, social media offer tremendous benefits to society by providing access and connection to people, services, information and opportunities that would not otherwise be possible. However, there is evidence, particularly in the field of adolescent mental health, of an association between social media use and higher depression and anxiety scores, poor sleep, low self-esteem, and body image concerns.<sup>5</sup>

Body image has become essential to mental health, self-esteem and well-being. In Western society, images of often-unattainable body ideals pervade films, magazines, television advertisements and social media sites, with these images generally reflecting photographs of thin idealised women.<sup>6</sup>

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<sup>1</sup> C. Fuchs, *Social Media: A Critical Introduction*, London 2017, Sage.

<sup>2</sup> G. Meikle, *Social Media: Communication, Sharing and Visibility*, New York 2016, Routledge.

<sup>3</sup> <https://www.statista.com/statistics/617136/digital-population-worldwide/> (30.12.2023).

<sup>4</sup> Správa o mládeži, IUVENTA – Slovenský inštitút mládeže, 2018, p. 40.

<sup>5</sup> Y. Kelly, A. Zilanawala, C. Booker, A. Sacker, *Social media use and adolescent mental health: findings from the UK millennial cohort study*, "EClinical Medicine" (2018), 6, pp. 59–68; Royal Society For Public Health, *Status of Mind: Social Media and Young People's Mental Health and Wellbeing*, 2017.

<sup>6</sup> A.L. Cory, S.R. Burns, *What did she say? An examination of the influence of conversation and media exposure on participant's body objectification and anxiety*, "Psi Chi Journal of Undergraduate Research" (2007) 12(3), pp. 97–103.

Body image has become so familiar in the Czech and Slovak languages, that it is usually neither abbreviated nor translated.<sup>7</sup> Under the term, it is possible to imagine body image, self-conception and body concepts perceived by us and the environment. The term body image was introduced in the 1930s by the Austrian neurologist and psychiatrist Paul Schilder, who defined the term body image as the image of our own body that we form in our mind.<sup>8</sup> Since body self-image is usually defined as an attitude towards one's body, we can distinguish its cognitive, emotional and behavioural aspects.<sup>9</sup> The cognitive side includes the idea of the dimensions of the body as a whole, the dimensions of its individual parts and their relation to each other. The affective components represent the relationship to one's body as a whole, its individual parts, and the relationship to one's physicality in general. And under the behavioural domain, fall all activities that are directed towards influencing our appearance (e.g. exercise, plastic surgery, dieting, etc.).<sup>10</sup>

As the most widespread form of mass communication, social media has influenced society in many ways in recent decades. The media are the only source of what the public sees and are directly responsible for the content presented to people through them. Unfortunately, the media has also become a mediator of sociocultural values that directly affect ideas about ideal body shape and size.<sup>11</sup> There are many different media types; therefore, how they influence people varies. These include newspapers, magazines, books, movies, radio, television, and the Internet.<sup>12</sup>

Several researches have been conducted which reveal that for both women and men, the perception of their own body is associated with negative feelings, and social media significantly contributes to this. The media is a transmitter

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<sup>7</sup> L. Fialová, *Body Image jak součást sebepojetí člověka*, Praha 2001, Karoinum, p. 270.

<sup>8</sup> S. Fischer, J. Škoda, *Sociální patologie. Závažné sociálně patologické jevy, příčiny, prevence, možnosti řešení*, Praha 2014, Grada Publishing, a.s., p. 232.

<sup>9</sup> K. Fialová, *Body Image jak součást sebepojetí člověka*, Praha 2001, Karoinum, p. 270.

<sup>10</sup> D. Stackeová, *Tělesné sebepojetí v kontextu psychosomatiky a možnosti jeho ovlivnění*, 2007.

<sup>11</sup> M. McCabe, K. Butler, C. Watt, *Media influences on attitudes and perceptions toward the body among adult men and women*, "Journal of Applied Behavioural Research" (2007) 12(2), pp. 101–118.

<sup>12</sup> K.E. Mulgrew, D. Volcevski-Kostas, *Short term exposure to attractive and muscular singers in music video clips negatively affects men's body image and mood*, "Body image" (2012) 9, pp. 543–546.

of sociocultural values regarding ideal body shape and size, creating the idea of the perfect woman and man.<sup>13</sup> In the issue at hand, there is increasing debate about whether male and female bodies portrayed in the media are a risk factor for negative body self-image.

A study by van den Eijnden, R. J. J. M., Lemmens, J. S., & Valkenburg, P. M. was a pilot study to investigate the validity and psychometric properties of the Social Media Disorders Scale. This study<sup>14</sup>, with more than 1000 adolescents (aged 10–17) in the Netherlands, found that the prevalence of social media disorders, as determined by the diagnostic cut-off point of the 9-item scale, ranged from 7.3% to 11.6% in 3 online samples.

The authors Ergun and Alkan conducted the first study to establish the association between social media disorder and ostracism. The study was conducted on a research sample of 864 adolescents aged 14–18. The reported study found a positive correlation between ostracism and social media disorder. Males who were not academically successful had no hobbies and scored high on the social media disorder scale, scored high on the ostracism scale.<sup>15</sup>

Another research conducted on the issue at hand was research to find out the relationship between social media disorder and loneliness. The research results showed that 107 (23.7%) respondents were classified with social media use disorder.<sup>16</sup>

Our study aimed to map the prevalence of social media disorder among secondary school youth and to analyse the level of concern about their appearance among secondary school pupils. We set the following research problem: *What are the risks of social media use in secondary school youth?*

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<sup>13</sup> M. McCabe, K. Butler, C. Watt, *Media influences on attitudes and perceptions toward the body among adult men and women*, "Journal of Applied Behavioural Research" (2007) 12(2), pp. 101–118.

<sup>14</sup> R.J.J.M. van den Eijnden, J.S. Lemmens, P.M. Valkenburg, *The Social Media Disorder Scale*, "Computers in Human Behavior" (2016) 61, pp. 478–487.

<sup>15</sup> G. Ergun, A. Alkan, *The Social Media Disorder and Ostracism in Adolescents: (OSTRACA-SM Study)*, "Eurasian J Med" (2020) 52(2), pp. 139–144.

<sup>16</sup> L. Youssef, R. Hallit, N. Kheir, S. Obeid, S. Hallit, *Social media use disorder and loneliness: any association between the two? Results of a cross-sectional study among Lebanese adults*, "BMC Psychology" (2020) 8, Article number: 56.

## 2. Materials and Methods

Based on the theoretical and empirical background, we set the following research hypotheses:

H1: We hypothesise that there is a statistically significant difference in the prevalence of Social Media Disorder regarding the gender of secondary school youth in favour of girls.

H2: We hypothesise that there is a statistically significant difference in the prevalence of social media disorder regarding the degree of concern about one's appearance in favour of those who are more concerned about their appearance.

H3: We hypothesise there is a statistically significant difference in the degree of concern about one's appearance regarding the gender of secondary school youth in favour of girls.

The empirical research design was quantitative in nature, with the application of a research battery consisting of the following scales: Body Shape Questionnaire (BSQ-16B) and Social Media Disorder Scale (SMD), supplemented by demographic items.

The Body Shape Questionnaire (BSQ-16B) is a questionnaire about the level of concern reading one's body image, designed to measure worries about body shape and weight. The original 34-item questionnaire (BSQ<sub>34</sub>)<sup>17</sup> was later adapted into a 16-item questionnaire (BSQ-16B)<sup>18</sup>, and we use this abbreviated version in our research. The questionnaire outcome is a measure of concern with respect to one's appearance. Each item has a score of 1 to 6 with 'never' = 1 and 'always' = 6, and the total score is the sum across the 16 items, that is, a range of scores from 16 to 96. Based on this score, the respondent can be placed into one of four categories: less than 38 = no concern about their appearance; 38 to 51 = slight concern about their appearance; 52 to 66 = slight concern about their appearance; above 66 = strong concern about their appearance.

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<sup>17</sup> P.J. Cooper, M.J. Taylor; Z. Cooper; C.G. Fairburn, *The development and validation of the body shape questionnaire*, "International Journal of Eating Disorders" (1987) 6(4).

<sup>18</sup> C. Evans, B. Dolan, *Body Shape Questionnaire: derivation of shortened "alternate forms"*, "International Journal of Eating Disorders" (1993) 13(3), pp. 315–321.

The Social Media Disorder Scale (SMD) is a short and straightforward scale for diagnosing social media addiction and is designed to detect social media disorders.

The SMD consists of nine yes/no questions about feelings with respect to social media. The items reflect the diagnostic criteria for social media addiction, which were based on the criteria for digital gaming addiction, according to the DSM-5 characteristics. The number of affirmative responses is counted in the scoring. The authors<sup>19</sup> state that respondents have a social media disorder if they answer yes to five or more questions. Social media disorder is a behavioural addiction associated with depression, loneliness, narcissism, low self-esteem, poor sleep quality, and low academic performance.<sup>20</sup>

We drew a sample consisting of N=637 respondents using convenience sampling. We distributed the questionnaires electronically from November 2021 to February 2022. There were 414 girls and 223 boys in the study sample. The mean age of the pupils was 16.63 years.

Statistical data analysis was performed using SPSS Statistics 22.0 for Windows statistical software. We carried out a comparative analysis. We used non-parametric tests such as the Mann-Whitney U test and Chi-square test of goodness-of-fit, to identify statistically significant differences and relationships between variables, as the variable did not show the normality of distribution for the population and each subset.

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<sup>19</sup> R.J.J.M. van den Eijnden, J.S. Lemmens, P.M. Valkenburg, *The Social Media Disorder Scale*, "Computers in Human Behavior" (2016) 61, pp. 478–487.

<sup>20</sup> G. Ergun, A. Alkan, *The Social Media Disorder and Ostracism in Adolescents: (OSTRACA-SM Study)*, "Eurasian J Med" (2020) 52(2), pp. 139–144.

### 3. Results

**Table 1.** Describing variables in the context of social media disorder – contingency table

No		Social media disorder		Total
		Yes		
Gender	<b>Boy</b> n % in G % in SMD	207 92.8% 36.6%	16 7.2% 22.5%	223 100.0% 35.0%
	<b>Girl</b> n % in G % in SMD	359 86.7% 63.4%	55 13.3% 77.5%	414 100.0% 65.0%
N <b>Total</b> % in G % in SMD		566 88.9% 100.0%	71 11.1% 100.0%	637 100.0% 100.0%

Legend: G=gender; SMD=social media disorder

**Table 2.** Comparison of boys and girls from the aspect of social media disorder

G	n	CHí2	p
<b>Boys</b>	223	5.464	0.019
<b>Girls</b>	414		

Legend: G=gender; n=number of participants in the group, CHí2=Chi square test, p=statistical significance

Table 1 shows a significant gender difference in the prevalence of social media disorder in favour of girls. It is further evident from Table 2 that there is a statistically significant difference in social media disorder between boys and girls at the significance level of  $p \leq 0.05$  ( $p=0.019$ ). Thus, within our research sample, social media disorder is more common in girls than boys. 7.2% of boys and 13.3% of girls have social media disorders.

**Table 3.** Difference in prevalence of social media disorder regarding the level of concern about one's appearance

	Social media disorder does not occur (n=566)		Social media disorder occurs (n=71)		Mann-Whitney U test	
	Mdn	SD	Mdn	SD	U-test	p
<b>Level of concern about one's appearance</b>	25.00	6.535	43.00	4.072	14,111.000	0.000***

Legend: n=number; Mdn=median; SD=standard deviation; U=test-hodnota Mann Whitney U-test; p=statistical significance

Table 3 shows that there is a statistically significant difference at the  $p \leq 0.001$  ( $p=0.000$ ) level of significance between secondary school pupils who have social media disorders and those who do not, in terms of concern about their appearance. This shows that in our research sample, those secondary school pupils who have social media disorders are more concerned about their appearance.

**Table 4:** Difference in the level of concern about their appearance regarding the gender of the pupils surveyed

	Boys (n=223)		Girls (n=414)		Mann-Whitney U test	
	Mdn	SD	Mdn	SD	U-test	p
<b>Level of concern about one's appearance</b>	26.00	18.913	38.00	22.664	30,626.000	0.000***

Legend: n= number; Mdn=median; SD=standard deviation; U-test=hodnota Mann Whitney U-test; p=statistical significance

Based on the research results from Table 4, we can conclude that  $H_3$  is confirmed. There is a statistically significant difference between boys and girls in the level of concern about their appearance at the significance level of  $p \leq 0.001$  ( $p=0.000$ ). Girls are more concerned about their appearance than boys.



## 4. Discussion

The study aimed to map the prevalence of social media impairment and to analyse the level of concern about one's appearance among secondary school pupils.

Social media disorder was present in 71 respondents (11.1%), with a higher proportion of girls (n=55) than boys (n=16). There is a statistically significant difference in social media disorder between boys and girls at  $p \leq 0.05$  level of significance ( $p=0.019$ ). The tendency to addictive behaviour was also confirmed in their study, by the authors Lašek, Kalibová and Andršová<sup>21</sup> – the more the pupils used the Internet, the more they were at risk of developing an addiction to it and also the tendency to use or abuse it on a daily basis. We also observed a statistically significant difference in the degree of concern about their appearance at the significance level  $p \leq 0.001$  ( $p=0.000$ ) in favour of girls. At the same time, more significant concern about their appearance is experienced by those secondary school pupils who have social media disorders. Based on our research findings, we can conclude that social media disorder may be associated with concerns about one's appearance in addition to depression, loneliness, narcissism, low self-esteem, poor sleep quality, and low academic performance.<sup>22</sup>

Social networking sites are now dominant among adolescents and differ from traditional media, in that they may exacerbate the association between media exposure and body image. Due to the popularity and availability of technology in the form of smartphones, young people can connect to social networks constantly, which also increases their exposure to content that reinforces perceptions of the ideal body image.<sup>23</sup>

Users also have more control over what content they watch on social networks. They can 'follow' certain people they know in real life (for example, friends and classmates), but also various celebrities and famous people. Correlational studies in the field have shown that spending time on social media, higher emotional engagement with technology, and engaging in activities that

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<sup>21</sup> J. Lašek, P. Kalibová, J. Andršová, *Adolescents and Information and Communication Technologies: Use and a Risk of Addiction*, "The New Educational Review" (2016) 44, pp. 72–83.

<sup>22</sup> G. Ergun, A. Alkan, *The Social Media Disorder and Ostracism in Adolescents: (OSTRACA-SM Study)*, "Eurasian J Med" (2020) 52(2), pp. 139–144.

<sup>23</sup> M. Anderson, J. Jiang, *Teens, social media & technology*, "Pew Research Center", máj 31, 2018.

involve following and posting photos on social media, are associated with higher levels of dissatisfaction with one's body.<sup>24</sup>

Adolescence is the time when concerns about body image, precisely in the face of ongoing changes, peak, especially in young women.<sup>25</sup> For adolescents, their own body becomes a particular object of concern.<sup>26</sup> Adolescents also tend to compare their bodies to their peers' physical qualities and the currently accepted ideal of beauty.<sup>27</sup> Concerning the issue at hand, we consider it essential to mention the research findings of Wadden et al.<sup>28</sup>, which concluded that one of the most critical concerns in the lives of adolescent girls is precisely worrying about their figure.

Physical body image is significantly more important for women's self-esteem than for men.<sup>29</sup> Self-esteem is an important part of the psyche and, if low, can be a factor in the development of mental illness. Not meeting self-measures of the 'optimal' is psychologically challenging for women and can lead to depression or anxiety. Taking care of one's appearance is typically expected of a woman.

Adolescents spend a lot of time on social media, not only just posting photos and videos of themselves, but also liking and commenting on other people's photos and videos. When posting their photos, adolescents pay close attention to their physical appearance, and their photos or videos are often filtered and edited in a variety of ways. This reflects the social networking environment, which predominantly presents an appearance that is difficult to obtain and which is often unrealistic. These false portrayals create a gap between what young social media users actually look like and what they think they should look like, which can cause body image and self-esteem issues. The way adolescents

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<sup>24</sup> G. Holland, M. Tiggemann, *A systematic review of the impact of the use of social networking sites on body image and disordered eating outcomes*, "Body image" (2016), 17, pp. 100–110.

<sup>25</sup> S. Grogan, *Body image: psychologie nespokojenosti s vlastním tělem*, Praha 2000, Grada Publishing a.s., p. 184.

<sup>26</sup> E. Mistrík, *Sejčová, L. Dobrý život a kult tela*, Bratislava 2008, Album, p. 145.

<sup>27</sup> M. Vágnerová, *Vývojová psychologie. Dětství a dospívání*, Praha 2012, Univerzita Karlova v Praze, p. 536.

<sup>28</sup> S. Grogan, *Body image: psychologie nespokojenosti s vlastním tělem*, Praha 2000, Grada Publishing a.s., p. 184.

<sup>29</sup> J.F. Sowislo, U. Orth, *Does Low Self-Esteem Predict Depression and Anxiety? A Meta-Analysis of Longitudinal Studies*, "Psychological Bulletin" (2013) 139 (1), pp. 213–240.

perceive their physical appearance contributes significantly to their self-esteem, especially for young women.<sup>30</sup>

Young people who have a negative image of their body image are likely to feel more comfortable interacting socially with other people in a virtual environment where they can create their ideal self. A social network profile can often be accompanied by the careful creation of an image and reputation, in order to create an ideal digital self. People often present their ideal self on Facebook<sup>31</sup> and the same can be assumed for other social networking platforms.

Based on the research findings, we recommend that schools strengthen the area of healthy lifestyle prevention through the school's professional staff, or reach out to counselling and prevention centres that offer a variety of prevention activities which are focused on self- and body image, mental health or healthy lifestyle.

Digital technologies are also increasingly impacting the quality of family relationships, as highlighted in a report published on [www.common sense-media.org](http://www.common sense-media.org) entitled *The New Normal: Parents, Teens, Screens, and Sleep*<sup>32</sup> Research findings show that up to 52% of parents admit to spending too much time using digital technology, 62% of parents and 29% of parents use digital technology in the late evening, which also determines poorer quality of their sleep.<sup>33</sup>

Padilla-Walker, LM, Coyne, SM, Fraser, AM (2012), in their study entitled *Getting a High-Speed Family Connection*<sup>34</sup>, found that excessive use of mobile phones in the family, watching TV together and playing video games are associated with higher quality family relationships, and conversely, engagement on social networking sites is associated with lower quality family relationships,

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<sup>30</sup> S. Steinsbekk, L. Wichstrøm, F. Stenseng, J. Nesi, B. Wold Hygen, V. Skalická, *The impact of social media use on appearance self-esteem from childhood to adolescence – A 3-wave community study*, "Computers in Human Behavior" (2021), p. 114.

<sup>31</sup> S. Zhao, S. Grasmuck, J. Martin, *Identity Construction on Facebook: Digital Empowerment in Anchored Relationships*, "Computers in Human Behavior" (2008) 24 (5), pp. 1816–1836.

<sup>32</sup> <https://www.common sense-media.org/research/the-new-normal-parents-teens-screens-and-sleep> (30.12.2023).

<sup>33</sup> *The New Normal, Parents, Teens, Screens, and Sleep*, 2019.

<sup>34</sup> L.M. Padilla-Walker, S.M. Coyne & A.M. Fraser, *Getting a high-speed family connection: Associations between family media use and family connection. Family Relations: An Interdisciplinary*, "Journal of Applied Family Studies" (2012) 61(3), pp. 426–440.

as indicated by studies by authors such as Radesky, JS, Miller, AL, Rosenblum, KL, Appugliese, D., Kaciroti, N., Lumeng, JC (2015).<sup>35</sup>

Therefore, in this context, they emphasize the need for a harmonious family environment between parents and children, communication between family members that strengthens the parent-child bonding relationship. Positive parent-child relationships, mutual trust and concern for the child, and spending time together can act preventively in the context of risky behaviours online.

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<sup>35</sup> J.L. Radesky, A. Miller, K.L. Rosenblum, D. Appugliese, N. Kaciroti, J.C. Lumeng, *Maternal mobile device use during a structured parent-child interaction task*, “Acad Pediatr” (2015) Mar–Apr., 15(2), pp. 238–244.

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# **Volunteering and Catholicism in Europe. The Inside Perspective**

## **Part 2: Empirical**

### **Abstract**

In the paper we analyse the social activity practices of Catholic persons, as a set of individual and collective action emerging from the Catholic identity and – to more or less extent – structuralised under the Church-related formal non-profit initiatives. The purpose of the study is to clarify: (1) to what extent the Catholic unpaid social activities of different kinds could be classified as forms of volunteering and (2) to what extent the third sector definitions of volunteering are included in specific Catholic activities. Three tendencies have been observed with respect to not including religion-oriented volunteering in voluntary studies. Firstly, while using tools for collecting data adequate for the secular world, researchers face methodological difficulties to successfully cover social activities organized in parishes and congregations. Secondly, a reductionist approach reflects the ideological-rooted tendency to treat religion as a matter of private life. Thirdly, some religious-based entities tend to keep social activities of the believers within the Church-related circle. From the Catholic perspective, volunteer engagement represents an important aspect of faith-based every day activities, the so-called lived religion. At the same time, social engagement of believers provided within the Church-related entities, as well as outside them, usually fulfils all main features of volunteering.

The relation between volunteering and religion is to be referred not only to the general position of faith-based and religious organizations in the public sphere, but also to the embeddedness of religious life in the society, as in fact both religion and volunteering are categories social *per se*. We illustrate our reflection on volunteering and Catholicism by presenting empirical evidence from the 2018 panel expert research among representatives of 29 Catholic Bishops Conferences across Europe.

### **Keywords**

volunteering, civil society, Catholicism

## **1. Methodology and theoretical frame**

The Council of Bishops' Conferences of Europe (CCEE) was established in 1971 with the approval of the Vatican. The members of CCEE are the Bishops' Conferences of Europe, represented by their presidents. Throughout its history, the CCEE has organized numerous initiatives, conferences and publications that promote Catholicism in Europe. It is made up of thirty-nine members that, all together, represent the Catholic Church in forty-five countries in the European continent. The Secretariat of CCEE is based in St. Gallen (Switzerland). In 2018, the Council of Bishops' Conferences of Europe (CCEE), under the presidency of cardinal Angelo Bagnasco, organized a plenary assembly in Poznań (Poland) from the 13–18 September 2018, on the topic entitled "Solidarity and voluntary service". The central goal of the assembly was to present and discuss 29 country working reports based of the research designed by one of the authors of this paper (Wojciech Sadlon).

The 'panel method' invited individual experts to respond to an analysis of the country's data, local specific situation of Catholic volunteering and to present a regional perspective on Catholic volunteering. Experts shared their experiences and viewpoints. Semi-structured questionnaires formulated in six languages (English, French, German, Italian, Spanish and Polish) included open questions that the Secretary of the Council of Bishops' Conferences of Europe sent to all members of the Conference. The questionnaire was introduced by short citations from the Pope Francis' speech to volunteers in 2016 and the Pope Benedict's XVI speech to the European volunteers on behalf of this European Year of Volunteering. The questionnaire included twenty nine open questions concerning the following topics: (1) basic facts such as statistics and



legislation concerning Catholic volunteering; (2) historical development of the Catholic contribution to volunteering in the country; (3) the attitude towards cultural context of Catholic volunteering such as individualism and indifference; (4) motivations of Catholic volunteering both in Catholic community and to the needs of non-Catholics; (5) the relationship between faith and volunteering; (6) the interrelationship between Catholic volunteering, evangelization and Catholic pastoral work. Special focus was placed on Catholic youth volunteering, and the questions distinguished between formal and informal volunteering.

The questionnaire was officially distributed in March 2018 by the Secretariat of CCEE. Until July 2018, the following participated in the panel: 27 European Bishops' Conferences representing 29 European countries. Individual Bishops' conferences designated representatives of the country – both clergymen and laymen experts – who collected data and formulated answers. They presented the way in which Catholic social activities are defined in their countries by Catholic actors (perspective of agents). Their opinions and reflections have been collected as the package of working (non-published) country reports (CR).

In our analysis of the collected data, we use the concept of agency and reflexivity elaborated by Margaret Archer. In this perspective, Catholicism represents both cultural system (ideas, theological concepts) and socio-cultural interactions motivated by reflexively elaborated religious experience. Both systems actively shape individual biographies and life projects. In this perspective Catholics become actors if they find their roles in which can “invest themselves” as actors “acquire their social identities from the way in which they personify the roles they choose to occupy.”<sup>1</sup> The Realist approach developed the model of the human person as first a ‘self’, then a ‘primary agent’, a ‘corporate agent’ and an actor. Progressive elaboration by which the human self gradually comes to acquire a social identity includes three phases: (1) the development of primary agency in which society ‘impinges upon’ the human self; (2) the development of corporate agency in which primary agents collectively transform themselves in seeking to transform society and (3) the development of social actors in which social transformation affects the social roles and potential social identities.<sup>2</sup>

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<sup>1</sup> M.S. Archer, *Being Human: The Problem of Agency*, Cambridge 2000, Cambridge University Press, p. 261.

<sup>2</sup> M.S. Archer, *Being Human: The Problem of Agency*, Cambridge 2000, Cambridge University Press, p. 260.

In this perspective, Catholic agential powers are conditioned by the socio-cultural context and actively elaborated in the relationship to this context. Structural context includes both Catholic elements such as Catholic institutions and organizations, as well as religious or even anti-religious elements of the cultural system in late modernity. Catholicism emerges in the interplay between agency of Catholics and socio-cultural structures of modern pluralistic and secularized societies. In late modernity the “morphostatic synchrony between structure and culture” crumbles and new powerful promotive interest groups arise. “More and more groups acquire the characteristics of Corporate Agency – namely organization and articulation.”<sup>3</sup> “In sum, these are the proliferation of more and more Corporate Agents, whilst Primary Agency not only shrinks accordingly, but eventually becomes residua and disparate in composition.”<sup>4</sup> As a consequence the ‘matrix’ of competing and diverging Corporate Agents occur with high level of interaction and search for structural and cultural advancement. In addition, Catholic interest groups become involved in cultural interaction.

Under such formatted analytical perspective we decided to focus the qualitative analysis of 29 country reports on three cross-sectional issues: inside perspective of defining Catholic volunteering by Church authorities and engaged believers, links between faith and volunteering, and (reconstructed) institutional approaches to volunteering formulated by Church authorities in specific legal and environmental conditions.

## 2. Defining Catholic volunteering – the inside perspective

Throughout Europe, Catholics perform volunteer actions in various forms which manifest as a result of the way in which Catholic organizations operate. The definition of volunteering reconstructed from 29 country reports is also extended to very religious activity. In some countries volunteering is reduced rather to social work, however, most often, volunteering involves most fields of pastoral work, not only social but also in parishes or even in liturgy.

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<sup>3</sup> M.S. Archer, *Being Human: The Problem of Agency*, Cambridge 2000, Cambridge University Press, p. 288.

<sup>4</sup> M.S. Archer, *Being Human: The Problem of Agency*, Cambridge 2000, Cambridge University Press, p. 288.

In Italy, “there are no pastoral areas which are not covered by volunteering” (CR Italy). In Portugal, “usually volunteers are available to give support in all the areas they are needed. Therefore, they are engaged in all the pastoral work, side by side with the local clerical communities” (CR Portugal). For example, the Catholic Church in Belgium recruits volunteers throughout the year in order to drive pastoral missions or provide ‘temporal’ services (relationship, management, advice, etc.). A wide range of activities is offered in various services (Youth Ministry, catechesis, pastoral care of health, funerals, management activities, works administrative, human resources, law, communication, computer science, management, etc.), including diversity of qualification availability of individuals (CR Belgium). In Luxembourg, parish catechesis, based on a structured curriculum, was introduced in September 2017. In a good part of the parishes, the catechists are supported by volunteers. This type of volunteering mainly involves parents who accompany their children and who will probably remain active only for the catechetical time of their children (CR Luxembourg). In the Netherlands, volunteers act also within as governance and administrative assistance of the Catholic organizations, such as dioceses and parishes (CR Netherlands). Specific model of Church-State relations in France shapes very extensive commitment of non-professional and unpaid laymen in pastoral activity. The presence of volunteers is significant in areas related to education: movements such as scouting, or the parish activity: catechesis and even chaplaincy, not to mention helping migrants or elderly people (CR France).

Despite different historical and political configurations, in Germany, volunteers participate also in wide range of religious activity, especially in the liturgy. Country experts point put the presence of volunteers not only in the catechesis and social work areas, but also in the liturgy, and list such forms of Catholic volunteers: ministers, lectors, Eucharistic assistants and even God’s Word Office (CR Germany). In Switzerland, volunteers “are involved almost everywhere, except specific Church services (e.g. sacristans)” but there “is a consensual distinguish between volunteering and services which are remunerated by parish councils” (CR Switzerland).

Besides, in English-speaking European countries and societies, the engagement of volunteers is very complex. In Scotland, despite the fact that “often advancing in age and not always enjoying the desired level of formation for the tasks entrusted to them” and that “many parishes would note a difficulty in finding young people to volunteer, which is linked to the generally-low level of young people attending Mass”, the activity of volunteers is not limited to social

work. “We depend on volunteers for every aspect of pastoral work and almost all parishes enjoy a reasonable number of volunteers” (CR Scotland). In the Republic of Ireland, Catholics labelled as ‘volunteers’ operate within Catholic forms of “social work; they work with migrants, care of the elderly, and there is good evidence of volunteering as part of pastoral work” (CR Ireland) despite the fact there is no tradition of volunteers in catechesis in Ireland.

In Central and Eastern part of Europe – despite different historical configuration of the Church and society and state relationships – the scope of volunteering forms of activity within Catholic organizations, is also very extended. In Lithuania, “we have lot of volunteers when they are called to short-term volunteering and less long term volunteers” (CR Lithuania). In Slovakia, Catholic volunteers operate within “University pastoral centres, Missions centres among Romani people, Youth movements, Pre-matrimonial courses, partially in social work. For example, many volunteers are serving during National Youth Meeting (e.g. Prešov 26–29 July 2018). Some institutions or congregations (e.g. Caritas, Salesians) have a special programme for missionary volunteers (lay people). After finishing this program/formation, volunteers can go do missionary work (for couple of months, for 1 year, or 2 years)” (CR Slovakia). However, catechists at schools and the majority of social service workers in Caritas are reimbursed professionals in Slovakia. In Slovenia, “volunteering is well developed in the field of youth ministry, pastoral care in preparation for confirmation, musical groups, assistance to the elderly and families in difficulty as well as at the level of parish Caritas” (CR Slovenia). In Belarus, “volunteering is particularly present when undertaking and organizing pastoral campaigns – youth days, celebrations in sanctuaries, etc. Also, volunteers help priests in activities concerning care for the elderly in organizing The Day Of The Sick, etc.; in some parishes, volunteers work in catechesis and work social” (CR Belarus). In Bulgaria, “at the parish level, especially in pastoral work, parish priests organize various initiatives involving volunteers representing all age groups. In the life of the Church in Bulgaria, all those who give their concrete contribution to the life of the parish do it as voluntary work: catechists, the choir, the sacristans, participation in social actions (for example volunteers who help the Sisters of Mother Teresa), the support of the parishioners in need. Moreover, diocesan and national meetings for young people, volunteers, catechists and others are an element that helps motivation and formation to volunteer work” (CR Bulgaria). According to our data in Greece, Moldova and Ukraine volunteering is also present in all spheres of pastoral activity.

Such an extended understanding of volunteer work within Church activity triggers the important question concerning the border line between religious and non-religious forms of volunteering. Our reports highlight that it is not possible to draw the border line between the two fields, as according to our experts, 'Catholic volunteering' represents also an opportunity for evangelization. Non-Catholic persons who volunteer in Catholic organizations, especially young people, come to Catholic organizations searching for spirituality. "There are non-Catholics who engage in volunteering within Catholic organizations. Those young people usually are searching for their spirituality, supporting Catholic values (helping others, supporting others, loving your family and friends) and following their example, looking for like-minded people, wanting to feel useful for others, to gain new, valuable skills and personal qualities, to try themselves in different situations" (CR Lithuania). Some experts claim that volunteering is, *per se*, a form of evangelization. "In our secularized society, the actors of evangelization are the people transformed by the encounter with God who incites hope and charity. Catholic volunteering is already in itself a form of evangelization in this sense that it represents an act of love" (CR Belgium); "The need for a coherence between faith and life, between the words of the Gospel and everyday life makes the link between evangelization and commitment natural" (CR Italy). Others point out that volunteering is not naturally evangelization. "Evangelization from the point of view of volunteering work is not a priority, but it is not excluded that some volunteer activity may lead to a more profound life of faith" (CR Hungary). "The risk of transforming the Catholic volunteer into a social worker is high" (CR Moldova). Others claim that there is even an advantage in evangelization through volunteering. "Catholic volunteering probably offers more opportunities for deepening the faith life of the volunteers rather than directly evangelising" (CR Scotland).

Although, particularly in Western countries, 'Catholic volunteering' attracts older people, it represents a very important part of youth ministry. "Youth ministry in Slovenia has incorporated volunteering as a founding element" (CR Slovenia). Many Western countries offer well-organized volunteering programs for youth in these countries. Some experts indicate challenges for youth pastoral ministry in relations to volunteering. For example, in Spain: "We believe that youth ministry in recent decades has suffered, in general, a drift on the one hand, excessively 'sacramentalist' which has guided it to receive the sacrament of Confirmation and that, in some dioceses, has made it happen immediately after of the First Communion, with result in disappearance

of Youth Ministry. On the other hand, it has had a very doctrinal drift with a small dimension of socio-charitable pastoral” (CR Spain). “The role of liturgy and sacramentality seems important to re-establish in pastoral youth ministry” (CR Switzerland).

In some cases, it is pointed out that the practical link between volunteering and faith is too weak. “One might hope for a greater link between faith and volunteering. Some religious orders that carry out important services in the community (e.g. provision of soup kitchens), observe that often people that volunteer for this service might not have any formal link to faith or the Church. They also note that few religious vocations emerge from among their volunteers” (CR Ireland).

### **3. Link between faith and volunteering**

According to experts, the relationship between volunteering and faith is also complex. Especially in countries where religion is pluralised, volunteering delivers an opportunity for ecumenism. Some experts indicate that commitment to volunteering corresponds with commitment to religious community and is implied by Catholic ethics. “The promotion of volunteering is based on the link between personal and community faith and acceptance of the suffering person, image of Christ” (CR Italy). In this light, the promotion of volunteering expresses also the commitment to Catholic community. “The primary motivation for volunteering in an ecclesial context is to contribute to the mission and to experience ‘something’ within the Church. Volunteering should be supplied with a new spirit to give it durability. More meaningful recognition of the work of the volunteers could foster their trust and their belonging to the Church. A new missionary impulse could stem from their motivation” (CR Belgium). “The majority of volunteering in the Church arises from a clear Christian commitment in favour of the poor and an identification with the preferential option of Jesus in favour of the poor” (CR Spain). “We believe that by engaging in volunteering service a young person will be able to feel the essence of being a part of community and find his way to trust God. Also, this could help him to realize the sense to his activities, feel needed and find his own place in Catholic Church” (CR Lithuania).

Volunteering also causes specific formative effects and contributes even to personal and spiritual fulfilment. Catholic volunteering in comparison to secular

forms, is “more oriented to personal development” (CR Poland). “Being a volunteer is a ‘gift, service or call’ as volunteering is at the heart of the commitment of Christians (...) To be a volunteer in the Church is to answer a call related to a specific need of the Church, it is a service for the Church. The volunteer responds to his vocation as baptized, he takes part in the mission of the Church, he is at the service of the ecclesial community” (CR France). It means that volunteering positively contributes to the social role of the Church: “This increases the recognition of the Catholic Church and its institutions and the impact of their activity on social assistance” (CR Hungary). Faith is also an important motivation for volunteering. That is why it is often mentioned that volunteering has theological foundations. In some European countries, it is stated that volunteering represents a form of apostolate or even ‘as implementation of the Gospel’.

In some cases, it is pointed out that the practical link between volunteering and faith is too weak. “One might hope for a greater link between faith and volunteering. Some religious orders that carry out important service in the community (e.g. provision of soup kitchens), observe that often people who volunteer in this service might not have any formal link to faith or the Church. They also note that few religious vocations emerge from among their volunteers” (CR Ireland). On the other hand, volunteering is a platform for encounter between Catholics and non-Catholics. There are many Catholics who are engaged in ‘non-Catholic volunteering’. There are also non-Catholics who volunteer in Catholic organizations. They are attracted by the positive image of the Church or just by practical issues. However, generally, there is no competition between Catholic and non-Catholic volunteering. That is why volunteering represents a form of inter-religious dialogue and ecumenism. “For example, the *Restos du cœur*, an association founded by Coluche, is an example of a collective commitment involving all types of people. What motivates the commitment of volunteers is the mission: food aid for the poorest and most vulnerable. Whatever the type of volunteering in the public or private sphere, the latter is aware of contributing to the society of his country in a voluntary, free and according to his competence” (CR France). Generally, volunteering is associated with the wide spectrum of motives, from more psychological motives such as joy and pleasure, to much more theological motives, such as ‘call’ and ‘mission’.

However, while non-Catholic volunteering is more oriented to meeting people and experiencing joy (CR Germany), Catholic motivations for volunteering are much more theological: “love for the Church and, Christian charity” (CR Albania). Becoming a volunteer is a way of responding to Evangelical ‘new

commandment' of love and charity and "personal sanctification" (CR Ukraine). Sharing faith is also a factor organizing charitable and *pro bono* volunteering activities of the believers. Especially in Eastern and Central Europe, the specificity of Catholic volunteering in comparison to 'secular' forms consists in the fact that Catholics do not expect any forms of remuneration while volunteering (eg. CR Kosovo, Macedonia, Montenegro, Serbia). Volunteering is also a 'space' for prayer and spiritual activity (CR Bosnia and Herzegovina).

This impact of a religion on social life may be classified as direct or indirect, as believers may involve themselves in services-delivering activities collectively or individually, and – as has already been mentioned – their social engagement may be openly bound with manifestation of faith or separated from it. "The motive to volunteer in an ecclesiastical environment is of course connected with the religious conviction of the volunteer. In voluntary work in an ecclesiastical environment, more attention will be paid to questions of faith and belief than in general voluntary work" (CR Netherlands).

#### **4. Institutional approach to volunteering**

According to the experts who conducted the research, in Western countries, volunteering is well-institutionalized. State and public programs stimulate the growth of volunteering. On the other hand, there is a risk of 'mercantilization' of volunteering, which means detaching volunteering from spontaneous activity and subordinating to programs and individual career path. Volunteering was stimulated by the financial crisis in 2007 and recently by refugees' crisis. An ageing society is emphasizing the role of informal volunteering. Volunteering in Europe is also a platform for international cooperation. 'Old democracies' stimulate the development of volunteering in 'new democratic' countries.

In some countries such as Portugal, Slovenia, Germany and France, special ecclesiastical documents on volunteering were published. In countries such as Poland, Ukraine, Switzerland, Spain, there are no published documents, but volunteering is mentioned by individual bishops. In other countries, the Catholic Church refers to volunteering by supporting practical initiatives. There are still some countries which do not refer directly to volunteering. Western countries 'export' good practices to 'new democracies': "In the Communism time volunteering was compulsory. Nowadays, thanks to the good example of many



volunteers who came (and still come) from abroad, especially from Italy, many have learned the meaning and value of volunteering” (CR Albania).

According to the panel experts, Church authorities are characterized by a strong positive attitude towards volunteering. Volunteering is also well appreciated within Catholic Church. Furthermore, in recent years, volunteering in Europe is dynamically increasing. Such a positive trend is observed not only in ‘old democracies’, but also in ‘Post-Communism countries.’ “Profound changes in volunteering. Despite increasing individualism and indifference, generally volunteering grows” (CR France). “Recent changes worth mentioning might be the growth in the numbers of young people volunteering” (CR Scotland).

There are also some symptoms of the past tensions and ideological conflicts between the Catholic Church and some official politics concerning volunteering in the Post-Communist countries. “People are more open to volunteering. Before political change in 1989 voluntary work was obligatory (e.g. ‘Communist Saturdays’). Recently, the number of volunteers is increasing, but it is much lower than in Western European countries. There are governmental initiatives to promote volunteering, such as Volunteering Council, including also delegates from Churches and charitable organizations (eg Caritas Maltese)” (CR Hungary). “We can see that the volunteer’s number is increasing year by year. Every year, we see more people concerned and involved in specific projects or causes” (CR Portugal).

The institutional attitude of the Catholic Church towards volunteering results also from the political transformation in Eastern and Central Europe: “Volunteering was inaugurated in 1992 when Slovenia was transformed from totalitarianism to democracy. In the socialism period the organized volunteering within the Church was not allowed. The number of volunteers, NGOs and time dedicated to volunteer is growing” (CR Slovenia). “Volunteering in Lithuania is expanding. Volunteering is achieving more and more interest not only among young people but among adults as well. After the adoption of Law on Volunteering in 2011, it has led to the broader and deeper interest of a society in understanding of benefits which volunteer work brings to the nation, country and a person himself. There is a growing interest in volunteering among students and volunteering is awarded in education” (CR Lithuania). “There is a great enthusiasm to voluntary work in the public sphere. Various “community gardens” are creating. Many volunteers are participating in developments projects. A Day of voluntary work is organized in civil society (or Week of volunteering) by civil institutions, or by NGOs” (CR Slovakia). “Despite the lack of state support / interest, volunteering is developing and growing in Bulgaria” (CR Bulgaria).

“Voluntary attitudes are proliferating. Especially in urban regions, at schools and universities” (CR Moldova).

The impact of political context on volunteering activity and religious motivations, is very evident in the Ukraine. The exceptional situation of the Ukraine consists in the fact that volunteer activities of Catholics contributes to military operations. “Volunteering has been no more than slightly developed in comparison to other countries. In 2010 Ukraine was characterized by the lowest rate of volunteering in the world (5%). Revolution of Dignity, the annexation of the Crimean Peninsula and the war in the Donetsk Basin area has the situation a lot. Revolution of Dignity on the Maidan was strongly supported by volunteers. The inhabitants of Kyiv have shown the example of a wonderful self-organization to achieve their main goal which was to change Ukraine and make it a European state. After the Revolution and at the beginning of military aggression in the eastern part of the Ukrainian state, we are witnessing the extraordinary growth of the voluntary movement. Almost half of Ukrainian volunteers began to participate in volunteer projects in the period 2013–2014. The most important result of the Revolution, apart from the understanding of the need for the construction of a state based on law was the growing consciousness of the volunteering as integral part of a civil society. It will not be an exaggeration to say that thanks to the volunteers, in 2014, our country has managed to defend its independence, has stopped the Russian invasion in the East Ukrainian, renewed its military forces with a spirit of fortress and courage.” (CR Ukraine).

In some Central Eastern Europe countries experts highlight the need for institutional and legislative background for Catholic volunteering: “The number of volunteers has increased, young people are eager to volunteer. There is a need of legal status of volunteering” (CR Belarus). “In the last decade, there has been an evident increase in the number of volunteer activities, organized or self-initiated actions. People are more sensitive to the needs of others and express them by volunteering and engagement. The volunteering laws partially define voluntary commitments both volunteer organizers and volunteers themselves. There are also difficulties in enforcing the law and meeting the legal framework (volunteer application, health insurance costs and the like)” (CR Bosnia and Herzegovina).

The opposite situation takes place in Western-Europe. Especially in ‘old democracies’ volunteering is being transformed into more project oriented and casual (drop-in) engagement. In these countries volunteering is also shaped by the increasing professionalization. “General voluntary work in the

Netherlands has not changed in recent years. The number of Catholic volunteers working in Catholic parishes declines annually by approximately 0.1 percentage point” (CR Netherlands). “It is difficult to get new volunteers in some organisations” (CR Ireland). Also the problem of bureaucratization “the move amongst many large non-Catholic charities to use professional fund-raisers, often impacting on the perceived trustworthiness of the charities. Safeguarding protocols and Health & Safety Regulations have also changed the scenario and atmosphere around volunteering” (CR Scotland).

## 5. Conclusions

The relation between volunteering and religious values is to be referred not only to the general position of faith-based and religious organizations in the public sphere, but also to the embeddedness of religious life in the society. Just taking into account all societal aspects, we may see how complex the relation between religion and volunteering is. In fact, both categories are social *per se*. Tendencies were observed with respect to not including religion-oriented volunteering in voluntary studies, and research may indicate three main reasons. Firstly, researchers may face significant difficulties in order to successfully cover the world of social activities organized in parishes and congregations when they use tools and networks for collecting data adequate for the ‘pure secular’ world. Secondly, a reductionist approach in volunteering research may reflect ideologically-rooted secular tendency to treat religion as a matter of private life of people. In such an approach, religious practices are shifted from the public sphere to the private sphere, but societal and community-based expressions of religious life are also ignored. Thirdly, we also observed a tendency in religious institutions and entities to keep social activities of the believers inside the church-related world.

We tried to discuss all interpretative aspects of the Catholic volunteering and illustrate our reflection by using data from panel expert research among representatives of 29 Catholic Bishops Conferences across Europe. From a critical realist perspective, religious activity invokes reality and shapes the everyday social life of believers: indirectly and directly.<sup>5</sup> Even personal, fully private

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<sup>5</sup> D. Porpora, M.S. Archer, A. Collier (eds.), *Transcendence: Critical Realism and God*, London 2004, Routledge.

religious practices as different forms of individual praying, worship or meditations, have an impact on social behaviour of the believers through shaping their attitude towards family members, friends, neighbours, colleagues from workplaces etc. Such an impact of religion on social life may be classified as being indirect (or hidden). But religious life cannot be reduced to individual practices. Some important aspects of religious life are social *per se*. Religious beliefs are manifested through social activities. Attending Holy Mass or visiting a mosque is religious, but also social behaviour. Believers of all main religions (with maybe one important exception of Buddhism, which is more individually-oriented) tend to organize religious practices within vital communities: to create a sphere for praying together, sharing common values, and undertaking collective action. Such community-based religious and religious-oriented practices shape social life in a direct way. Religious community-based events are just a part of social life. It has to be added that the necessity of bridging religious practices *sensu stricte* with social activities is announced in religious moral teaching.<sup>6</sup> What is more, religions cover a mission of proclaiming their Good News (as it is called in Christianity) to non-believers, which implies activity in the public sphere, not only in the private one.

Catholic volunteering emerges at each of four levels as *self*, the *person*, the *agent* and the *actor*. Human beings are ‘stratified’, meaning that their identity emerges in the interplay between social structure and agency, which represent different properties and powers or – expressing it more precisely – “independent properties, capable of exerting autonomous influences.”<sup>7</sup> Catholic activity emerges in the relational interplay between personal religious experience and both religious and social institutions. The specificity of Catholic volunteering is reflexively shaped as religious identity and a person’s commitment to religious communities that refers to theological concepts, symbols and material traits as a religious cultural heritage. “The efficacy of this mediatory mechanism is entirely activity-dependent; that is reliant upon what agents make of these contexts.”<sup>8</sup> This sort of religious experience as human concern is vested in certain projects (career, family, community, club or church). Catholics invest themselves

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<sup>6</sup> A. Collier, *On Christian Belief. A Defence of a Cognitive Conception of Religious Belief in a Christian Context*, London 2013, Routledge.

<sup>7</sup> M.S. Archer, *Realist Social Theory*, Cambridge 1995, Cambridge University Press, p. 6.

<sup>8</sup> M.S. Archer, *Being Human: The Problem of Agency*, Cambridge 2000, Cambridge University Press, pp. 268–269.

in these social projects that “are susceptible of emotionality, in relation to society’s normative evaluation of our performance in these roles.”<sup>9</sup> Catholic activity emerges in relationship to the institutionalized Catholic norms and is provided always within the social context. From the perspective of Catholic Church, ‘Catholic volunteering’ represents a very important aspect of Catholic life in Europe, because it accumulates not only dynamic social forces, but also relates to religious experience and every day so-called lived religion. The distinctiveness of ‘Catholic volunteering’ results from the Catholic identity, Catholic doctrine and Catholic moral principles. It includes also the context of the Catholic Church as institutions incorporating, in a particular way, trust.

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<sup>9</sup> M.S. Archer, *Being Human: The Problem of Agency* (DOI: 10.1017/CBO9780511488733), Cambridge 2000, Cambridge University Press, p. 219.



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## **La giurisprudenza come fonte del diritto canonico Jurisprudence as a Source of Law**

### **Abstract**

Starting with such a provocative title, the essay aims to answer the question of whether jurisprudence can be considered as a source of law in the canonical judicial system. In order to achieve the objectives of the present work, it is proposed not to observe a traditional path followed by those who interpret the provision of canon 19 of the current Code of Canon Law, but rather to consider jurisprudential creativity which represents, in its various manifestations, an unavoidable feature of legal experience. This premise helps to reconsider the source concept of law and systematizes the role of jurisprudential doctrine in the hierarchy of sources in the canonical legal system.

### **Keywords**

theory of law, source of law, jurisprudence, jurisprudential creativity, hierarchy of law

## 1. Introduzione

Parlando della giurisprudenza in termini di fonte del diritto, senza chiarire cosa si intenda per fonte del diritto, si rischia di banalizzare questa tematica e di arrivare a conclusioni fuorvianti. In verità, l'argomento 'fonti del diritto' nell'ordinamento canonico è un tema complesso a cui, tramite le pagine che seguono, si desidera offrire un nuovo contributo partendo dai presupposti non subito rinvenibili da un tradizionale cammino dottrinale già percorso da tanti.<sup>1</sup> La via alternativa che si aspira a seguire omette il diretto riferimento alla disposizione normativa del can. 19 CIC/1983 in cui, il legislatore ha già disciplinato che la giurisprudenza avesse il ruolo dello *ius suppletorium*, a condizioni espressamente indicate nella stessa fonte normativa.<sup>2</sup> Il presente lavoro prospetta invece una comprensione inerente alle diverse ramificazioni del tema considerando come opportuno lo sviluppo, perlomeno teorico, del fenomeno della creatività giurisprudenziale canonica, senza addentrarsi nella problematica relativa al contenuto normativo del canone citato o al precedente vincolante in quanto argomento ancora non determinato dalla dottrina.<sup>3</sup> Per battere questa

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<sup>1</sup> Cfr. M. Nuzzo, *Norma scritta e attività creativa della dottrina e della giurisprudenza: riflessioni sulle fonti del diritto privato*, in: Aa.Vv., «*Lex et ius*» nell'*utrumque ius: radici antiche e prospettive attuali*. Atti del VII Colloquio internazionale romanistico-canonistico (12–14 maggio 1988), Città del Vaticano 1989, Libreria Editrice Vaticana, pp. 419–432; T. Mauro, *Le fonti del diritto canonico dalla promulgazione del Codex fino al Concilio Vaticano II*, in: T. Mauro (ed.), *Scritti di diritto ecclesiastico e canonico*, t. I, Padova 1991, EUNSA, pp. 15–82; P. Lombardía, *Las fuentes del derecho en el proyecto del nuevo Código*, en: P. Lombardía (ed.), *Escritos de derecho canónico y de derecho eclesiástico del Estado*, t. IV, Pamplona 1991, EUNSA, pp. 563–581; J. Otaduy, *Fuentes del derecho*, in: J. Otaduy, A. Viana, J. Sedano (eds.), *Diccionario General de Derecho Canónico*, t. IV, Navarra 2012, Thomson Reuters Aranzadi, pp. 119–124.

<sup>2</sup> Sul ruolo della giurisprudenza canonica ai sensi del discorso qui avanzato: F. Finocchiaro, *La giurisprudenza nell'ordinamento canonico*, in: *La norma en el Derecho Canónico*. Actas del III Congreso Internacional de Derecho Canónico, Pamplona, 10–15 de octubre de 1976, vol. 1, Pamplona 1979, EUNSA, pp. 113–132; J.I. Arrieta, *Il valore giuridico della prassi della Curia Romana*, «*Ius Ecclesiae*» 8 (1996) 1, pp. 97–117; E. Baura, *Riflessioni sul valore canonico della giurisprudenza*, in: J. Kowal, J. Llobell (eds.), «*Iustitia et iudicium*». *Studi di diritto matrimoniale e processuale canonico in onore di Antoni Stankiewicz*, vol. III, Città del Vaticano 2010, Libreria Editrice Vaticana, pp. 1387–1406.

<sup>3</sup> Cfr. G. Comotti, *Il valore del precedente giudiziale nella tradizione canonica*, in: U. Vincenti (ed.), *Valore dei precedenti giudiziari nella tradizione europea*, Padova 1998, CEDAM, pp. 81–104; E. Baura, *Il valore normativo del precedente amministrativo e giudiziale*, in: Gruppo Italiano Docenti di Diritto Canonico (ed.), *Unità e pluralità della normativa ecclesiale*, Quaderni della Mendola 28, Milano 2021, Glossa Ed., pp. 113–131.



traiettorie e non rischiare di far un discorso meramente suggestivo, occorre espletare un'analisi concettuale di questioni sottostanti a questa tematica, in piena concordanza con teorie ormai fortemente presenti nel mondo giuristico.

## 2. Creatività giurisprudenziale

Si parte con una contestazione che l'attività giudiziaria insieme al diritto giurisprudenziale sono espressioni corrispondenti al medesimo fenomeno caratterizzato da una costante interpretazione del diritto da parte dei suoi operatori. È connaturale al chiarimento normativo una qualunque attività giudiziaria tesa ad esplicitare la *ratio* normativa per una migliore sussunzione espletata in modo da condizionare, perlomeno per sommi capi, la sentenza. La creatività della giurisprudenza rappresenta dunque un dato ineliminabile di ogni esperienza giuridica, pur manifestandosi in maniera diversa.

Nonostante la mancanza della precisa e felice terminologia, in dottrina si separa la creatività nel senso semantico (interpretativo) da quella pragmatica qualora la stessa sia un prodotto di un ragionamento giudiziale.<sup>4</sup> In primo caso, si dà per certo il fatto che il giudice può attribuire al materiale normativo un senso diverso da quello linguisticamente ovvio. Nel secondo caso invece, si ha a che fare con una ipotesi in cui ci si chiede se una decisione giurisprudenziale, o un considerevole numero delle pronunce pur simili nella fattispecie, possano produrre l'efficacia vincolante in modo da condizionare le future sentenze con qualche grado di cogenza. In altre parole: altro è chiedersi se un giudice possa uscire fuori dai significati concettuali impiegati nella fonte normativa (e fino a che punto) e poi interpretare in tal senso la norma in maniera estensiva,<sup>5</sup> altro è invece considerare l'attività decisionale, sia individualmente che collettivamente, come fonte del diritto. Come asserito, per giungere ai nostri obiettivi, ci interessa per il momento la prima ipotesi della creatività giurisprudenziale, che può essere innovativa ed eterodossa ma non nel senso di imporsi autorevolmente ad altri giudici a fronte di un simile stato fattuale. Un orientamento della

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<sup>4</sup> Cfr. R. Pardolesi, G. Pino, *Post-diritto e giudice legislatore. Sulla creatività della giurisprudenza*, "Il Foro Italiano" 5 (2017), p. 118.

<sup>5</sup> Cfr. Giovanni Paolo II, *Discorso in occasione dell'inaugurazione dell'anno giudiziario della Sacra Rota Romana*, AAS 76 (1984), p. 648; C. Begus, *Jurisprudencia de la Rota Romana*, in: J. Otaduy, A. Viana, J. Sedano (eds.), *Diccionario General de Derecho Canónico*, t. IV, Navarra 2012, Thomson Reuters Aranzadi, p. 921.

giurisprudenza può risultare particolarmente innovativo rispetto ad una formulazione semantica del dettato normativo<sup>6</sup> senza escludere che tale ragionamento può essere considerato altamente persuasivo, ma non particolarmente cogente.

Da quanto fin qui sommariamente esposto, emerge che la creatività dell'interpretazione giurisprudenziale, in senso semantico/interpretativo, appartiene all'essenza dell'attività giudiziaria poiché l'interpretazione è sempre in qualche modo creativa. In definitiva, l'ordinamento canonico, come ogni altro sistema giuridico che si ispira al diritto codificato, incoraggia i giudici ad esercitare forme più o meno intense di creatività, siccome oltre le norme, all'intero delle stesse si aggiungono clausole generali, principî di diritto, concetti indeterminati/elastici<sup>7</sup>, nozioni aperte, termini che si lasciano impiegare solo nel contesto dell'equità canonica o dell'*epikeia*<sup>8</sup> secondo quanto enuncia il brocardo *placuit in omnibus rebus præcipuam esse iustitiæ æquitatisque quam stricti iuris rationem*.<sup>9</sup> Tali concetti, che in sede legislativa sono stati lasciati intenzionalmente in sospenso, sono stati rimessi alla determinazione degli interpreti, documentano come il legislatore permette l'esistenza di varie forme di creatività delegata/autorizzata *ope legis*, dato che nessun autore di norme possa dettagliatemenne prevedere e regolare tutte le ipotesi nel vasto contesto del vissuto sociale. Infine, la creatività così pensata è una dimostrazione di saggezza legislativa e di una tecnica tesa ad una programmazione di una migliore organizzazione ecclesiale.

Ciò posto, si noti che tanti dei testi normativi, data la loro immediata indeterminatazza, richiedono una attività creativa in modo che, da vari frammenti del sistema giuridico,<sup>10</sup> si giunga ad una costruzione del quadro prescrittivo pieno e sufficiente, capace di esaurire, quanto alla sua normazione, il contenuto delle ipotesi possibili. Detta creatività deve essere esercitata entro i limiti

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<sup>6</sup> Cfr. R. Guastini, *Interpretare, costruire, argomentare*, "Osservatorio sulle fonti" 2 (2015), pp. 7–8.

<sup>7</sup> Cfr. J. Miras, J. Canosa, E. Baura (eds.), *Compendio di diritto amministrativo canonico*, Roma 2007, EDUSC, p. 71.

<sup>8</sup> Cfr. M. Żurowski, *Cechy charakterystyczne prawodawstwa kanonicznego w świetle posoborowych tendencji*, "Prawo Kanoniczne" 10 (1976) 3–4, pp. 16–19; R. Sobański, *Nauki podstawowe prawa kanonicznego. Teoria prawa kanonicznego*, Warszawa 2001, UKSW, pp. 130–133.

<sup>9</sup> Cfr. A. Dębiński, K. Burczak, M. Jońca, *Łacińskie sentencje i powiedzenia prawnicze*, Warszawa 2018, C.H. Beck, p. 205.

<sup>10</sup> Cfr. G. Pino, *Interpretazione e «crisi» delle fonti*, Modena 2014, Mucchi Ed., p. 143.

stabiliti dalla scienza giuridica e cioè il suo risultato non può attribuire agli enunciati normativi dei significati che potrebbero generare decisioni ingiuste, assurde o prive di logicità. In ogni ordinamento, infatti, esiste, e deve esserci, un margine di interpretazione creativa o, semplicemente è lecito essere creativi, poiché il processo ermeneutico implica molteplici scelte che non sono mai dettagliatamente disciplinate dallo stesso ordinamento. Il risultato di tali scelte, composto tramite varie tecniche ed esperienze (inclusa quella di via negativa) deve svolgersi entro i principi/limiti guida, pur giuridicamente accettabili ed argomentabili. La creatività interpretativa dunque deve essere svolta non con una discrezionalità assoluta e svincolata, piuttosto esercitata con la libertà ad essa dovuta, secondo gli standard pacificamente ereditati dalla tradizione giusteoria.

In definitiva, il vero problema non è esercitare la creatività ai sensi del discorso di cui sopra, piuttosto è capire quanta creatività possa essere ammessa entro i limiti determinati dalla scienza giuridica e, di conseguenza, dalla prassi. Di certo, è un dilemma appartenente ad un vasto campo di scelte istituzionali che la Chiesa fa tramite la determinazione del suo ordinamento; è il problema che coinvolge il contenuto di base incluso in ogni disposizione legale. Infine, detta difficoltà riguarda i valori sottostanti a vari modelli della formazione di giudici (inclinazione formalista o sostanzialista<sup>11</sup>). In ogni caso, è impensabile raffigurare il giudice come un rilevatore della *mens legislatoris*, dallo spirito dell'ordinamento o come uno che si impegna in un'attività priva di scelte in un'analisi etico-istituzionale.

### 3. Nozione giuridico-formale di fonte del diritto

Adeguandosi a quanto rilevato, è utile soffermarci sulla creatività in senso pragmatico/produttivo, partendo da un immediato chiarimento della giurisprudenza intesa come fonte del diritto.

In primo luogo, per fonte del diritto si può intendere un insieme degli atti e dei provvedimenti a cui l'ordinamento canonico riconosce *explicite* una capacità innovativa dell'ordinamento stesso. Questa accezione del fonte del diritto, quanto agli ordinamenti *civil law* statali, si rinviene dal catalogo contenuto negli

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<sup>11</sup> Cfr. P.S. Atiyah, R.S. Summers, *Form and Substance in Anglo-American Law: A Comparative Study of Legal Reasoning, Legal Theory and Legal Institutions*, Oxford 1987, Clarendon Paperbacks, p. 145 e seguenti.

atti normativi più significativi,<sup>12</sup> sebbene, nelle famiglie giuridiche che si ispirano alla tradizione romano-germanica, per definizione, la giurisprudenza non può essere considerata come fonte del diritto.<sup>13</sup>

A differenza degli ordinamenti statuali, nel sistema codiciale canonico non esiste una costituzione promulgata che potrebbe essere considerata un atto normativo più rilevante al quale ogni atto di minor valore gerarchico dovrebbe adeguarsi.<sup>14</sup> Vi è pure la mancanza di un esplicito riferimento normativo che indichi, pur in maniera generica, non solo le fonti, ma anche la loro corretta gerarchia. Tuttavia, questi dati possono essere dedotti sia tramite i tratti comuni degli ordinamenti appartenenti al sistema *civil law* sia attraverso i principî sottostanti alla scienza canonica.

Per complicare questo quadro, occorre dar notizia che, di fatto, la gerarchia delle fonti di produzione normativa canonica, ai sensi di una nozione schiettamente formale, genera più problemi e difficoltà non solo perché, a differenza degli ordinamenti laici, [a] non esistono titolari esclusivi della potestà legislativa, ma anche si nota [b] l'inesistenza del procedimento inerente alla formazione di leggi analoghe a procedure minuziosamente determinate dai legislatori statuali. Quanto alla [c] nomenclatura delle leggi, nel sistema canonico non esiste la loro unica intitolazione, causa molteplici ragioni storiche e quelle direttamente derivanti dalla sua tradizione. Infine, [d] soggetti investiti della potestà vicaria possono partecipare con la potestà propria alle prerogative spettanti ad un soggetto titolare dell'ufficio capitale, creando così seri problemi affini, qualora da parte del titolare di un ufficio capitale avvenga l'approvazione in via amministrativa di quanto deciso dal titolare di potestà vicaria.<sup>15</sup>

Indipendentemente dai problemi qui segnalati, rileva che è la stessa concezione primaria che è riconosciuta alla legge, essendo essa stessa la prima fonte del diritto nel senso giuridico-formale del concetto 'fonte'. La legge abbraccia la totalità dell'ordine giuridico e forma il suo scheletro che riceve la vita, ma in larga misura da altri fattori. Non deve essere considerata soltanto nel suo testo,

<sup>12</sup> Cfr. art. 1 preleggi del Codice civile italiano.

<sup>13</sup> Cfr. P. Gallo, *Introduzione al diritto comparato. Vol. I: Grandi sistemi giuridici*, Torino 2001, Giuffrè Ed., p. 287; R. David, C. Jauffret-Spinozi, *I grandi sistemi giuridici contemporanei*, Padova 2004, CEDAM, pp. 113–114.

<sup>14</sup> Cfr. J.M. González del Valle, *Las lagunas en el ordenamiento canónico y jerarquía de fuentes*, "Fidelium Iura" 6 (1996), pp. 80–81.

<sup>15</sup> Cfr. J. Otaduy, *Jerarquía normativa*, in: J. Otaduy, A. Viana, J. Sedano (eds.), *Diccionario General de Derecho Canónico*, t. IV, Navarra 2012, Thomson Reuters Aranzadi, pp. 864–865.

autonomamente dai procedimenti, spesso molto estensivi, impiegati per la sua interpretazione e nei quali si rivela il potere creativo della giurisprudenza e della dottrina. Le riflessioni che seguono confermeranno che la giurisprudenza è un esercizio di potestà del governo ed è condizionata da vari presupposti, non solo d'indole schiettamente giuridica, che spesso non vengono espressamente dichiarati, pur essendo ben visibili.

#### 4. Accezione 'culturale' di fonti del diritto

All'estremo opposto, rispetto alle fonti del diritto intese nella chiave puramente formale, si dà la loro nozione in senso 'culturale' indicando quanto 'non-giuridico' potrebbe influire alla decisione del giudice.<sup>16</sup> Queste circostanze però non possono essere desunte da un insieme di regole sottostanti al processo deliberativo. In dottrina<sup>17</sup>, pur riconoscendo alla giurisprudenza il ruolo della fonte del diritto, si è anticipato, sebbene solo in via teorica, di formulare i rischi da correre nell'ipotesi di accogliere tra le fonti la giurisprudenza costituita da fattori d'indole culturale. Una volta accettato un tale concetto di fonte, esso correrebbe il rischio di essere privato di un valore scriminante rispetto ai diversi fattori e circostanze che, a vario titolo, possono condizionare le pronunce definitive. Tra i vari elementi immaginabili che potrebbero rilevare, si possono indicare: le opinioni e le convinzioni soggettive prive di un oggettivo confronto, i pregiudizi di vario tipo (non esclusi quelli razziali), l'appartenenza a cerchi sociali emblematici per la propria visione del mondo. Nonostante il rispetto verso le diversità e le sensibilità culturali dell'*orbe catholico*, è palese che tale intendimento di fonte del diritto potrebbe produrre solo conseguenze negative, come [a] la mancanza di certezza giuridica che, per definizione, dovrebbe essere un valore insindacabile, specie qualora sia guardato nell'ottica dell'uguaglianza nell'ambito della Chiesa universale; [b] il rischio di parzialità e dipendenza dei

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<sup>16</sup> Cfr. C. Begus, *Larmonia nella giurisprudenza canonica*, Città del Vaticano 2003, Lateran University Press, p. 26; *Il ruolo della giurisprudenza nell'art. 126 della Costituzione Apostolica Pastor Bonus e nelle Allocuzioni di Giovanni Paolo II al Tribunale della Rota Romana*, "Apollinaris" 86 (2003), pp. 515–527; 521–523.

<sup>17</sup> Cfr. R. Iannone, *La dimensione culturale del diritto*, "Quaderni di Sociologia" 29 (2002), p. 189; G. Pino, *La gerarchia delle fonti del diritto. Costruzione, decostruzione, ricostruzione*, "Ars Interpretandi" 16 (2011), pp. 22–23; R. Pardolesi, G. Pino, *Post-diritto e giudice legislatore...*, p. 120.

giudici nel proprio agire; [c] poca unità giurisprudenziale dovuta a variabile prassi giudiziaria. Queste sono solo alcune ragioni di carattere esemplare che rilevano la scarsa qualità argomentativa e l'insufficiente autorità nel pronunciarsi in modo permissivo in un caso singolo e non possono garantire che, in tutti i provvedimenti, si debba facilmente identificare l'*auctoritas rerum perpetuo similiter iudicatarum* e difendere la propria prerogativa di essere giudicato *similiter ex similibus*.<sup>18</sup>

## 5. Senso 'realistico' di fonte del diritto

La terza accezione di fonte del diritto rappresenta una soluzione intermedia tra due poli opposti poiché è probabile che, in tal accezione, dai fattori rilevanti si possano rintracciare elementi di cui il giudice dovrebbe tener conto per raggiungere una pronuncia non solo giusta, ma anche giuridicamente corretta. In realtà, si tratta di valorizzare la consuetudine, cioè certi materiali normativi in cui essa sarà trattata come giuridicamente necessaria o altri materiali in cui essa dovrebbe essere trattata come necessaria, salvo forti ragioni in contrario. Inoltre, non vanno ignorati materiali ritenuti come fortemente consigliabili sebbene la loro omissione non dovrebbe pregiudicare la validità della decisione. Vi possono essere utili anche materiali semplicemente ornamentali che non incidono sul merito della decisione. Considerando questo contesto, vista la rilevanza sociologico-giuridica di tali fattori, ha pienamente senso chiedersi se la giurisprudenza sia fonte del diritto in un ordinamento canonico quale erede, *mutatis mutandis*, della tradizione romano-germanica. In altre parole, ci si chiede se, in che misura e in quali circostanze, i giudici debbano conformarsi alle interpretazioni del diritto già fatte in sede giurisprudenziale e quanta libertà avranno eventualmente per discostarsene.

Se si impiega quest'ultimo significato (realistico) in riferimento alle fonti nel sistema canonico, non è facile dare una risposta al quesito se la giurisprudenza sia fonte del diritto o meno. Questo per alcuni motivi molto importanti. Per un verso, in quasi tutte le sentenze rotali e in alcune emanate dal Supremo Tribunale della Segnatura Apostolica, si nota una pratica secondo la quale nelle

<sup>18</sup> Cfr. G. Michiels, *Normæ generales iuris canonici*, t. II, Parisiis–Tornaci–Romæ 1949, Desclée et Socii, pp. 66–67; G.P. Montini, *La giurisprudenza dei Tribunali Apostolici e dei Tribunali della Chiesa particolare*, in: Aa. Vv. (eds.), *Il diritto della Chiesa. Interpretazione e prassi*, Città del Vaticano 1996, Libreria Editrice Vaticana, pp. 123–124.

motivazioni delle pronunce si citano ampiamente le risultanze processuali, più o meno simili, quanto allo stato fattuale, alle cause già trattate e decise. In tal senso, i riferimenti giurisprudenziali risultano essere ottimo espediente per rendere più convincente, più solida e più completa un'argomentazione del giudice che si trova di fronte ad una ipotesi fattuale simile. Per altro verso è quasi inesistente e improbabile, la prassi di potersi riferire ai precedenti poiché i tribunali apostolici pronunciano piuttosto principi di diritto su certe questioni sollevate da qualunque motivo di ricorso anche qualora tale pronuncia sia richiesta nell'interesse della legge canonica.<sup>19</sup> Ciò nonostante, quanto all'ambito canonico, non può essere aprioristicamente escluso l'impiego del precedente vero e proprio.<sup>20</sup>

Tornando però al ruolo di fonte attribuibile alla giurisprudenza, da questo punto di vista, sembra che non sia più che una fonte persuasiva o permissiva. Come detto, i giudici si pronunciano sulle base delle massime, private del percorso argomentativo, a sostegno del principio di diritto racchiuso nella stessa massima, ragion per cui è fondato asserire che il giudicante – secondo una illuminante distinzione di Michele Taruffo<sup>21</sup> – usa piuttosto esempi più che precedenti, non perché li creda persuasivi, ma per rendere più persuasiva la sua argomentazione.

Infine, sembra del tutto indeterminato il criterio con cui si potrebbero individuare i dati giurisprudenziali idonei ad essere ritenuti utili in un complesso processo argomentativo del giudice. Qui si pensa al concetto della cosiddetta 'giurisprudenza consolidata' quale stilema rassicurante a cui si ricorre, ma è palese

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<sup>19</sup> La Segnatura Apostolica lo dimostra qualora giudica le cause *de damna reparanda*: *Supremum Signaturæ Apostolicæ Tribunal, dimissionis a mnere docendi, coram Ratzinger, decretum diei 27 octobris 1984*, Prot. N. 10977/79 CA, "Il diritto ecclesiastico" 96 (1985) 2, pp. 260–270; SSAT, *iurium, coram Pompedda, decisio diei 6 maii 2000*, Prot. N. 29240/98 CA, "Ius Ecclesiae" 30 (2018) 2, pp. 593–624; SSAT, *amotionis et incardinationis, diffamationis, iurium œconomicorum et damnorum, coram Schotte, decretum diei 30 novembris 2002*, Prot. N. 31547/00 CA, in: W.L. Daniel (ed.), *Ministerium iustitiæ: Jurisprudence of the Supreme Tribunal of the Apostolic Signatura*, Montréal 2011, Wilson & Lafleur, pp. 340–355; SSAT, *suppressionis parœciæ, coram Daneels, decisio diei 2 novembris 2018*, Prot. N. 52094/16 CA, "Ius Ecclesiae" 33 (2021), pp. 241–251.

<sup>20</sup> Cfr. E. Baura, *Riflessioni sul valore canonico della giurisprudenza*, in: J. Kowal, J. Llobell (eds.), «*Iustitia et iudicium*». *Studi di diritto matrimoniale e processuale canonico in onore di Antoni Stankiewicz*, vol. III, Città del Vaticano 2010, Libreria Editrice Vaticana, p. 1391 e seguenti.

<sup>21</sup> Cfr. M. Taruffo, *Precedente e giurisprudenza*, Napoli 2007, Editoriale scientifica, pp. 31–36.

che nell'esperienza canonica non esistono formule né condivise né chiare per poterle individuare. Da anni però, si osserva l'incompletezza della pubblicazione del materiale giurisprudenziale canonico, nonché la parzialità degli argomenti quale oggetto di quanto deciso a livello apostolico nel contenzioso. Tutto ciò rende il sistema canonico rigido in quanto la riflessione dottrinale parte, quasi esclusivamente, dal dettato codiciale, raramente dalla dottrina giurisprudenziale. Essa avrebbe potuto giocare un ruolo rilevante qualora fosse stata capace di precisare concetti giuridici indeterminati, presenti inevitabilmente in ogni contesto legislativo.<sup>22</sup> È indubbio perciò che la giurisprudenza può consolidare e correggere la prassi in un sempre proficuo rapporto tra le due, per cui si evince la necessità che le pronunce dei tribunali apostolici siano pubblicate tutte ed intere per essere conoscibili<sup>23</sup>; ciò si pone come fattore di crescita e di sviluppo del sistema giuridico della Chiesa. Altrimenti, può accadere che la giurisprudenza, quale dottrina, sia priva di coerenza; poi vi è il rischio che possa dimostrarsi contraddittoria non potendo garantire la costanza di indirizzo nell'ambito processuale. Questo può avverarsi, perché non è dato sapere se si conosca tutta la giurisprudenza o almeno tutta la giurisprudenza rilevante (spesso ciò è impossibile), e che la stessa sia conforme, prevalente e certa a cui è estraneo qualsiasi caos giurisprudenziale.<sup>24</sup> In questo senso, la giurisprudenza non potrebbe operare come fonte del diritto, ma come fonte di confusione.

## 6. Primi risultati

Affermare che il diritto non può esaurirsi in un discorso schiettamente legislativo è come dire una cosa evidente. L'ovvietà di questa tesi si desume dall'essenza stessa del fenomeno giuridico che, a suo tempo nella storia, fu istituzionalizzato. Da questo deriva la necessità della presenza ed operatività di soggetti idonei a produrre delle norme ma anche quelli che sono chiamati ad applicarle in concreto. Risulta che il linguaggio adoperato dal legislatore deve essere continuamente trasformato tramite l'attività degli interpreti tra i quali i giudici svolgono un ruolo primario. Apportare al discorso legislativo dette modifiche significa

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<sup>22</sup> Cfr. E. Baura, *Il valore normativo del precedente amministrativo e giudiziale...*, p. 128.

<sup>23</sup> Cfr. M.F. Pompèdda, *L'amministrazione della giustizia nella Chiesa*, "Ius Ecclesiae" 13 (2001), p. 680.

<sup>24</sup> Cfr. E. Baura, *Il valore normativo del precedente amministrativo e giudiziale...*, p. 125.



avere la dottrina giurisprudenziale come luogo ermeneutico di tale operazione. La giurisprudenza, dunque, è uno strumento naturale tramite il quale viene realizzata l'attività creativa, poiché non è possibile che l'interpretazione non possa modificare il messaggio normativo. In verità, la giurisprudenza deve essere considerata *in qualche senso* una fonte del diritto anche perché le pronunce rese dai tribunali di ampia autorevolezza esercitano certamente un'influenza sulle decisioni degli altri tribunali ecclesiastici oppure acquistano una forza persuasiva (in un certo senso 'autovincolante') all'interno dello stesso grado giurisdizionale. Queste affermazioni, però, devono essere maneggiate con tanta cautela e cura.

La natura senz'altro creativa dell'interpretazione come anche un inevitabile influsso dell'interpretazione giurisprudenziale nella forma del diritto positivo, non possono tuttavia giustificare aprioristicamente alcuna approvazione incondizionata resa verso la dottrina giurisprudenziale o nei confronti degli esercizi irragionevoli di fantasia interpretativa. Quanto sin qui affermato dimostra invece che l'attività interpretativa, fatta dai tribunali ecclesiastici, è una forma di gestione della potestà di governo condizionata da presupposti di vario genere: da idee sottostanti all'essenza del diritto canonico, da valori incorporati dalla tradizione canonica, da principi desumibili da testi legislativi e dallo spirito dell'intero sistema canonico, da altri criteri istituzionali, etici, raramente dichiarati ma ben avvertibili.

Dato per certo che l'interpretazione è denominazione che si dà ad una pratica collettiva, va affermato che essa stessa rappresenta un campo in cui i punti di riferimento acquisiscono una certa rilevanza tanto quanto sorgono divergenze e contrasti i quali, effettivamente, 'portano avanti' la pratica giuridica, garantendo lo sviluppo e l'approfondimento della scienza giuridica. Certamente esistono dei giuristi con punti di vista diversi o conflittuali che propongono alla dottrina le loro specifiche interpretazioni; lo fanno per ribadire il principio di verità processuale (*salus animarum*) ma anche per affermare l'autorevolezza del diritto.

## 7. Conclusione

Chiedersi se la giurisprudenza sia fonte del diritto o meno, potrebbe apparire una domanda più che provocatoria. Per un verso, è indubbio il plateale contrasto con le chiare indicazioni provenienti dalla tradizione giuridica continentale, che affonda le radici nel fenomeno delle codificazioni del diritto, rendendo questa

domanda poco fondata. Per altro verso, occorre abbandonare certi rigidi schemi di ragionamento (di fatto a-canonici) secondo i quali le leggi ‘auto-applicative’, cioè quelle complete e non contraddittorie, solo perché sistemate negli appositi codici, si attuano quasi automaticamente. Anzi, l’evidenza dei fatti dimostra che [a] nessuna disposizione legislativa – anche codicistica – si sottrae all’esigenza di chiarimenti giurisprudenziali; [b] che le ipotesi non previste dal legislatore (e neppure pensabili all’epoca del suo autorevole intervento legislativo) non sono del tutto eccezionali; [c] che la necessità di adattamento delle regole legali, sebbene ‘statiche’ quanto alla loro formulazione letterale, all’evolversi delle esigenze del tempo e della sensibilità sociale documentano sempre una più sentita distanza dall’intervento legislativo.

Messa in discussione la linea di demarcazione tra l’attività di creazione e quella di applicazione del diritto, va sottolineato il ruolo del giudice la cui funzione non è imporsi ideologicamente per esaltare il monopolio legislativo, piuttosto è manifestare la concretezza dell’esperienza giuridica. I tribunali dunque svolgono un ruolo creativo del diritto, potendo questa creatività essere considerata fonte dello stesso diritto, ma solo entro i confini delineati dall’esperienza giuridica attenta a quanto si debba prendere in considerazione per giungere ad una pronuncia giuridicamente corretta, opportuna e giusta secondo gli estremi valori dell’ordinamento canonico, cioè la salvezza delle anime.

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## **Cardinal Stanisław Ryłko – a Priest and a Highly Regarded Sociologist**

### **Abstract**

Cardinal Stanisław Ryłko is a priest of the Archdiocese of Kraków, where he was brought up and educated. As a priest, he worked in the pastoral ministry and then studied not only in Poland, but also in Rome. As a sociologist, he taught at the Faculty of Theology of the Pontifical University of John Paul II in Kraków. He is the author of more than twenty publications in the above-mentioned areas of sociology. Since 1987 he has worked in the Holy See, first in the Polish Section of the Secretariat of State, and then in the Pontifical Council for the Laity. He has been raised to the dignity of Bishop and Cardinal. On 20 December 2016, Pope Francis appointed him archpriest of the Basilica of Saint Mary Major – *Santa Maria Maggiore*, one of the four papal basilicas of Rome.

### **Keywords**

Cardinal, Holy See, World Youth Day, sociology of religion, sociology of family, sociology of parish

One of the best-known Poles in the Catholic Church is Cardinal Stanisław Ryłko. Although he is a priest of the Kraków archdiocese, he hails from the Bielsko-Żywiec diocese. After his ordination to the priesthood, he worked in the pastoral ministry and then studied in Rome.

After his graduation, he was a lecturer in sociology of religion at the Faculty of Theology of the Pontifical University of John Paul II in Kraków. From 1986, he worked in the Holy See alongside the Holy Father John Paul II. His pastoral and scientific achievements are considerable, and his contribution to the development of the Catholic Church calls for acknowledgment. For this reason alone, both his rich life and his activities deserve our attention and recognition.

## 1. Background and Education

Cardinal Stanisław Ryłko was born on 4 July 1945 in Andrychów in the Bielsko-Żywiec diocese. He was the third child (along with Jadwiga and Władysław) of Aurelia and Władysław Ryłko. His father ran his own electrical business, while his mother first worked at Andrychowskie Zakłady Przemysłu Bawełnianego “Andropol” (Cotton Industry Plant “Andropol” in Andrychów), and then helped her husband in running the electrical business.

It is in Andrychów that the Cardinal finds his roots. He writes: “the roots for me are undoubtedly: Andrychów, my family home, parish church, primary school, secondary school. These are my roots in their deepest sense, that is – the foundation of my life, my values, my role models, which shaped me as a man, and later as a priest. And I have to admit that I often think back to these roots. I think back to the people I met here and who certainly left a deep mark on me, be it teachers, secondary school professors or catechists.”<sup>1</sup>

In Andrychów, he attended a kindergarten run by the Little Servant Sisters of the Immaculate Conception, and then attended Maria Konopnicka Primary School No. 2 and Maria Skłodowska-Curie Secondary School. He was an exemplary student and his certificates were characterised by the best grades.

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<sup>1</sup> Nie zmarujemy daru. Z Przewodniczącym Papieskiej Rady do spraw Świeckich, ks. Arcybiskupem Stanisławem Ryłko rozmawia Ireneusz Żmija [Let us not squander the gift. The President of the Pontifical Council for the Laity, Archbishop Stanisław Ryłko, is interviewed by Ireneusz Żmija]; [https://issuu.com/nawiny\\_andrychowskie/docs/gazeta\\_styczen2009](https://issuu.com/nawiny_andrychowskie/docs/gazeta_styczen2009) (12.10.2020).

In St. Matthias parish in Andrychów, he was baptized, received his First Communion and the Sacrament of Confirmation (20 September 1959). Here he attended catechism classes, and was particularly influenced at that time by Father Józef Sanak (1917–2008), who was imprisoned during the Stalinist period (1950–1955). Father Sanak delivered the homily during priest Ryłko's First Mass as a bishop in his home parish of St. Matthias, which took place on 21 January 1996.

At school, Stanisław Ryłko was a very talented student who, while achieving the highest grades, remained quiet and modest. He was considered to be the best graduate of his primary school, and his name was written in the Golden Book of Graduates of the school in the year in which he graduated, that is 1958/59, class VII b.<sup>2</sup>

As regards his further education, he attended a general secondary school from 1959 to 1963. Some years later, his friend Anna Gancarczyk, who later served as the school's principal, recalled: "We studied together at Maria Skłodowska-Curie Secondary School in Andrychów. Stanisław showed great interest in science, although he was also very good at other subjects. Some people were surprised to hear that he had chosen theology. But to those who watched him closely, he always seemed to be focused on spiritual matters and on prayer. He was very hardworking, humble and extremely talented. His certificates were all As!"<sup>3</sup>

To Joanna Adamik's question: "Do you remember the moment when you first heard the voice of vocation?" the Cardinal answered: "To tell the truth, this voice grew in me, starting from the moment I became an altar boy in Andrychów: the altar service and gazing at the priest who celebrated the Eucharist. I was fortunate because we had very good mentors of the altar service in our parish, who were able to kindle in us a love for the Eucharist. There came a moment when I understood that this was it, that the Lord was calling me: 'Follow me'. That was in 1963."<sup>4</sup>

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<sup>2</sup> *Kardynał z Andrychowa [Cardinal from Andrychów]*, <https://www.niedziela.pl/artukul/83975/nd/Kardynal-z-Andrychowa> (10.10.2020).

<sup>3</sup> *Kardynał z Andrychowa [Cardinal from Andrychów]*, <https://www.niedziela.pl/artukul/83975/nd/Kardynal-z-Andrychowa> (10.10.2020).

<sup>4</sup> Cardinal S. Ryłko, *Spotkałem w swym życiu wielu świętych kapłanów [I Have Met Many Holy Priests in my Life]*, (20 March 2019), <https://diecezja.pl/aktualnosci/kard-stanislaw-Rylo-spotkalem-w-swym-zyciu-wielu-swietych-kaplanow/> (12.10.2020).

## 2. Further Education

In 1963, the Candidate entered the archdiocesan seminary in Kraków, where he was received by the then young auxiliary bishop, Karol Wojtyła, who later, already as Archbishop, ordained him priest on 30 March 1969. After his ordination, Stanisław Ryłko was assigned to work as vicar in Poronin (1969–1971).

It is important to emphasize the close relationships between the Cardinal and his family. Already an archbishop, he would eagerly come from the Vatican City to Andrychów, and almost every Christmas, he would visit his brother, now deceased. The Cardinal has a great talent for foreign languages and he studied them during his the seminary years. He made good use of his time for studying. His diligence sometimes astonished his classmates. He left the seminary as one of the best graduates, then studied in Rome and Washington. We felt that one day he would join the order of the Scarlet Mantle... He always remembered Andrychów. As one of the closest collaborators of John Paul II, working in the Vatican Curia, he was one of the spiritual inspirers of the ceremony of granting and presenting Pope John Paul II with the title of Honorary Citizen of Andrychów, ten years ago.

He studied theology at the Faculty of Theology of the Pontifical University of John Paul II in Kraków, obtaining a master's degree in dogmatic theology in 1972 on the basis of his thesis *Rola abnegacji w życiu chrześcijańskim według Konstytucji "Lumen Gentium"* [*The role of abnegation in the Christian life according to the Constitution 'Lumen Gentium'*], under the supervision of bishop Stanisław Smoleński, PhD. In 1972–1978 he continued his studies in Rome at the Faculty of Social Sciences at the Pontifical Gregorian University, where he obtained a canonical licentiate on the basis of the thesis *La dinamica psico-sociale dell'appartenenza al gruppo ecclesiale informale. Studio del caso: Centro Gioventu San Bernardino.*, Rome, 1975 [*Psychosocial dynamics of belonging to an informal church group. A case study: San Bernardino Youth Centre*]. His supervisor was Prof. Dr. J. Schasching SJ.

He earned his PhD in 1978 by defending his thesis entitled *La scelta vocazionale e il suo sviluppo. Studio psico-sociologico sugli studenti di un seminario maggiore in Polonia* (*The Choice and Growth of Vocation: Psycho-sociological study of students of major seminaries in Poland*). For his doctoral dissertation, written under the supervision of Prof. J. Schasching SJ, he received a distinction: the silver medal of the University. While still a student, in 1976, Fr S. Ryłko was asked by Cardinal K. Wojtyła to translate into Italian the text of his Lenten retreat, which the Cardinal then delivered in the Vatican for Pope Paul VI.



After his return to Poland, he served as the Vice-Chancellor of the Major Seminary in Kraków and taught pastoral theology and sociology at the Pontifical Academy of Theology in Kraków (1978–1987). In this relatively short period of time, he supervised as many as ten master's theses, which include: Jan Fryźlewicz, *Praktyki religijne młodzieży szkół średnich a środowisko społeczne. Badania ankietowe przeprowadzone wśród młodzieży katechizowanej w parafii Najświętszego Serca Pana Jezusa w Nowym Targu*, PWT, 1982 [*Religious Practices of Secondary School Students and the Social Environment. Surveys conducted among catechised youth in the parish of the Sacred Heart of Jesus in Nowy Targ*, PWT<sup>5</sup>, 1982, (sociology of religion)]; Jan Abrahamowicz, *Autorytet wychowawczy księdza w oczach młodzieży. Badania ankietowe przeprowadzone wśród młodzieży uczęszczającej na katechizację w parafii św. Kazimierza w Krakowie* [*The Priest's Educational Authority in the Eyes of Youth. Surveys conducted among youth attending catechisation in the parish of St. Casimir in Cracow*, PWT, 1982, (sociology of religion)]; Kazimierz Iciek, *Idealy osobowe młodzieży uczęszczającej na katechizację. Ankieta przeprowadzona w parafii św. Józefa w Krakowie* [*Personal Ideals of the Catechised Youth. A survey conducted in St. Joseph parish in Cracow*], PAT WT, 1983, (sociology of religion); Fr. Władysław Rusnak, *Postawy młodzieży wobec niedzieli i niedzielnej Mszy świętej. Studium socjologiczne na przykładzie parafii Mszana Dolna* [*Attitudes of Youth towards Sunday and Sunday Mass. A sociological case study on Mszana Dolna parish*], Krakow PAT WT, 1984, (sociology of religion); Jacek Przybyła, *Sociologiczno-duszpasterkie aspekty tworzenia się nowej parafii na przykładzie Łodygowic Górnych w archidiecezji krakowskiej* [*Sociological and Pastoral Aspects of a New Parish Formation: Case Study of Łodygowice Górne in the Archdiocese of Cracow*], PAT WT, 1985, (sociology of religion); Andrzej Sochacki, *Młodzież wobec małżeństwa. Studium socjologiczne na przykładzie parafii p.w. Matki Bożej Saletyńskiej w Rzeszowie* [*Youth and Marriage. A sociological case study on the parish of Our Lady of La Salette in Rzeszów*], Kraków PAT WT, 1985, (sociology of religion); Piotr Pawlus, *Rola wiary w życiu młodzieży. Badania ankietowe przeprowadzone wśród katechizowanej młodzieży maturalnej w parafii Narodzenia Najświętszej Maryi Panny w Żywcu* [*The Role of Faith in the Life of Youth. Surveys conducted among catechized secondary school graduates in the parish*

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<sup>5</sup> PWT (Papieski Wydział Teologiczny) and PAT WT (Papieska Akademia Teologiczna Wydział Teologiczny) both refer to The Faculty of Theology of the Pontifical University of John Paul II in Krakow [translator's note].

of the Nativity of the Blessed Virgin Mary in Żywiec], PAT WT, 1986, (sociology of religion); Ryszard Zastawny, *Młodość o problemie alkoholizmu. (Badania ankietowe wśród młodzieży katechizowanej w parafiach: Żarki oraz Kraków-Borek Fałęcki)* [Youth on the Problem of Alcoholism. Survey research among the catechized youth of the parishes: Żarki and Kraków-Borek Fałęcki], PAT WT, 1986, (sociology of religion); Andrzej Kopicz, *Katechizacja i jej znaczenie w oczach młodzieży. Ankieta przeprowadzona w parafii św. Jana Chrzciciela w Komorowicach* [Catechization and its Meaning in the Eyes of Youth. A survey conducted in St. John the Baptist parish in Komorowice], PAT WT, 1987, (sociology of religion); Mirosław Sander OP, *Kwestia męczeństwa Ojca Cyryla Szlachtowskiego OP (1899–1944), misjonarza chińskiego* [The Question of Martyrdom of a Chinese Missionary Father Cyryl Szlachtowski OP (1899–1944)], Krakow: WT, 2007, (Kol. Filozof. Teolog. OP), (canon law).

In 1979, he became a secretary of the Commission for the Lay Apostolate of the Polish Episcopal Conference, established on the initiative of Cardinal Karol Wojtyła.

### 3. Service in the Church

After obtaining a scholarship at the Catholic University in Washington, D.C., in 1987, he worked alongside the Holy Father John Paul II at the Pontifical Council for the Laity as Chairman of its youth section. It is worth noting that in this Council, he succeeded Father Józef Michalik, who in 1986, was appointed bishop of the Diocese of Zielona Góra-Gorzów. Fr. Stanisław Ryłko held this position for five years, during which he participated in the organisation of World Youth Days in Santiago de Compostela (1989), Częstochowa (1991) and Denver (1993).

In 1992, John Paul II appointed Fr. Stanisław as an employee of the Polish Section of the Secretariat of State, and then, on 2nd December 1995, Bishop (Titular Bishop of Novica) and Secretary of the Pontifical Council for the Laity, where he had already worked. The following year, on 6 January 1996, he was ordained Bishop by Pope John Paul II. He took the words *Lux mea Christus* – “Christ is my light” – as his episcopal motto. These words hold the key to understanding his priestly vocation. It was said then that Wadowice had a Bishop of Rome, and Andrychów had a Bishop in Rome. Six years later, on 4 October 2003, he was appointed Archbishop and President of the Pontifical Council for the Laity. He held this position until 31 August 2016.

On 17 October 2007, he was on the list of nominees for the dignity of Cardinal, to which he was elevated during the consistory convened by Pope Benedict XVI for 24 November 2007. He received the news while he was in Sydney (Australia), where he was visiting in connection with the organisation of the next World Youth Day. He took part in the Conclave of 2013, which elected Pope Francis.

He was the organiser of the World Youth Day in Cologne in August 2005 and was also involved in the preparations for the following events held in Sydney (2008), Rio de Janeiro (22–29 July 2013) and Kraków (July 2016).

In accordance with Pope Francis' *motu proprio Sancta Mater*, issued on 15 August 2016, which reformed the Roman Curia, on 1 September 2016, the Pontifical Council for the Laity became part of the emerging Dicastery (Congregation) for Laity, Family and Life. At that moment, Cardinal Stanisław Ryłko ceased to serve as President of the Council. Immediately, on 20 December 2016, Pope Francis appointed him arch-presbyter of the Basilica of Saint Mary Major – *Santa Maria Maggiore*, one of the four papal Basilicas in Rome. It houses the famous image of *Our Lady Salus Populi Romani* – Protectress and Health of the Roman People. He made his ingress into the Papal Basilica on 2 February 2017. Subsequently, on 19 May 2018, the Candidate was promoted by Pope Francis to the rank of Cardinal Priest with the retention of his previous diakonia on a *pro hac vice* basis. Finally, on 11 August 2018, he was appointed a member of the Pontifical Commission for the Vatican State.

In 2015, the President of the Republic of Poland, Andrzej Duda decorated him with the Grand Cross of the Order of Polonia Restituta. Previously, by order of President Lech Kaczyński on 9 November 2009, he was decorated with the Commander's Cross with Star of the same order, with the justification: "for outstanding merits in public activity for the development of cooperation between the Republic of Poland and the Holy See."

#### 4. Scientific Achievements

He is the author of twenty-two publications, including monographs, parts of monographs, as well as scientific articles and introductions to various publications. Most of them were published outside Poland.

1. John Paul II, *Anioł Pański z papieżem Janem Pawłem II, 27 października 1991 – 16 października 1994 [Angelus with Pope John Paul II, 27 October 1991 – 16 October 1994]*, [eds: Stanisław Dziwisz, Henryk Nowacki,

- Stanisław Ryłko], vol. V, Edizioni Aquila Bianca: Libreria Editrice Vaticana, Città del Vaticano 1995;
2. *Czestochowa '91: VI World Youth Day: VI Giornata Mondiale della Gioventù: VI Vlème Journée Mondiale de la Jeunesse: VI Jornada Mundial de la Juventud: VI World Youth Day: VI Weltjugendtag*, compiled by Youth Section of the Pontifical Council for the Laity; [ed. Stanisław Ryłko], Roma, Pontificio Consiglio per i Laici, Città del Vaticano 1991;
  3. *El espíritu de los hijos de Dios: espíritu de libertad: III Forum Internacional de Jóvenes*, Pontificio Consejo para los Laicos; [presentacion Eduardo Pironio; introd. Stanisław Ryłko], Ciudad del Vaticano: Pontificio Consejo para los Laicos, Città del Vaticano 1992;
  4. *L'Esprit des fils de Dieu: esprit de liberté: IIIème Forum International des Jeunes Czestochowa, 7–10 août 1991*, Conseil Pontifical pour les Laïcs; [prés. Eduardo Pironio; introd. Stanisław Ryłko], Forum Internazionale dei Giovani 1991, Czestochowa. Cité du Vaticana: Service de Documentation, Città del Vaticano 1992;
  5. *Der Geist der Kinder Gottes, geist der freiheit: III. Internationales Jugendforum Tschenstochau, 7.–10. August 1991*, Päpstlicher Rat für die Laien; [Vorstellung Eduardo Pironio; Einl. Stanisław Ryłko], Vatikanstadt: Päpstlicher Rat für die Laien, Città del Vaticano 1992;
  6. *Generazione Giovanni Paolo II: la storia della Giornata Mondiale della Gioventù/Mimmo Muolo*; pref. di Stanisław Ryłko, Ancona–Milano 2005;
  7. *Ewangelia pracy: encyklika Jana Pawła II "Laborem exercens" wraz z komentarzem [The Gospel of Work: John Paul II's encyclical "Laborem exercens" with commentary]* (ed.: Jerzy Chmiel i Stanisław Ryłko), Wyd. Polskie Towarzystwo Teologiczne [Polish Theological Society Publishing House], Kraków 1983;
  8. *The spirit of the sons and daughters of God: spirit of freedom: III International Youth Forum Czestochowa, 7–10 August 1991*, [pref. Eduardo Pironio; introd. Stanisław Ryłko], Ciudad del Vaticano: Pontificio Consejo para los Laicos, Vatican 1992;
  9. *Lo Spirito dei figli di Dio: Spirito di libertà: III Forum Internazionale dei Giovani, Czestochowa, 7–10 agosto 1991*, Pontificio Consiglio per i laici; [pres. Eduardo Pironio; introd. Stanisław Ryłko], Città del Vaticano: Pontificio Consiglio per i Laici, Vatican 1992;
  10. *Segno di contraddizione: meditazioni / Karol Wojtyła*, Vita e Pensiero, Milano 1977;

11. *La aventura de la vida cristiana: Juan Pablo II a los jóvenes*, (Júlio Egrejas; Prologo del Stanisław Ryłko), Vida y Espiritualidad, Lima 2014;
12. *Pokolenie Światowych Dni Młodzieży [The World Youth Day Generation]*, (Mimmo Muolo; with a foreword by Stanisław Ryłko and an introduction by Marcello Bedeschi), (translated by Marcin Masny), Wydawnictwo św. Stanisława BM [St Stanislaus BM Publishing House], Krakow 2015;
13. *I laici nella Chiesa oggi: sfide e prospettive*, Grafitalica, Napoli 2000;
14. *Świeccy w dzisiejszym Kościele. Wyzwania i perspektywy, [The Laity in Today's Church. Challenges and Perspectives]* Kraków 2000;
15. *Il mondo dello sport oggi: campo d'impegno cristiano: seminario di studio, Vaticano, 11–12 novembre 2005*, Pontificium Consilium pro Laicis; [prefazione Stanisław Ryłko], Libreria Editrice Vaticana, Città del Vaticano 2006;
16. Tortorella Laura, *La Mulieris Dignitatem nel post-moderno alla luce di Maria / a cura di Laura Tortorella*, (prologo pref. Stanisław Ryłko), IF Press srl, Morolo 2012;
17. *Pier Giorgio Frassati e Giovanni Paolo II: la santità possibile per tutti / a cura di Cecilia Gilodi*, (prologo pref. del S. Ryłko), Cantagalli, Siena 2008;
18. *Folk religiosity in the light of the 1974 Synod of Bishops and the apostolic exhortation "Evangelii nuntiandi" of Paul VI*, "Analecta Cracoviensia", 18 (1986), pp. 415–439;
19. John Paul II, *Wierzę w Kościół: jeden, święty, powszechny i apostołski [I Believe in the Church: One, Holy, Catholic and Apostolic]*, [eds. Stanisław Dziwisz, Henryk Nowacki, Stanisław Ryłko], Libreria Editrice Vaticana: Edizioni Aquila Bianca, Città del Vaticano 1996;
20. *The World of sport today a field of christian mission: International Seminar: Vaticano, 11–12 November 2005*, Pontificium consilium pro laicis; [prefazione Stanisław Ryłko], Libreria Editrice Vaticana, Città del Vaticano 2006;
21. *Żniwo jest wielkie [The Harvest is Great]*, [text prepared by: Stanisław Szymecki, Stanisław Ryłko], Association Notre Famille, Paris 1979;
22. *The World Youth Day generation*, Pontifical University of John Paul II in Krakow Krakow 2016.

In his publications, Cardinal Stanisław Ryłko dealt in particular with the sociology of religion, and more specifically with pastoral theology in both its

criteriological (doctrinal) and kairological (sociological) aspects. This was the subject of his lectures and some of his publications. The author's endeavours to present, in a synthetic way, the complex issue of the presence and involvement of lay Catholics in the sphere of social life, were largely successful. The foundation for his views may be found in the documents of the Social Teaching of the Church. An important role in this area was played by the book *Świeccy w dzisiejszym Kościele. Wyzwania i perspektywy* [*The Laity in Today's Church. Challenges and Perspectives*], Kraków 2000, which was then translated into other languages, for example, into Italian (*I laici nella Chiesa oggi: sfide e prospettive*, Grafitalica, Napoli 2000). It may become an inspiration to undertake further, detailed studies of those issues that were only mentioned in the book.

The question of the apostolic activity of lay people comprises both their individual and collective acts. Lay Catholics form various apostolic communities and establish associations. The pontificate of John Paul II, when Cardinal Stanisław Ryłko was the prefect and the president of the Pontifical Council for the Laity, saw a particular flourishing of these. He also noted that all associations aim to enrich the mission which the Church fulfils in the world. Therefore, he supported their development, so that they would bear more and more mature fruit. The Candidate has often commented on this topic, not only in various documents, but also in his homilies and lectures which were delivered during numerous international events and congresses, to which he was eagerly and often invited.

Cardinal Ryłko has spoken very knowledgeably on the subject of popular religiosity, especially at the beginning of his academic career, for example, in his article "*Folk Religiosity in the Light of the Synod of Bishops in 1974 and of the Apostolic Exhortation 'Evangelii Nuntiandi' of Paul VI*", "*Analecta Cracoviensia*" 18 (1986), pp. 415–439. He saw folk religiosity and folk culture as closely connected. Since the Gospel needed a long time to take root in different cultures, folk religiosity did not always coincide with institutional, that is, ecclesiastical one, and sometimes differed from it considerably. It was formed in a lively and spontaneous way and manifested itself in certain traditions, services, language, pilgrimages, sacred places and art. It repeatedly expressed itself in the richness of religious culture and practices and in the multidimensional connection between religion and the everyday life of the people. This theme was extremely important because of inculturation, which the Church began to teach about more and more vociferously.

The above-mentioned subject leads to another, that is, to the question of holiness, which also holds its important place in the research work of Cardinal

Stanisław Ryłko. The author notes that, although it has a universal character, for everyone has been invited by God to become a saint, every person has his/her own way to attain sainthood. Everyone is called by God to holiness, but the ways of life in which sanctification is to take place, are different for each person. In a way, they are conditioned by a person's character, intellectual abilities, upbringing (especially religious one), and the social and cultural circumstances in which that person lives. These conditions may facilitate or hinder the process of maturing into holiness. However, the most important factor determining holiness is openness to God's grace and the ability to cooperate with it, manifested, for example, in the life and work of Blessed Peter Frassati (*Pier Giorgio Frassati e Giovanni Paolo II: la santità possibile per tutti / a cura di Cecilia Gilodi*, (prologo pref. del S. Ryłko), Cantagalli, Siena 2008).

## 5. Contribution to the Development of Church Teaching

An important area of the Cardinal's research is the social teaching of Pope John Paul II, of whom he was a close and dedicated collaborator. We know, from the statements of Polish priests working in the Vatican, that many enunciations of John Paul II were translated into Italian by Fr. Ryłko. He knew well that these problems troubled the Holy Father and he tried to confront them. The Candidate devoted a lot of attention to the problem of human work, which is a great task and a vocation for for the life man. A very important study in this regard is the article: *Ewangelia pracy: encyklika Jana Pawła II "Laborem exercens" wraz z komentarzem [The Gospel of Work: John Paul II's Encyclical "Laborem Exercens" with Commentary]*, (ed.: Jerzy Chmiela i Stanisław Ryłko), published by Polskie Towarzystwo Teologiczne, Kraków 1983.

Most of the Cardinal's attention, however, has been devoted to the matters of World Youth Day, which is absolutely understandable given his great involvement in this truly global undertaking. This fact is not surprising since the event has become a permanent part of the Church's activity and this is also due to the Cardinal's work. World Youth Day is preceded by long preparations (at least one-year-long) and comprises the deliberations of the 'Forum' on a chosen theme, as well as three days of catechesis. The programme of the meeting with the Pope includes a prayer vigil and Holy Mass. The common meetings are a special opportunity for evangelisation, community experience, spiritual and apostolic renewal. One can say that they are not only a celebration, but also

a serious spiritual work. It should be also mentioned that, in addition to the preparation phase for the meetings, the important role is played by the period of implementation of the World Youth Day postulates.

According to the Cardinal, World Youth Days are providential moments of reflection, which allow young people to ponder upon their deepest desires, to strengthen their awareness of belonging to the Church and to profess, with ever greater joy and courage, their shared faith in the crucified and risen Christ. At these moments, many young people, following the voice of the Holy Spirit, a voice both strong and gentle, take mature and courageous decisions, which will perhaps influence the future course of history. Their true fruits cannot be calculated in statistics, but only in the works of love and justice, and in their daily fidelity, which is so precious, although so often invisible.

It is also not surprising that the Cardinal, influenced by these World Youth Days, raises a subject which has been present in the public space for some time, that is the “Generation of John Paul II” (*Generation of World Youth Days*, (Mimmo Muolo; with a foreword by Stanisław Ryłko and an introduction by Marcello Bedeschi), (translated by Marcin Masny), published by Wydawnictwo św. Stanisława BM, Kraków 2015). The author applies this term to people who were fortunate enough to personally meet John Paul II, a man of great heart, intellect and spirit, on the paths of their lives. It is the duty and, at the same time, the privilege of these people to preserve, deepen and develop the teaching of John Paul II, and to pass on this gift on to future generations. John Paul II turned out to be an extraordinary gift for the Church and the world. Initially, he served the Church in Kraków and the Church in our homeland, and from 16 October 1978, he became a servant of the whole Church and the world.

According to the Cardinal, the greatness of John Paul II lies in the fact that he was a man of deep faith and prayer, who put God at the centre of his existence. Fascinated by the figure of Jesus Christ and His Gospel, he made himself available to the Church and his life took the shape of service to man and the world. His profound experience of God and the things of God were combined in his person with a titanic activity. He guided the Church, he enriched her life and her reflection with his extensive teaching, and he dealt with the great problems of the contemporary world. The Cardinal even speaks about the specific mysticism of John Paul II.

The Cardinal wrote: “The Holy Father John Paul II is some great prophet of our times. He is ahead of us and sometimes he says more than we are able to comprehend. And it is good that it is so, because he gives us time to return



to his words, to try to understand them better and better. Above all, we should put his teaching into practice. The Holy Father is a great gift for us, but at the same time it is a challenge and a great task not to waste this gift.”

The Cardinal contributed to reviving the pastoral awareness of what a parish is, and the important role it plays in the life of the Church. It is worth recalling his words from an interview: “Undoubtedly, the parish and popular religiosity in Poland are an enormous spiritual capital of both the Polish Church and the Polish nation. This attachment, love of the Church, which is characteristic of Poles, is undoubtedly a great value on which one can build. It can be a starting point. I am currently working as President of the Pontifical Council for the Laity so I meet bishops from various countries every day, and in my conversations with them the observation that parochial Catholicism is the foundation keeps coming back. But today it needs deepening. The means of this deepening, as far as the formation of lay people is concerned, are small communities, church movements. This is a great gift of the Holy Spirit for the Church in our times, as the Holy Father says. This is the great wealth of the Church in these difficult times.”

Cardinal Ryłko was a supporter of European integration, about which he stated: “We enter Europe with an experience which is our great wealth. I am talking about the experience of a totalitarian system, which is a unique one. The citizens of Western Europe do not have it. We know what it means to be enslaved, what it means to lack freedom, religious freedom, for example, and we know what the price of freedom is. People in the West know as much about these things. Hence our great task: to use the freedom which has, in a certain sense, been given to us, to make good use of it so as to build good in all dimensions: moral, social and religious.”

## 6. Conclusion

It is commonly known that, since 1987, Cardinal Stanisław Ryłko has been the head of the youth section of the Pontifical Council for the Laity, and he has made a huge contribution to the organization of the first World Youth Days, which took place in Santiago de Compostela, Częstochowa and Denver. The fact that World Youth Day had such a fantastic international character and course, is undoubtedly the personal merit of Cardinal Stanisław Ryłko.

The Holy Father John Paul II and the priest, and later Bishop and Archbishop Stanisław Ryłko, shared common research and cultural interests. This caused

the Cardinal to serve the Holy Father, and subsequently, the whole Church so competently and devotedly for many years. The Cardinal was also by the side of the Holy Father at the moment of his departure to the House of the Father on 2 April 2005. Together with others, for example, Cardinal Marian Jaworski, he participated in the final Holy Mass celebrated at the bedside of the dying Pope, and provided him with a viaticum on his way to eternity. Together with Cardinal Jaworski and Cardinal Stanisław Dziwisz, at the moment of the Pope's death, he sang *Te Deum laudamus*. It was Cardinal Stanisław Ryłko who at that dramatic moment, stopped the clock in the room of the deceased Saint John Paul II at 21.37.

In addition, the kindness with which he always refers to his Homeland deserves recognition. He is a true patriot who loves his homeland, his hometown of Andrychów (as already mentioned, he is an honorary citizen of Andrychów), but also his greater homeland – Poland, of which he is an ambassador in Italy, and in a way also in the whole world. His love for his homeland has amounted to a great testimony.

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## **Theologically Inspired and Supported Patriotism as a Component of Poland’s National Security. Concept of Research and its Social Application**

### **Abstract**

The article<sup>1</sup> presents a concept of research and its social application concerning the creation and modelling of theologically inspired and supported patriotic attitudes in the Polish historical and security-related context. It concerns patriotism which, primarily, refers to Poland’s national heritage, theology, Catholic social science and national responsibility; secondly, it is directed at a sovereign economic development locally and on the international arena; thirdly, it shapes pro-societal and pro-defence attitudes;

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<sup>1</sup> The article has been written as part of the project “Bezpieczeństwo narodowe – religia – historia” (National security – religion – history) carried out at the Interdisciplinary Research Centres of the University of Warsaw “Tożsamość – Dialog – Bezpieczeństwo” (Identity – Dialogue – Security).

fourthly, it takes into account contemporary challenges linked with the environment, demography, migrations and “temporal challenges”. The text is classified among the papers on conceptualization of research projects in the area of security studies, social policies and political science, account being taken of the contexts and problem references to theology, history and cultural anthropology.

### **Keywords**

patriotism, theology, national security, Poland’s cultural heritage, religiously inspired pro-societal behaviours, national responsibility, research project

## **1. Introduction**

This article is aimed at presenting a concept of research concerning the creation and modelling of theologically inspired and supported patriotic attitudes in the Polish historical and security-related context, and subsequently the concept of social application of the effects of the inquiries. It concerns patriotism which, primarily, refers to Poland’s national heritage, theology, Catholic social science and national responsibility; secondly, it is directed at a sovereign economic development at home and on the international arena; thirdly, it shapes pro-societal and pro-defence attitudes; fourthly, it takes into account contemporary challenges linked with the environment, demography, migrations and “temporal challenges” – which is understood as taking care of the current national needs: natural disasters, epidemics, armed conflicts.<sup>2</sup>

The main question posed at the beginning of the research, the result of which is this study, reads as follows: What contents should be covered by a research project concerning theologically inspired and supported patriotism, perceived as one of the forces contributing to Poland’s national security and what steps should be undertaken in order to utilise the knowledge acquired as a result of this research for supporting the societal pro-defence potential? Aiming at the maximum synthesis of the contents and bearing in mind the optimal clarity of the message concerning the planned research ventures, the content of the postulated research was outlined by answering the following four questions:

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<sup>2</sup> The inspiration for research on the relationship between patriotism and Christian thought in Poland was John Paul II’s book “Memory and Identity”, in which the pope wrote, among other things, about homeland, nation, state and patriotism. Cf. John Paul II, *Memory and Identity: Conversations at the Dawn of a Millennium*, New York 2005, Rizzoli.

why? (Research motives and significance); what? (Research object and hypothesis); how? (Research methods, sequence of activities, dissemination and project performance indicators); what? (Anticipated research effect and its weight).

This text fits into a group of papers on conceptualization of research projects in the area of security studies, social policies and political science, account being taken of the contexts and problem references to theology, history and cultural anthropology. Thus, the article includes contents which may be used for future studies as regards the concept of research focused on the following concepts: patriotism of the Poles, theologically inspired thinking, national security, national identity, Poland's cultural heritage. In the research, the result of which is this paper, a holistic approach was employed, basing on the assumption that phenomena and situations were to be considered in a comprehensive and multi-faceted manner, while the collected source material is to be subject to mutual confrontation, aimed at acquiring information that would contribute to an orchestrated message. Theoretical methods, mainly the analysis, synthesis and inference, have been used in the course of the research.

## **2. Why? – Why is there a need to research theologically inspired and supported patriotism in Poland?**

It is actually an axiom that the patriotism of the Poles is strongly related to Christian theological thought. Therefore, it is by no mean surprising that the Conference of the Polish Episcopate publishes documents on patriotism. In 1972, on the 200<sup>th</sup> anniversary of the first partition of Poland, the Plenary Conference of the Polish Episcopate holding its debates in Poznań, addressed a letter to the community of Catholics entitled "On Christian patriotism."<sup>3</sup> The 1974 Memorandum of the Polish Episcopate to the Government of the Polish People's Republic is permeated with patriotic ideas. The document places stress on national identity and points out the role of the Church: "The people have the right to be themselves and not to lose any of the goods that have shaped their history and their culture (...). The Church and the Catholic society were in history and continue to be the proper subject for the creation and perpetuation

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<sup>3</sup> Cf. Konferencja Episkopatu Polski, *O chrześcijańskim patriotyzmie*, in: *Listy pasterskie Episkopatu Polski 1945–2000*, P. Libera, A. Rybicki, S. Łącki (eds.), Part 1, Marki 2003, Michalineum, pp. 886–891.

of culture.”<sup>4</sup> In 2003, the Episcopate of Poland adopted the “Directory for the Pastoral Ministry to Families”. The document mentions, among other things, that: “Every family should nurture civil virtues: openness to another human being, loving them, ability to forgive, reliability in life, honesty at work, care for the common good, etc., foster patriotism, learn one’s own history, teach respect for other peoples.”<sup>5</sup> An important contribution regarding love for the homeland, is a document elaborated by the Social Affairs Council operating at the Conference of the Polish Episcopate, entitled: “Out of concern for people and the common good”<sup>6</sup>, which was published in 2012. In the document, there is a whole passage bearing the title: “Patriotism as a school of identity”. That document recalls that “Love of your homeland is – according to Christian teaching – is a dictate of conscience. Therefore, it is linked with the sense of duty, unlike the emotional experience.”<sup>7</sup> Polish bishops spoke out comprehensively on patriotism in Poland in a document issued in 2017, entitled: “The Christian form of patriotism. Document of the Conference of the Polish Episcopate prepared by the Social Affairs Council.”<sup>8</sup>

It is impossible to speak about the national identity of the Poles as well as the history, independence and sovereignty of Poland, without reference to the Church and the Catholic social teaching. Existing within the society seen diachronically, the Church reveals itself as preaching the Gospel to all human communities, with account being taken of their diversity. From the theological point of view, the history of salvation does not take place separately from the history of people, but permeates it all, whereas the social space, besides being a sociological place, is also a theological place (Lat. *locus theologicus*). It would be erroneous to state, however, that the data pertaining to the relationship between theological thinking and patriotic attitudes in Poland are crucial for the

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<sup>4</sup> *Memoriał Episkopatu Polski do Rządu PRL w sprawach istotnych kultury chrześcijańskiej w Polsce z dnia 24. I. 1974 r.*, typescript, Archives of the Conference of the Polish Episcopate, Warszawa.

<sup>5</sup> Konferencja Episkopatu Polski, *Dyrektorium Duszpasterstwa Rodzin*, Warszawa 2003, Fundacja Vita Familiae, no. 84.

<sup>6</sup> Cf. Konferencja Episkopatu Polski, *W trosce o człowieka i dobro wspólne*, Warszawa–Tarnów 2012, Wydawnictwo Diecezji Tarnowskiej Biblos.

<sup>7</sup> Konferencja Episkopatu Polski, *W trosce o człowieka i dobro wspólne*, Warszawa–Tarnów 2012, Wydawnictwo Diecezji Tarnowskiej Biblos, no. 18.

<sup>8</sup> Konferencja Episkopatu Polski, *Chrześcijański kształt patriotyzmu*, Warszawa–Tarnów 2017, Wydawnictwo Diecezji Tarnowskiej Biblos.

research, locked within the areas of theology or religious studies. It concerns something else, which is revealed in research focused on examining the forces and processes shaping contemporary individual and social identity. From the viewpoint of creating national security, such research must not leave out new interpretation, reinterpretation and over-interpretation of patriotism. The researchers readily notice the contribution of Christianity to the Polish national identity, the understanding of the nation and collective memory.<sup>9</sup> At the same time, rarely, they recognise theological contents and religious thinking as capable of inspiring and supporting patriotic attitudes. Perhaps it is associated with two processes. Firstly with surrendering to the idea of inescapable Western laicization, as if nothing else can happen apart from building an a-theological and a-religious society, and secondly, with the very deconstruction of the notion of patriotism. Nowadays, this notion is perceived as an element of historical narrations, a needless anachronism, something that should be demythologized, humanized, globalized and pacified (since traditional patriotism is associated with national heroes, ethics of personal and collective life, fighting and dying for the homeland).

Patriotism is directly linked with creating Poland's national security. It is characteristic that when the National Security Strategy of the Republic of Poland of 2020 discusses the subject of national identity, it affirms primarily the fact that it is rooted in Christian heritage and universal values. Further on, the document unequivocally recommends that in order to consolidate this identity, it is necessary to: "Shape and develop patriotic attitudes as an indispensable factor in building community and national identity rooted in the Christian heritage and universal values."<sup>10</sup>

It is also important to investigate patriotic attitudes in the society with a view to creating national security. It should be assumed that national security is consolidated by patriotic attitudes, which are made up of: social responsibility of individuals and social groups with the parallel affirmation of communal value, rooted in the collective identity and directed at the development of the common good. Patriotic attitudes are characterised by strong emotional ties, the sense of belonging, loyalty and identification, as well as the sense of solidarity with other members of the group. Their power is co-participation in moral

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<sup>9</sup> Cf. K. Koseła, *Polak i katolik. Splątana tożsamość*, Warszawa 2003, Wydawnictwo Instytutu Filozofii i Socjologii PAN.

<sup>10</sup> *National Security Strategy of the Republic of Poland*, Warszawa 2020, p. 28.

values, creating familiarities in current interpersonal relations and diachronic emotional relations, for example, by referring to national heroes, historical creators of culture, statesmen known from history, merited national leaders. The strength drawn from co-participation in moral values enhances the sense of reasonableness of the existence and development of the homeland, liberates superior motivations, renders individuals able to do service, and offer generosity to the nation understood as a political community, built on the foundation of families and striving at sovereignty in the form of an independent state. Józef Marczak's statement provides an additional confirmation of the need for systematic studies of patriotic attitudes. The scholar and the research team he headed concluded that patriotism, understood as the knowledge of, attachment to and continuation of national traditions, love of the homeland and the readiness to make sacrifices for its defence and enrichment, should be in the first place, classified as one of the national values which in the past contributed to the creation of Poland's national security.<sup>11</sup>

Theologically inspired and supported patriotism should be investigated bearing in mind its usefulness in the processes of creating Poland's national security. On the other hand, building of security is associated with the state of social awareness as regards both the threats to and the potential of a political community. The point of departure for the perpetuation and development of a political community are individuals and social forms of their existence beginning with the family, various kinds of social groups, to the nation. Those individuals should be understood as psycho-physical and social entities. The area of national security is no exception in this respect. Besides political, economic or military factors, it is also created by macro- and mezzo-structural social variables. They are made up of social groups based on the ties of identity and community, which are established at the local, national and supranational level.

The postulated research is significant in the context of the growing globalization processes and migrations. Social and cultural changes taking place as a result of globalization, underlie universalization of culture, its westernization and disintegration. Those processes interfere with the sphere of identity and cause synchronization or hybridization of culture<sup>12</sup> as well as relativisation

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<sup>11</sup> Cf. J. Marczak, R. Jakubczak, A. Skrabacz, K. Gąsiorek, K. Przeworski, *Doświadczenia organizacji bezpieczeństwa narodowego Polski od X do XX wieku. Wnioski dla Polski w XXI wieku*, Warszawa 2013, Akademia Obrony Narodowej, p. 101.

<sup>12</sup> J.A. Scholte, *Globalization: A Critical Introduction*, Basingstoke 2005, Palgrave Macmillan.



of norms and identities. The phenomena of emigration and immigration are the causes of threats, which manifest themselves in cultural, religious, ethnic and social conflicts of far-reaching economic consequences. All those processes are important in the context of Poland's national security.

Another premise why theologically inspired and supported patriotism should be studied, is that there exists a need for concern about the policy of remembrance seen as a major component of building national security on "own" foundations, basing on the anthropological realism of a concrete society with its hundreds of years of experience in creating a political community, struggle for independence and sovereignty. Therefore, it is crucial that in the creation of the security policy, the potential of history for the present and for the future is taken into account. The policy of remembrance that takes into account the contribution of the Polish social and political thought (special account being taken of the national, Catholic social and conservative thought), has a unique capability of initiating and modelling patriotic attitudes. The need for research arises also from the need to present and popularize national history and its heritage, the need to popularize the phenomena in science and culture linked with the heritage of Polish history, but also the need to build respect, ties and co-responsibility for Polish cultural heritage, consolidate the awareness of its value, the need to perpetuate and protect.

The research focuses on theologically inspired and supported patriotism should be carried out systematically and regularly. This may help to elucidate the tendencies in society with regards to attitudes that are opposite to patriotism, that is those which are underlain by individual selfishness and national egoism. In the former case, it concerns indifference as regards the fate of the national community and the processes of creating its security. In the latter case, it concerns nationalistic behaviours, understood here as nurturing the sense of one's own superiority, while at the same time feeling contempt for other national communities or the community of mankind. The identification of nationalistic attitudes may contribute to protecting national symbols against their abuse in the realisation of particular political interests and thus their becoming a bone of contention within a political community. The concern for patriotic attitudes demands the concern for national symbols so that they have the power to integrate citizens around common values.

### 3. What? – What should be researched in Polish theologically inspired and supported patriotism?

The significant role of the teaching of the Church in Poland with regards to love of the homeland and the duty to defend it, has been widely described in literature and is a fact.<sup>13</sup> However, a question arises regarding the potential of the Church in this area at present and in the forthcoming future, the usefulness of that potential in developing national culture and inseparable from it national identity, in accordance with the centuries-long tradition.

Therefore, the current process of creating patriotic attitudes of the Polish clergy and theologians (teachers of religion) must be diagnosed and analysed. In view of the above, there seems to be a need to study one of the elements of internationalization of the Polish national, Catholic social and conservative thought, and promoting that thought using the results of the research of patriotic attitudes of young Poles. Thus, it would mean the formation of a next generation that would be aware of its own civil identity.

There is a need to investigate the contents concerning patriotism of the Poles in the statements made by the bishops, distinguished scholars, theologians and experts in the Catholic social teaching, contained in the relevant documents of the Conference of the Polish Episcopate. Important information concerning the understanding of patriotism can be found in the letters of the rectors of the Catholic University, which are read out in the churches in Poland on Easter and Christmas.

It is necessary to carry out questionnaire surveys and in-depth interviews with lecturers of Polish Catholic seminaries and theological faculties. The results should be analysed both qualitatively and quantitatively. This stage of the project should produce contents included in the final report and in the form of scientific articles written by members of the research team. The questionnaire surveys and interviews concerning patriotism, should take into account

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<sup>13</sup> C. Smuniewski, *Ku identyfikacji współczesnej drogi miłośnika ojczyzny. Z badań nad tożsamością i patriotyzmem w tworzeniu bezpieczeństwa narodowego Polski*, in: *Powrót do Ojczyzny? Patriotyzm wobec nowych czasów. Kontynuacje i poszukiwania*, C. Smuniewski, P. Sporek (eds.), 2nd revised and expanded edition, Warszawa 2021, Oficyna Wydawnicza ASPRA-JR, Wydawnictwo Instytutu Nauki o Polityce, pp. 19–50; C. Smuniewski, *Na drogach krzewienia miłości Ojczyzny. Patriotyzm jako fundament bezpieczeństwa narodowego*, in: *Klasy mundurowe. Od teorii do dobrych praktyk*, A. Skrabacz, I. Urych, L. Kanarski (eds.), Warszawa 2016, Wydawnictwo AON, pp. 39–51; C. Smuniewski, *Wychowanie do patriotyzmu. Studium o miłości ojczyzny w oparciu o biblijną i współczesną myśl katolicką*, in: *Bezpieczeństwo jako problem edukacyjny*, A. Pieczywok, K. Loranty (eds.), Warszawa 2015, Wydawnictwo AON, pp. 84–103.

references and contexts associated with: Poland's cultural heritage, sovereignty of economic local development and on the international arena, shaping pro-societal and pro-defence attitudes, challenges of the present times connected with the environment, demography, migrations and "temporal challenges" (e.g. natural disasters, epidemics, armed conflicts).

The concept of research concerning patriotism which is theologically supported by Poland's cultural heritage, whereby patriotism is perceived as a component of creating Poland's national security, assumes diagnosing, for explaining and describing patriotism internalised in Polish theological seminaries and theological faculties. It is mostly in theological seminaries and theological faculties that the future of the Church in Poland is shaped. They prepare not only priests to serve in parishes, but also teachers of religion, both clerical and lay. It is also assumed that the diagnoses of Polish historical remembrance require also a diagnosis of religious remembrance (theological remembrance which is present, for example, in a theology of nation<sup>14</sup> developed in Poland).

#### **4. How? – How should theologically inspired and supported patriotism be researched?**

##### Research methods

In order to implement the assumed goals of the project, at the outset, it is necessary to work out a research concept and select suitable methods. This requires a prior analysis of relevant literature. A subsequent stage of the undertaking will involve working out research tools (a survey questionnaire and an interview form). The research should employ the diagnostic survey method,<sup>15</sup>

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<sup>14</sup> Cf. *Spółeczeństwo teologiczne. Polska teologia narodu 966–2016*, P. Rojek (ed.), Kraków 2016, Wydawnictwo M; J. Buczek, *Teologia narodu w ujęciu wybranych polskich teologów*, Rzeszów 2014, Bonus Liber; J. Lewandowski, *Naród w dziejach Zbawienia*, Warszawa 2001, Wydawnictwo Uniwersytetu Kardynała Stefana Wyszyńskiego, "Adam" Oficyna Wydawniczo-Poligraficzna i Reklamowo-Handlowa; Cz. S. Bartnik, *Teologia narodu*, Częstochowa 1999, Tygodnik Katolicki *Niedziela*; J. Lewandowski, *Naród w nauczaniu kardynała Stefana Wyszyńskiego*, Warszawa 1982, Ośrodek Dokumentacji i Studiów Społecznych.

<sup>15</sup> Cf. E. Babbie, *The Practice of Social Research*, Boston 2020, Cengage Learning; T. Pilch, T. Bauman, *Zasady badań pedagogicznych: Strategie ilościowe i jakościowe*, Warszawa 2010, Wydawnictwo Akademickie "Żak".

which will be useful for making a diagnosis, for explaining and describing patriotism internalised in Polish theological seminaries and theological faculties and enriching the system of theoretical social knowledge that is associated with the processes of constructing patriotism, which is theologically supported by Poland's cultural heritage, and whereby patriotism is perceived as a component of creating Poland's national security. The technique of survey and interview should be used. With a view to the adopted research techniques, the following research tools will be employed: a questionnaire survey for lecturers at Catholic theological seminaries and theological faculties and an in-depth interview form for lecturers at Catholic theological seminaries and theological faculties. In addition, the method of deduction, analysis, synthesis, induction will be utilised.

The project's participants should include lecturers at Catholic theological seminaries and theological faculties, who will be subject to empirical research with the use of the survey and interview technique. It is those project participants that teach, and in the case of seminarians, form future priests and teachers of religion. Their present students will soon be active co-creators of the socio-political and Catholic social thought, and consequently, they will have an influence in shaping citizens' identity and attitudes. They will also shape the sense of intergenerational communion of the Poles.

Owing to the specificity of the researched group, it is necessary to see to the maximum availability of the assumptions of the project and its transparency. The information on research should be available not only on the website dedicated to the project, but also in the media valued by the Church community. To this end, the project may be covered in the weeklies *Gość Niedzielny* or *Niedziela*, which are among the most widely read opinion-forming magazines in Poland, and are published by church entities.

### Sequence of actions

In order to implement the goal of the project it is necessary to carry out comprehensive research in the following order:

- analysis of source literature;
- preparation and launching of a website with project information with parallel advertising in social media;
- consultations with experts (in the area of security studies, political science, theology, sociology, culture studies);

- construction of research tools for carrying out questionnaire surveys and in-depth interviews (project team and invited sociologists);
- carrying out questionnaire surveys and in-depth interviews with lecturers of Polish Catholic seminaries and theological faculties;
- analysis of the acquired material, examination of divergences and consistencies of information;
- synthesis of the content;
- preparation and publication of scientific texts (articles);
- elaboration of the research report;
- preparation and dissemination of recommendations for various institutions, account having been taken of the specificity of the addressees, the list of which should include ministries and entities subordinated to or controlled by ministers;
- preparing and submitting recommendations for Roman Dmowski and Ignacy Jan Paderewski Institute for National Thought Heritage;
- preparing and submitting recommendations for the National Culture Centre;
- preparation of materials (popular texts, multi-media presentations, podcasts) addressed to high school students for their personal use;
- preparation of materials (popular texts, multi-media presentations, podcasts) addressed to teachers for use in the schooling process (for example, during form periods);
- organisation of a webinar for high school teachers in order to acquaint them with the prepared materials and how they can be used;
- preparation of materials (popular texts, multi-media presentations, podcasts) addressed to youth groups and organisations (for example, Polish Council of Youth organisations, student societies, Scouts, academic pastoral centres, Catholic Youth Association, religious organisations, Academic League, Parliament of Students of the Republic of Poland);
- preparation and publication of the reports on the implementation of the project.

### Dissemination

A subsequent step in the implementation of the project should be the dissemination of the results and popularisation of knowledge concerning the potential

of Christian thought, Polish national heritage in the promotion of patriotic, pro-civic and pro-social attitudes. This end will be served by the research report and scientific articles. For this reason, it is necessary to prepare recommendations addressed to the above-mentioned entities, and materials for high school and academic teachers and youth. In addition, training for teachers (webinar) should contribute to the promotion of patriotic attitudes. Among the recommendations of special importance should be that which is addressed to the minister responsible for education and science, as one of the goals of the project is to prepare adequate materials for formulating the contents of curricula and school textbooks. However, the dissemination of the results should be mainly carried out through popularisation of information promoting patriotic, pro-civic and pro-social attitudes.

#### Project performance indicators

The analysis of project performance should be based on the following measures:

- number of academic teachers participating in empirical research;
- number of project website visitors;
- number of recommendations prepared for various institutions, account having been taken of the specificity of the addressees, the list of which should include ministries and entities subordinated to or controlled by ministers;
- number of online downloads of popular texts, multi-media presentations and podcasts;
- number of e-mail messages sent out to high schools promoting the materials prepared for teachers and students;
- number of e-mail messages sent out to youth groups and associations promoting the materials prepared for young people;
- number of teachers taking part in the webinar promoting materials prepared for use in the process of schooling.

### **5. So what? – What will the research effects help to understand and what should be their consequences?**

The postulated research concerning theologically inspired and supported patriotism should provide unique information which may be useful in the processes of creating Poland's national security and social policy. The results of the research

will help to elucidate better those contemporary tendencies with respect to the development of patriotism, which is not a state, but a process assuming diversified forms in society. This concerns both personal attitudes and group behaviours. Becoming acquainted with the contemporary patriotism of the Poles and its internal developmental tendencies which are stimulated by religious messages, will help predict the “tomorrow” of social behaviours. The acquired information will serve as an aid to forecast the future social potential of the Poles, their responsibility for the common good, involvement in the creation of national security.

The research will provide detailed information on patriotism internalised in Polish Catholic theological seminaries and theological faculties, where in a large measure, the future of the Church in Poland is shaped. One of the results will also be the enrichment of the system of theoretical social knowledge, primarily associated with the processes of constructing theologically inspired and supported patriotism, but also patriotism as such; and secondly, concerning the influence of academic teachers on shaping the attitudes of academic youth, modelling civic and pro-defence competences. The enhanced sense of social empowerment of academic teachers with respect to formulating, enhancing and internalizing patriotic attitudes of young people, as well as their sense of responsibility for thus emerging civil society.

A material effect of the project should not only be the research report and the accompanying scientific articles, but also the contents which will allow for the preparation of teaching materials for academic lecturers and high school teachers. The research results should be utilised as a basis for making recommendations addressed to various institutions and ministries which could have an impact on dissemination of patriotic attitudes and shaping national responsibility of the Poles, popularization of the knowledge of Polish cultural heritage. Such recommendations should take into account the specificity of the addressees, the list of which should include ministries and entities subordinated to or controlled by ministers; The main recommendations should go to: Ministry of Education and Science, Ministry of Culture and National Heritage, Ministry of National Defence, Ministry of the Family and Social Policy, Ministry of Sports and Tourism, Ministry of Justice, Ministry of Internal Affairs and Administration, Ministry of Foreign Affairs, Ministry of Health. The list of the addressees of the recommendations should also include: Conference of the Polish Episcopate (Commission for the Clergy, Commission for Pastoral Service, Commission for Catholic Education, Council for the Apostolate of the Laity, Council for the Pastoral Care of Youth, Council for Culture and Protection of National Cultural Heritage, Council for

the Family, Council for Social Affairs, Council for the Mass Media, Scientific Council), Deans of theological faculties, Rectors of theological seminaries.

A consequence of the research should be the promotion of patriotic attitudes in society, especially among high school and university students. It is possible thanks to coordinated activities in social media, popular texts, multi-media presentations, podcasts. The material should be distributed to high school students for personal reading, to teachers for the use of those materials in the schooling process (e.g. during form periods), youth groups and associations.

The efforts promoting patriotic attitudes, including pro-defence, pro-civic, pro-social attitudes, should be especially addressed to high school students attending uniformed services classes. The students of such classes declare their readiness to professionally participate in the future in creating national security in its various aspects, namely work in uniformed formations (for example, the Armed Forces of the Republic of Poland, the Police, Prison Service, Border Guards, State Fire Service, Forest Service). It should be anticipated that in future, they will actively partake in creating national security. Not without meaning is the fact that around 85% of the students of uniformed services classes declare that they are interested in the homeland and patriotism.<sup>16</sup> The interests that determine the lifestyles of the research subjects are local patriotism and love of the homeland.<sup>17</sup> Therefore, it is a group of people “susceptible” to internalization of values associated with respect, attachment to and co-responsibility for Polish national heritage, consolidation of the awareness of its value, the need to perpetuate and protect it. The analysis of the hitherto empirical research indicates the absence of programme items connected to getting acquainted with national and regional traditions,<sup>18</sup> which is additional evidence pointing to the need of carrying out the project within this group of participants.

An additional effect of the research, and thus an important source of information for future application projects, will be information concerning tendencies opposed to patriotism, which are underlain by egoism. This refers to both individual selfishness and national egoism. In the former case, it is indifference to the fate of the national community and the processes of creating its security, exclusive concern for one’s own existence of that of the immediate family,

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<sup>16</sup> Cf. I. Urych, *Potencjał obronny klas wojskowych. Teoretyczno-empiryczne aspekty kształcenia obronnego*, Wydawnictwo Akademii Sztuki Wojennej, Warszawa 2019, p. 151.

<sup>17</sup> Cf. I. Urych, *Potencjał obronny klas wojskowych*, p. 207.

<sup>18</sup> Cf. I. Urych, *Potencjał obronny klas wojskowych*, p. 182.



ignoring the wealth obtained, together with the indigenous history and culture, indifference to the fate of the compatriots. In the latter case – national egoism – it concerns this type of nationalism which nurtures the sense of one's own superiority at the same time feeling contempt for other national communities or the community of mankind.

## 6. Conclusion

In the Polish historical, social and security-related realities, the concurrence of the theological, social, political and defence thought implies the creation of national security though invoking Christian heritage, and the thought worked out by the Catholic social teaching. This means that in theologically inspired and supported patriotism, an important component of creating Poland's national security should be recognised. This component requires research and its social application with a view to the common good, which is the political community rooted in history and boldly entering the future. What is important is to effectively utilise the potential of the society in ensuring its security and development, promoting pro-civic and pro-social attitudes. Theologically inspired and supported patriotism favours in particular the consolidation of the national responsibility of the Poles. In this light, this article outlines the elaborated concept of research and its projected results with regards to patriotism theologically supported by the cultural heritage of Poland. The authors of that concept are convinced that the implementation of this research project and social utilisation of its effects will increase national responsibility of the Poles, and will contribute to the creation of national security. The postulated research will also present theology as a discipline which is in dialogue with other areas of knowledge, with a view to the good of human beings and social forms of their existence.

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## **St. Peter, Church and Religion as a Role Model for Modern Entrepreneurs**

### **Abstract**

Modern enterprises operate on the basis of the Industry 4.0 paradigm. Technology is becoming an inherent attribute of the economy, but at the same time, one should bear in mind the employees, who create enterprises, and the spiritual side, so as to maintain a balance between what is tangible and intangible. Religion and spirituality are intertwined and have an impact on business practice and corporate management. Research on a group of young people has shown that faith plays a vital role in running a business. Moreover, the sustainability and uninterrupted activity of the Church can be a model for many companies. Subordinating one's own affairs and individual ambitions to the common good and higher values, is the direction which managers of modern institutions can follow. Such an enterprise needs a leader, a charismatic leader who, as an intangible asset, will primarily see the value of the employees entrusted to him, and only then, the material value of the company. The personnel function and the humanistic approach are the key aspects of a well-functioning enterprise. The article analyses the role of St. Peter in managing the Church, and indicates the possibility of managing modern enterprises based on Church experience.

### **Keywords**

St. Peter, Church, religion, spirituality, organization, management, young entrepreneurs

## Introduction

The issues related to the functioning of European societies, as well as many communities in various parts of the world and the economic activities undertaken by them, are closely related to the Christian ethical and moral model. Various countries in Europe have Christianity as a foundation of their cultures<sup>1</sup>; same as other countries in America, Australia, and some parts of Asia, Africa.<sup>2</sup> Religious belief should be an appropriate ground for business ethics, as well as the basis for the moral activities of managers.<sup>3</sup> For many people, religion is important and plays an important role in shaping their own personality and social reality.<sup>4</sup> Unfortunately, it appears that for several years, in most modern Western societies, there is a widespread perception that religion and business are two separate things that do not merge and should not be muddled.<sup>5</sup> However, for many people, as mentioned above, including those in managerial positions, religion is important and they perceive the interpenetration of these two realities – the world of spirit and the world of business. Businesses and managers should strive to understand religious beliefs and support the religious attitudes of their employees as they will be more motivated, more productive and more involved in the life of the enterprise.<sup>6</sup> Religiousness has a positive effect on cooperation and assistance among employees. Religiousness and cooperation are two personal resources that can strengthen an organizational culture that promotes collegiality and mutual support. Thanks to religiosity, a group

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<sup>1</sup> H.J. Van Buren, J. Syed, & R. Mir, *Religion as a Macro Social Force Affecting Business: Concepts, Questions, and Future Research*, “Business & Society” (2020) 59 (5), pp. 799–822. <https://doi.org/10.1177/0007650319845097>.

<sup>2</sup> I. Ilyin, *Foundations of Christian Culture*, Waystone Press 2019; M.P. Cosgrove, *Foundations of Christian thought: Faith, learning, and the Christian worldview*, Kregel Academic, Grand Rapids, MI 2006.

<sup>3</sup> T.L. Fort, *Religion and Business Ethics: The Lessons from Political Morality*, “Journal of Business Ethics” (1997) 16, pp. 263–273, <https://doi.org/10.1023/A:1017935210929>.

<sup>4</sup> B.R. Smith, A. Lawson, J. Jones, et al., *Trying to Serve Two Masters is Easy, Compared to Three: Identity Multiplicity Work by Christian Impact Investors*, “Journal of Business Ethics” (2022) 179, pp. 1053–1070, <https://doi.org/10.1007/s10551-022-05156-4>.

<sup>5</sup> M. Lagace, *Can Religion and Business Learn From Each Other?*, Working Knowledge, HBS, Boston 2021.

<sup>6</sup> B. Ettorre, *Religion in the workplace: Implications for managers*, “Management Review” (1996) 85(12), pp. 15–19.

is formed that has certain common ideals that emanate from God.<sup>7</sup> The idea of Christianity as the people of God, was instilled and implemented by Jesus Christ and then proclaimed by his successors who make up the Church.

The Church, founded by Jesus Christ, has a divine and human dimension and cannot be considered only in legal and sociological terms.<sup>8</sup> The Church must be seen simultaneously as having two dimensions – the divine dimension and the human dimension. Thanks to this vision of the Church and the world, Christian managers base their actions on the one hand, on spirituality and on the other hand, on human experience. The model of Christianity that functions in the present world was developed on the basis of the teachings of Jesus Christ, initially by a group of Apostles led by Saint Peter (the most frequently mentioned disciple in the four Gospels)<sup>9</sup> and by the first Christians, and then perfected over the next generations. It is therefore worth analysing the role of Peter in the early Church and its influence on strengthening and transmitting the faith and the norms of social life. Peter played a key role in building up the Church, therefore careful analysis of his position among the apostles is extremely important. The two research questions posed in this article is:

Q1: Why was Peter considered the most important in the group, and why was his position distinguished among the Apostles?

Q2: Can we find a role model for modern managers, considering Peter's actions and personality as a leader?

In the conducted research, the position of Peter, which was empowered by Jesus, will be discussed. Peter could fulfil this position under the mandate and command of Jesus.<sup>10</sup> If Peter himself wanted to implement his plans, they always ended up being a failure.<sup>11</sup> By analogy, it can be construed that if the leader forgets the spiritual path of development and pursues his own plans, his agenda

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<sup>7</sup> D. De Clercq, I.U. Haq, & M.U. Azeem, *Religiousness, collectivism, and helping behavior: The invigorating role of abusive supervision*, "European Review of Applied Psychology" (2022) 72(2), 100702. <https://doi.org/10.1016/j.erap.2021.100702>.

<sup>8</sup> M. Żmudziński, *Prymacjalne tytuły Biskupa Rzymu*, "Studia Elbląskie" (2009) 10, pp. 147–156.

<sup>9</sup> R.E. Brown, K.P. Donfried, J. Reumann (eds), *Peter in the New Testament*, Minneapolis Paulist Press, 1973, p. 159.

<sup>10</sup> Mt 16, 18–19.

<sup>11</sup> Lk 5, 4–5; Mt 17, 29–31.

will not be successful for the whole endeavour.<sup>12</sup> Peter is an example of a person who never gives up. Although he had denied Jesus in the past,<sup>13</sup> he never gave up. He persevered. He coped with adversities and constantly improved himself, kept plugging away and pursued in adversities.<sup>14</sup> And that's what the manager must do. He cannot let adversity force him to stop what he is doing, what he is called to do. Since the Church and its teaching, and the developed social model have survived for two thousand years, it is worth analysing the phenomenon of the functioning of this divine-human organization. Perhaps it will be possible to respond positively to the research questions posed.

The article will analyse three events in the life of St. Peter, pointing to his election and the function of leading the others: (1) the dialogue with the Last Supper, (2) walking on the water, and (3) the miraculous catch of fish. The next section will discuss the statements of the early Christian writers regarding Peter and the original structure of the Church. Then, the human element of the Church will be revealed, which can be used by managers and leaders in organizations and enterprises. In its temporal dimension, the Church draws attention to people and proposes a system of care for individual groups and individual people. However, one should bear in mind the penetration of the divine dimension in the Church, and its salvific character, in order to avoid reducing the Church only to the role of being a charitable organization.

## Materials and methods

The research was carried out with the use of an inductive model, which includes the method of qualitative research with the use of empirical techniques, and with the use of a hypothetical-deductive model, which includes quantitative methods, allowing for the posing of research questions and the use of statistical tools. The use of both models made it possible to position the research in the group of research carried out using the mixed research method: quantitative and qualitative.

Two empirical techniques were used in the research, in the part using qualitative methods, namely (1) interviews in the form of a questionnaire and in-depth

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<sup>12</sup> H.T. Blackaby, & R. Blackaby, *Spiritual leadership: Moving people on to God's agenda*, B&H Publishing Group, Nashville, TN 2011.

<sup>13</sup> J 18, 15–27.

<sup>14</sup> J 21, 18–19.

interviews, and (2) the author's own observations. The interviews in the form of a questionnaire were conducted in two independent groups of respondents. The first group of respondents consisted of 81 people from 17 countries (Georgia, Iran, Morocco, Honduras, Belarus, Ukraine, Indonesia, Ethiopia, Nigeria, Vietnam, Russia, India, Kazakhstan, Azerbaijan, Kyrgyzstan, Uzbekistan, Tajikistan). In this group of respondents, the questionnaires were returned by all respondents, while out of the returned questionnaires, two were rejected due to inaccurate completion; therefore, 79 questionnaires were taken into account for the analysis.

In the first research group, the respondents answered questions related to entrepreneurship and the importance of religion in running a business. Young people aged 16 to 26 with ambitions to become entrepreneurs participated in the study. There were 40 men and 33 women in the research group, while six people did not complete the gender field. The second research group focused on Orthodox Christians in Ethiopia, to elicit the opinion of Christians who do not recognize the primacy of the papacy, the primacy of Peter, how they perceive the role of St. Peter. The second research group therefore answered questions related to the understanding of the position of St. Peter. The study was conducted in the form of surveys and in-depth interviews in a group of 15 respondents aged 20–30. There were 12 men and 3 women in this research group. The observation technique used in the study, carried out personally by the author, allowed for the assessment of entrepreneurship in African countries (Egypt, Tunisia, Ethiopia, Guinea Conakry), in the Middle East (United Arab Emirates, Jordan, Turkey), in Asian countries (Georgia, Armenia, Russia) in the United States and in selected European countries such Poland, France, Italy, Sweden, Portugal, Ireland and United Kingdom.

As part of the research, the method of quantitative research, with the use of statistical tools, was also employed to assess the occurring correlations (the Pearson correlation was used). The correlations between the age of the respondents and their entrepreneurial experience were examined, as well as the correlation between the gender of the respondents and their attitude to religion. The research was also carried out using the desk research method, which allowed the author to learn and analyse the issues of the primacy of St. Peter, available in the historical literature of the Fathers of the Church and in modern scientific journals. Thanks to this, it was possible to recognize the plan, as well as the formal and rhetorical structure of the author of the text describing St. Peter, along with the possibility of criticizing the biblical text, establishing its

original formulation in the original language. The study made use of original Greek texts to understand Jesus' words and the context of speech and dialogue.

## Results

### Dialogue at the Last Supper

It is interesting to note one of the tasks Jesus assigned to Peter at the Last Supper, namely that of strengthening the brothers. Peter was to become a person who, thanks to his life experience, would be able to strengthen his brothers. In Luke Chapter 22, in the account of the Last Supper, there is a significant dialogue between Jesus and Simon-Peter. When the hour came, Jesus sat down at the table and the twelve apostles with him: και οι δώδεκα απόστολοι μετ' αυτού<sup>15</sup> (and the twelve apostles with him).<sup>16</sup> The Evangelist's account shows that all the Apostles are with Jesus; however, Jesus at one point,<sup>17</sup> directly addresses Peter only, using the name: Simon, Simon, Σίμων Σίμων, and then he says of all the apostles: behold, Satan has asked to be sifted like wheat. Jesus uses the plural 'you' ύμᾶς while he continues again only with Peter. But I prayed for you ἐγὼ δὲ ἐδεήθην περὶ σοῦ (but I were bound about you). Jesus explains to Peter that his faith ἡ πίστις σου should not fail. Jesus again indicates that he prayed for Peter to have faith. In this passage, Jesus speaks of a special prayer for Peter. Even though the other Apostles are also around, Jesus addresses Peter directly and asks for Peter.

a) The role of St. Peter in strengthening brothers and carrying out common tasks  
Another important fragment of Jesus' statement to Peter is important: and you, after your conversion, strengthen your brothers και συ, όταν ποτέ επιστρέψης, στήριξον τους αδελφούς σου.<sup>18</sup> This is the command that Jesus again addresses directly to Peter. Jesus addressed his words to Peter and gave him an assignment,

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<sup>15</sup> All quotes in Greek were taken from the original Greek Bible called *Stephanus Textus Receptus*.

<sup>16</sup> Lk 22, 14.

<sup>17</sup> Lk 22, 31–32.

<sup>18</sup> Lk 22, 32.



a special task.<sup>19</sup> In this statement of Jesus, the conversation is directed toward the special role of Peter, after his conversion. Peter is to strengthen the faith of his brothers. And Peter begins to fulfil this command of Jesus when, in the company of John, he speaks to the men of Israel and says to them: and now brothers: Καί τώρα, ἀδελφοί.<sup>20</sup> Peter uses the same word: ἀδελφοί (brethren) which Jesus used at the Last Supper and which Jesus used to refer to those who do the Father's will. Whoever does the Father's will is my brother αὐτός μου εἶναι ἀδελφός.<sup>21</sup>

In the remainder of the above dialogue with the Last Supper, Peter assures Jesus of his total dedication to the point of imprisonment and death. And Jesus responds by calling him Peter. I tell you, Peter Λέγω σοι, Πέτρε.<sup>22</sup> Clearly, Jesus goes from Simon to Peter. The first part of the dialogue is a prayer for Simon, while the second part is the announcement of Peter's denial.

Peter was able to strengthen his brothers in the faith, as Jesus asked, thanks to his life experience, which he lived with Jesus. If Peter had relied only upon his own strength, he would have died many times. However, Peter always turned to Jesus for help in times of weakness and failure.

#### b) The importance of Peter in the early Church

When considering the role of Peter in the Church, attention should be paid to many events that show that Jesus wanted Peter to play a unique role in the group of the Apostles and in the future Church. Simon's name was changed to Peter to demonstrate his importance and his privileged place in the circle of students, and to indicate his mission as the Rock.<sup>23</sup> From the analysed events, his special role and full entrustment to Jesus can be clearly seen. Many times, Peter wanted to undertake various activities of his own initiative and even wanted to instruct Jesus, but it did not bring about any results. Peter was outspoken and

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<sup>19</sup> J. Maasen, *Peter the Leader: How an Imperfect Man Became the Leader of the Church*, Charisma Media, Lake Mary, FL 2009, p. 6.

<sup>20</sup> Acts 3, 17.

<sup>21</sup> Mt 12, 50.

<sup>22</sup> Lk 12, 34.

<sup>23</sup> P. Rabczyński, *Prymat Biskupa Rzymu w dialogu rzymskokatolicko-anglikańskim na forum światowym*, "Nurt SVD", (2020) 147(1), pp. 131–146.

always quick to get discussion started<sup>24</sup> but only full trust in Jesus and following His commands, were effective and brought positive results. After the resurrection of Jesus, Peter became the true leader of the Church, made the decision to complete the group of the Twelve,<sup>25</sup> spoke many times on behalf of the Apostles,<sup>26</sup> and decided to extend the Church to the Gentiles<sup>27</sup> and performed healings.<sup>28</sup>

### Walking on water

After Jesus' miraculous multiplication of the bread, the disciples, at His command, entered the boat and departed, while Jesus remained to disperse the crowds. In this place, the Gospel of Matthew offers the word disciples μαθητάς. When the disciples saw him walking on the lake, they were afraid, thinking it was a ghost, and screamed out of fear. The evangelist says that they screamed. He uses the plural, which suggests that all the disciples were scared that none of them recognized Jesus, thinking that it was a phantom and therefore shouted in unison. In the Greek text, the author does not use the verb 'thought', but the adverbial participle 'saying' – students say that it is the phantasm μαθηταί λέγοντες ότι φάντασμα είναι which means that everyone articulated their thoughts and said them aloud. Jesus immediately said to them: "Take courage! I am, do not be afraid!"<sup>29</sup>

Peter said: Lord if it is you, tell me to come to you on the water! And He said, Come! Peter got out of the boat and, walking on the water, came to Jesus.<sup>30</sup> Peter was the only one of the group of students in the boat who experienced the miracle of walking on water. He was the only one who asked Jesus if he could go to him, and Jesus heard Peter's request. However, the rest of this description shows that despite experiencing the miracle of walking on water, Peter doubted. At the sight of the strong wind, Peter was afraid and began to sink. He experiences his own weakness, and his limitations, he gets to know his fears. In the

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<sup>24</sup> H.T. Blackaby & R. Blackaby, *Spiritual leadership: Moving people on to God's agenda*, B&H Publishing Group, Nashville, TN 2011.

<sup>25</sup> Acts 1, 15.

<sup>26</sup> R.E. Brown, K.P. Donfried, J. Reumann (eds), *Peter in the New Testament*, Minneapolis Paulist Press, 1973, p. 160; Acts 2, 14.

<sup>27</sup> Acts 11, 1–18; Acts 15, 7–11.

<sup>28</sup> Acts 3, 4–6; Acts 9, 32–41.

<sup>29</sup> Mk 6, 50.

<sup>30</sup> Mt 14, 28–29.

moment of doubt, and fear, he begins to sink, even though Jesus is next to him. It was a lack of faith and fear that conquered him. This event showed that Peter was then still gripped by human limitations. As the Gospel relates, Jesus immediately stretched out his hand and grasped him, saying: Why did you doubt a little faith?<sup>31</sup> It turns out that without Jesus, Peter cannot do anything by himself. Without Jesus' helping hand, he simply drowns. Only constant communication with Jesus allows Peter to function properly. As John the Evangelist writes, Jesus said to the Apostles during the Last Supper: Whoever remains in me and I in him, will bear much fruit, because without me you can do nothing.<sup>32</sup> These words demonstrate that, on the example of Peter, it was in actual fact, only with Jesus that Peter could do many things that are humanly impossible.

### Catch the fish

Another example of Jesus' intervention and obedience to His words is the morning catch of fish. Peter and the rest of the apostles laboured in vain all night. This is an example of idle work that does not bring about the expected results. The overnight, fruitless catch of fish turned out to be unsatisfactory. Without Jesus, the labour did not produce any results. This is where Peter's faith and his obedience to Jesus' words are once again displayed. Christ said to Peter, "Put out into the deep and cast your nets for a catch." These words are not only a specific command, but a specific task addressed to Peter and to the rest who were with him. At this point, Jesus again addresses Peter directly: put out into the deep, *επαναγαγε εις το βαθος*. Addressing the singular and then using the plural, he speaks to Peter and to the others: throw the nets: *χαλασατε τα δικτυα*. Then Peter replies in his name, but also on behalf of the others, that they worked all night together; however, at Jesus' words, he would cast the nets. At this point, Peter only mentions, in the first person singular, that he will cast off the network *αλασω το δικτυον*. So, at Jesus' words, he would do the work again and cast his nets. When the catch was successful, Peter understood it was a miracle and fell at Jesus' knees and said, "Get away from me, Lord, for I am a sinful man." But Jesus said to Simon, "Don't be afraid; from now on you will catch men."<sup>33</sup>

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<sup>31</sup> Mt 14, 31.

<sup>32</sup> J 15, 5.

<sup>33</sup> Lk 5, 8.

## Apostolic Fathers on St. Peter

In the time immediately after the Apostles, those who still remembered the Apostles from their youth, and who even knew them personally, acted and wrote. Among these noble people, we include St. Clement, St. Ignatius and St. Polycarp. For the sake of their acquaintance with the Apostles, they were named by descendants as apostolic fathers. In their statements and numerous writings, they referred to the role of Rome and the importance of papal primacy.<sup>34</sup> Saint Clement, in the Letter to James, presents Peter as the first fruit of Jesus and indicates that Peter became the foundation of the Church.<sup>35</sup> A similar expression is used by Saint Irenaeus, a student of St. Polycarp, in his letter Against Heresy, in Book 3, where he wrote that Peter and Paul laid the foundations of the Church.<sup>36</sup>

From the beginning, the Church passed on the tradition that Peter and Paul were the builders of the Church, that they played a key role in the early history of the Church. Moreover, in many apostolic epistles and the epistles of the Fathers of the Church, Peter is designated as the head of the Apostles. St. Ignatius of Antioch, in his letter to the Smyrnaeans, in Chapter 3, writes about the appearance of Jesus.<sup>37</sup> Jesus came after his resurrection to those who were with Peter and told them to take him, touch him and see that he was not a spirit. Ignatius emphasizes that Jesus came to those who were with Peter. This sentence can be interpreted that only those who are with Peter can meet Jesus. Ignatius also points to the importance of the Roman community of the Church, which leads the other communities.<sup>38</sup> In this letter, Ignatius emphasizes the role of the Roman community as the one that guides love or unity in a broader sense.<sup>39</sup>

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<sup>34</sup> S.K. Ray, *Upon this rock: St. Peter and the Primacy of Rome in Scripture and the Early Church*, Ignatius Press, San Francisco, CA 1999.

<sup>35</sup> Saint Clement, *Epistle Saint Clement to James*, <https://www.biblestudytools.com/history/early-church-fathers/ante-nicene/vol-8-third-fourth-centuries/pseudo-clementine-literature/epistle-of-clement-to-james.html> (14.11.2022).

<sup>36</sup> Saint Irenaeus, *Saint Irenaeus Against Heresis*, <https://www.newadvent.org/fathers/0103303.htm> (14.11.2022).

<sup>37</sup> Saint Ignatius, *The Epistle Saint Ignatius to Smyrnaeans*, “Early Christian Writers”, <http://www.earlychristianwritings.com/text/ignatius-smyrnaeans-hoole.html> (14.11.2022).

<sup>38</sup> M. Wojciechowski, *Początki Kościoła*, Petrus, Kraków 2022, pp. 203–205; Ignace d’Antioche, & Polycarpe de Smyrne, *Lettres, Martyre de Polycarpe*, P.Th. Camelot (ed.), 1989, <https://sourceschretiennes.org/collection/SC-10> (14.11.2022).

<sup>39</sup> L. Misiarczyk, *Prymat Kościoła – Biskupa Rzymu w źródłach chrześcijańskich II wieku*, “Vox Patrum” (2004) 24 (46–47), pp. 51–77.

### The phenomenon of Peter and the primacy and the possibility of influencing enterprises

The Roman Popes are the heirs of the Apostle Peter, but also of all culture embedded in the Roman Empire.<sup>40</sup> From the very beginning, the Church lives in the awareness that there is the same relationship between the Bishop of Rome and the bishops of the whole Church, as between St. Peter and the rest of the apostles.<sup>41</sup> The Church is a *communio hierarchica* in which an important element is the college of bishops, with a visible centre of unity, in the bishop of Rome.<sup>42</sup> The scope of this function was to encompass all that Christ had accomplished as part of his saving mission.<sup>43</sup> As with the other apostles, so now the teaching of the successor of Peter, in conjunction with the entire college, i.e. the solemn teaching of the College of Bishops with the head, i.e. Peter, preserves that which is unchanging.<sup>44</sup>

After conducting Bible and scientific journal-based studies of literature, it is clear that Peter held a privileged position among the Apostles, because he was chosen as a leader by Jesus. He was given the keys as a sign of governing the congregation (Jesus assembly) entrusted to him.<sup>45</sup> Therefore, it is possible to answer the research question Q1 that Peter, despite his human shortcomings, was a leader for the Apostles and then for the early Church, because this was the will of Jesus himself.

### Religion and entrepreneurship among young people

The survey was conducted in October 2022 on a group of 81 respondents from 17 countries. All respondents completed and returned the questionnaires. However, 79 questionnaires returned were used for the analysis, as two were incorrectly completed and were not taken into account. 40 men and 33 women took

<sup>40</sup> M.P. Barbato, *Geopolitics of Papal Traveling: (Re)constructing a catholic landscape in Europe*, "Religions" (2020) 11 (10), 525, <https://doi.org/10.3390/rel113040339>.

<sup>41</sup> K. Dullak, *The highest administration in the Church and supporting authorities*, "Studia Koszalińsko-Kołoobrzęskie" (2011) 16, pp. 49–58.

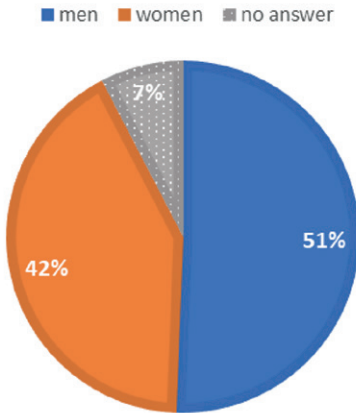
<sup>42</sup> J. Majewski, *Ecclesia "in" et "ex" Ecclesiis Teologiczna debata między Walterem Kasperem a Josephem Ratzingerem o relacji między Kościołem powszechnym a Kościołem lokalnym*, "Forum Teologiczne" (2007) 8, pp. 31–44.

<sup>43</sup> M. Żmudziński, *Chrystologiczny paradygmat funkcji św. Piotra i jego następców*, "Studia Warmińskie" (2020) 57, pp. 157–166.

<sup>44</sup> P. Roszak, *Can the Pope Change Tradition? On Tradition as a Principle of Progress in the Light of Thomas Aquinas' Theology*, "Wrocław Theological Review" (2021) 29 (1), pp. 251–267.

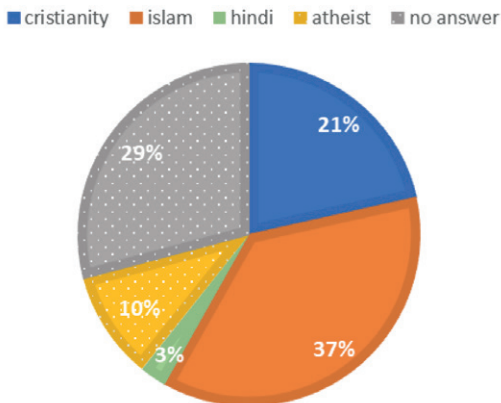
<sup>45</sup> M. Wojciechowski, *Początki Kościoła*, Petrus, Kraków 2022, p. 31.

part in the study, while six people did not provide an answer about their gender. The gender structure of the respondents is shown in Figure 1.



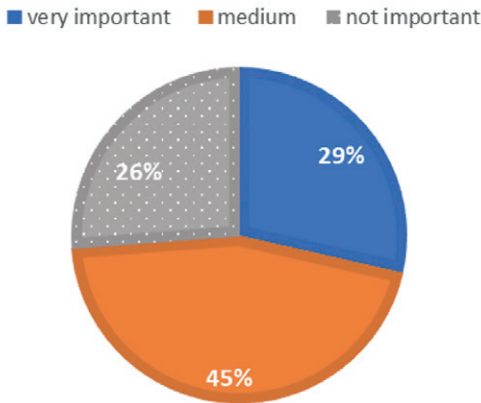
**Figure 1.** Gender structure of respondents

Young people from different countries, cultures and religions participated in the study. The largest group were the followers of Islam and Christians, while the followers of the Hindi religion constituted a minority among the respondents. Among the respondents there were also atheists and those who did not answer the question regarding their religion. The distribution of respondents by religion is shown in Figure 2.

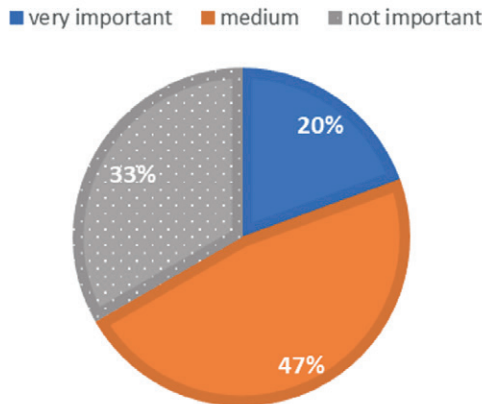


**Figure 2.** Structure of respondents by religion

Respondents were also asked about the importance of religion in their personal lives. Most of the respondents (56 people) considered religion and faith to be very, or moderately important, in their lives, while 23 people described religion as not being important in their lives. These answers show that despite the general conviction about secularization and the separation of religion from public and economic life, religion is important for most young people. However, it appears to be interesting if we examine at the religiosity of young people broken down by gender. The research shows that young men are more religious than young women as shown in Figure 3 and Figure 4.



**Figure 3.** The importance of religion and faith for men



**Figure 4.** The importance of religion and faith for women

Research results reveal that among young people, men are more religious, appreciate the importance of religion in their lives more, and appreciate the values of religion.

The respondents were a group of young people willing to run their own business (some of them already have experience in running a business). In order to verify the research problem, an analysis of the Pearson correlation between the age of the respondents and experience in running a business was carried out. The formula for the linear Pearson correlation is as follows:

$$r = \frac{\Sigma(x_i - \bar{x})(y_i - \bar{y})}{\sqrt{\Sigma(x_i - \bar{x})^2 \Sigma(y_i - \bar{y})^2}}$$

where  $x_i, y_i$  are the value of the variables  $x, y$  and  $\bar{x}, \bar{y}$  are the average values of these variables.

The random sample was 79, so it can be concluded that the correlation was carried out on a sufficient number and inference can be made. Pearson's correlation coefficient can be from minus 1 to plus 1. In our study, the result of the analysis was  $r = 0.035$ ;  $p > 0.05$  thus turned out to be statistically insignificant, which means that there is no correlation between age and experience in running a business in the group of respondents. In the next step, the correlation significance test should be examined. First, we calculated the significance test statistic according to the following formula:

$$t_{em} = \frac{r\sqrt{n-2}}{\sqrt{1-r^2}}$$

where  $r$  – the value of the Pearson coefficient;  $n$  – sample size then the critical value is determined  $t_{cr}$  and the critical area is determined

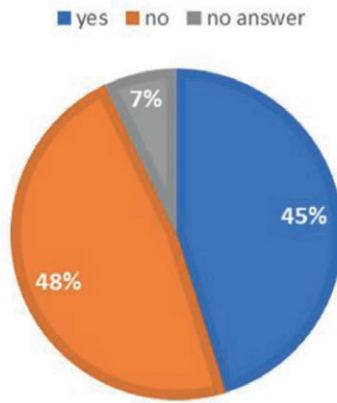
$$(-\infty; -t_{cr} > U < t_{cr}; +\infty)$$

The critical area is calculated for the quantile where  $1 - \frac{\alpha}{2}$  is a confidence level. Using the t-Student table, is determined.

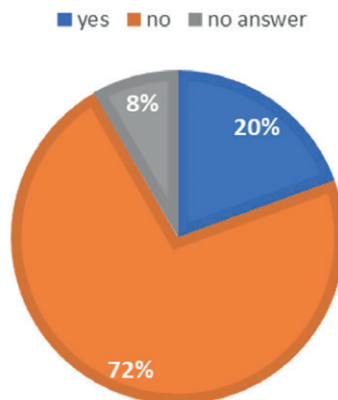
In our case  $t_{em} = 0,3074$  while  $t_{cr} = 1,66$  therefore our score does not belong to the critical area and the correlation is not significant.



When asked about the opinion on the role of religion in running a business, 19 men responded that religion helps in business, while among women only seven said that religion was helpful in business. Again, the results of the research clearly showed that more men than women appreciate the fact that religion supports economic activity. Young men are religious and are able to combine religion with running a business and perceive that spiritual values help in carrying out professional and economic activities. The percentage distribution of the responses among men and women is shown in Figure 5 and Figure 6.



**Figure 5.** Does religion help in running a business according to men?



**Figure 6.** Does religion help in running a business, according to women?

The results of the research show that young people are mostly believers and, according to them, religion is important and connected with running a business. This allows us to conclude that young businessmen will shape their economic activities on the basis of moral and ethical principles and will adhere to religious premises.

### The meaning of St. Peter for Orthodox youth in Ethiopia

Ethiopia is a country where Orthodox Christianity is the dominant religion. Thus, the primacy of Peter and the papacy are understood differently than in Catholicism. An interesting problem, therefore, was to examine the role of St. Peter. Is Peter's attitude important and can he be an example to follow? Surveys and in-depth interviews were conducted in Ethiopia on a group of 15 young people during the author's stay in that country. According to the conducted surveys and interviews, young Orthodox Ethiopians perceive St. Peter as an important figure in the early Church and see him as a leader who led the other apostles.

## Discussion

The ideas that are fundamental in the functioning of the Church, based on the teachings of Jesus and then Peter and his successors, can now be found in the teachings of management.

One of the representatives of management who drew attention to the issues of hierarchy, subordination and unity of command in the organization was H. Fayol. Fayol, based on his own observations made during the management of the company, established fourteen principles, most of which are directly related to people and underpin the success of the organization.<sup>46</sup> The principles developed by Fayol are consistent with the principles of the functioning of the Church. Authority can be distinguished among them. As in the Church, there must be a figure of authority in the company who understands that authority is necessary in order to get work done. Without authority, everything would be a mess and the work would not be performed in the right time and high standards.

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<sup>46</sup> C.A. Rodrigues, *Fayol's 14 principles of management then and now: A framework for managing today's organizations effectively*, "Management Decision" (2001) 39(10), pp. 880–889.

Another principle is the unity of command – this principle is based on the fact that each subordinate should receive orders issued by only one person: his superior, the manager.

Another principle is the unity of management, which means that in each team, there should be one manager and one goal of action, implemented by all. The principle of unity of command (subordinates are always managed by one superior) should not be combined with the principle of unity of management (one manager, one plan). The difference lies in the fact that the uniformity of the management ensures efficient organization of the team, and the uniformity of command-making affects its proper functioning. It is important for the organization to subordinate the personal (individual's) interest to the general interest, that is, the interests of employees or groups cannot override the interests of the organization as a whole.

Another principle concerns remuneration, which should be fair for both employees and employers. Employees are to be encouraged to bring all their goodwill and devotion, but must be treated with kindness and fairness.

A hierarchical structure plays an important role in the company, meaning a linear ranking of management positions on the basis of subordination (from the highest to the lowest level), which must be followed. Command structures, with the duty of quick action, are necessary. Hierarchy as a structure postulated by Fayol, is known from the very beginning in the Church, which is one of the most hierarchical organizations in the world.<sup>47</sup> Staff harmony (fr. *esprit de corps*) – a sense of community of staff. Teamwork – a sense of unity and belonging to one group, should be accepted and maintained for work efficiency. Stability of staff – avoiding large turnover of employees, which adversely affects the legitimate functioning of the organization.<sup>48</sup> The rapid development of technology in the twentieth and twenty-first centuries allowed for the creation of digital enterprises based on the Industry 4.0 paradigm, where there is communication between the machine and the machine, where databases and big data operate, where robots perform more and more bodily and intellectual activities previously assigned to humans, which requires the transfer of properties and functions typical of the human species to robots. All this poses a risk of weakening the

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<sup>47</sup> Ch. Gillis, *Roman Catholicism in America*, Columbia University Press, New York 2019.

<sup>48</sup> H. Fayol, *Administration industrielle et générale*, Dunod 1999; H. Fayol, & J.L. Peaucelle, J.L., *Administration industrielle et générale: 3e partie: observations et expériences personnelles*. Université Paris I, Panthéon-Sorbonne, Institut d'administration des entreprises 2000.

spirituality and emotionality of a person and leads to impoverishment of the personality. Therefore, it is extremely important to remember about the subjective role of man in the organization.

An economy that does not take into account the ethical dimension and does not seek to serve the good of man – every person and the whole person – does not even deserve to be called an “economy.”<sup>49</sup> Man does not live only by mundane matters, but always longs for what is extra-terrestrial.<sup>50</sup> The social teaching of the Church and the principles of enterprise functioning is based on certain common anthropological and social foundations.<sup>51</sup> Research conducted among young people confirms that there are values resulting from religion that are important in everyday life as well as are valuable and are instrumental in running a business.

The concept of servant leadership, first exemplified by Jesus and then St. Peter, was introduced by Robert K. Greenleaf in 1970.<sup>52</sup> This style was adopted by many successful leaders. It is important that the leader is not above those he leads.<sup>53</sup> Servant leadership can be a very effective style of influence on the group towards achieving organizational goals.<sup>54</sup> Leadership plays a key role in building trust within the teams operating in the organization. The servant leadership model strengthens and binds the members of the organization and stimulates mutual relations contributing to greater commitment.<sup>55</sup>

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<sup>49</sup> John Paul II, Ośrodek na XXXIII Światowy Dzień Pokoju 1 stycznia 2000, “L’Osservatore Romano” (2000) 1 (21), pp. 7–8.

<sup>50</sup> G. Consolmagno, *Space and the Papacy*, “Religions” (2020) 11(12), 654, <https://doi.org/10.3390/rel11120654>.

<sup>51</sup> A. Dietrich, A. Masingue, & E. Baruteau, *From social doctrine of the church to liberated enterprise: an analysis of Christian leaders’ discourses*, “Recherches en Sciences de Gestion” (2021) 142(1), pp. 245–269.

<sup>52</sup> R.K. Greenleaf, *Servant Leadership*, New York, NY and Mahwah 1970.

<sup>53</sup> R.K. Greenleaf, *Servant leadership: A journey into the nature of legitimate power and greatness*, Paulist Press, Mahwah, New Jersey 2002.

<sup>54</sup> L.W. Boone, & S. Makhani, *Five necessary attitudes of a servant leader*, “Review of Business” (2012) 33 (1), pp. 83–96.

<sup>55</sup> I.M. Obi, H. Aaldering, K. Bollen, W. Robijn, & M.C. Euwema, *Servant/Authoritarian Leadership in Convents, Team Trust, Engagement and Commitment*, “Journal of Management, Spirituality & Religion” (2022) 19(2), pp. 186–214, <https://doi.org/10.51327/YXBE4309>.

Business should exist for people. It is people, not capital or raw material that develop an economy. To work is to create, to create is to be human.<sup>56</sup>

The role of Peter as a leader who, despite his shortcomings and weaknesses, his tendency to be impulsive or quick to speak and act without deep thought, can be a role model for contemporary managers. This is because Peter transforms or perfects his behaviour and becomes strong and persistent. He strives to achieve his goal, bearing in mind his weaknesses, at the same time aware of the servant role towards other people. We can therefore answer the research question Q2 that Peter can be a perfect example of a manager, a leader for people who manage enterprises and run their own business.

## Conclusions

The principles developed by the Church concerning leadership, hierarchy, people and human work are also important in economic life. In the example of St. Peter and his authority in the Church, you can look for analogies in business management. By forgetting ourselves and focusing on our employees instead, we can move toward servant leadership. Thanks to sincere motivation and willingness to serve, we maintain the proper attitude of a manager, leader and coach. In Peter's attitude, we see his development as a servant-leader because he took care of the people entrusted to him and considered them a top priority. Managers can learn from Peter as they face organizational challenges, by putting the needs of employees and customers first.

Moreover, in her teaching, the Church advocates an economic system that opens up wide opportunities for development for every human being and appreciates the dignity and freedom of human work and the interdependence between work and capital. In the ethical reflection on enterprises, present in Catholic social teaching, two levels are clearly visible: enterprises as a community of people led by a leader, and enterprises as a meeting place for capital and work. The anthropological and deeply humanistic concept of enterprise presented by the Church does not undermine its economic aspects but puts at the centre, the human person, the creator of social life.

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<sup>56</sup> A. Widmer, *The Art of Principled Entrepreneurship: Creating Enduring Value*, BenBella Books, 2022.

Looking more broadly at religion and religiosity, qualitative and quantitative research has shown that young people are religious and recognize the importance of faith and religion in running a business. Moreover, research shows that young men are more religious than young women, and that men recognize and appreciate the positive role religion plays in business management.

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## **Application of Catholic Social Teaching in Finance and Management**

### **Abstract**

In dominating narratives, economics has been portrayed as hard science, based on complex mathematical equations and rigid statistical models. It seems to be overlooked that it belongs to the domain of social sciences and that its roots stem from philosophy and ethics. After all, many classical economists were either ethicists (A. Smith) or clergymen (T. Bayes). Today's managers also seem to be motivated mainly by the desire to increase their company's profits. However, if managers wish to become both effective and respected leaders for their teams, they should build their power on ethical principles deeply rooted in Catholic Social Teaching. The purpose of the present paper is to attract attention to the relation of economics, management and religion. Behavioral economics and management come to our aid here by emphasizing that, when making decisions related not only to financial markets but also to managerial tasks, what matters is not only factors that are strictly financial, but also those are related to psychology or ethics. Using the example of ethical investing and faith-based funds or stock indexes the Authors show that Christian values and the social teaching of the Catholic Church are still important to some participants in the financial markets.

### **Keywords**

Catholic Social Teaching, religion, ethical investing, management, leadership, parables

A classic theory of finance is based entirely on the concept of an economic human, so-called *homo oeconomicus*, and places egoism and cold-blooded optimization at the helm. An ideal representative of this classical model has constant preferences that fulfill a series of axioms, always makes optimal choices, does not exhibit passion, and is generally guided by maximization of their usefulness in accordance with the concept of utilitarianism. However, economists agree that classical economic theories have become less and less useful in explaining financial reality and predicting the future.

Consequently, behavioral economics has replaced rational humans, known as *Econs*, with the *homo sapiens* model, known simply as *Humans*.<sup>1</sup> According to R. Thaler, a Nobel Prize laureate, this new view of economics should encompass all factors that influence investment decisions, especially those allegedly irrelevant ones, known to classical economic theories as SIFs (*Supposedly Irrelevant Factors*). Among them are factors rooted in psychology; those described in economics and behavioral finance theories (intuitive thinking, personality traits, gender); cultural factors described in intercultural management literature (patterns of thinking, feeling, and behaving that differentiate members of the given culture from others)<sup>2</sup>; or ethical factors associated with the concept of socially responsible investing (one's own religion or moral values).

Management theories seem to be very much focused on effectiveness and ability of the manager to make his or her company profitable. However, a closer look at management gurus and deeper analysis of their ideas<sup>3</sup>, clearly demonstrates that meaningful management concepts have a lot in common with the message of the New Testament parables, as well as with modern Christian thought based on Jesus' teaching.

The main objective of this study is to prove that Christian values and the social teaching of the Catholic Church are still important, not only to some participants in the financial markets, but also to leaders who are not just profit-oriented, but rather, act for the sake of their teams and other stakeholders. Due to the progressive de-Christianization and secularization of societies, applying a religious criterion in the contemporary financial world is a significant matter.

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<sup>1</sup> R. H. Thaler, *Behavioral Economics: Past, present, and future*, "American Economic Review" (2016), 106 (7), p. 1578.

<sup>2</sup> M. Czerwonka, *Cultural, cognitive and personality traits in risk-taking behaviour: Evidence from Poland and the United States of America*, "Economic research-Ekonomska istraživanja" (2019) 32(1), pp. 894–908.

<sup>3</sup> T. Hindle, *Guide to Management Ideas and Gurus*, Vol. 42., 2008, wyd. John Wiley & Sons.

The paper is organized as follows. The role of economics in Catholic Social Teaching on the basis of encyclicals and apostolic exhortations are described in Section 1. Ethical investing, as an example of practical application of the teaching of the Catholic Church in the domain of finance, is described in Section 2; and an application of ethics into management is addressed in Section 3. A conclusion to the paper can be found in the final section.

## 1. Economics in Catholic Social Teaching

In its teachings for the betterment of the society, the Catholic Church does not systematize the concepts of economics, finance or investment. The position of the Catholic Church on matters of economics is included in the so-called Catholic Social Teaching, (CST). It is a relatively new scholarly discipline, established in the late 19th and early 20th century. The subject of interest here is a human being living in various communities and societies. CST is composed of four domains: 1) history, 2) theological and biblical anthropology and the anthropology of philosophical integral personalism, 3) social and economic ethics, as well as 4) applied social and economic ethics.<sup>4</sup> CST is universal, because it provides universal and objective values and rules, as well as their theological and philosophical justifications. Reference to God does not have to be considered as an expression of confessionalism, because numerous philosophical rationales are also provided.

Aside from CST, the Catholic Church tries to raise issues related to human activities in the financial domain by other means, such as encyclicals or apostolic exhortations. Numerous documents of pastoral papal teaching contain a growing number of thoughts on personal and social responsibility as well as corporate and investor responsibility. According to the Church, investing is never void of social, cultural, and ecological consequences. The Church does not present any alternative law or economic order, but it draws attention to the necessity of connecting the world of finance with ethics (*Caritas in veritate* encyclical<sup>5</sup>), issues

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<sup>4</sup> C.E. Curran, *Catholic social teaching, 1891–present: A historical, theological, and ethical analysis*, 2002, wyd. Georgetown University Press.

<sup>5</sup> Benedict XVI, *Caritas in veritate*, Vatican City 2009, [http://www.vatican.va/content/benedict-xvi/en/encyclicals/documents/hf\\_ben-xvi\\_enc\\_20090629\\_caritas-in-veritate.html](http://www.vatican.va/content/benedict-xvi/en/encyclicals/documents/hf_ben-xvi_enc_20090629_caritas-in-veritate.html) (10.07.2021).

of social inequality (*Evangelii Gaudium* apostolic exhortation<sup>6</sup>); the necessity to protect the natural environment (*Laudato Si* encyclical<sup>7</sup>), as well as current social issues associated with the Covid-19 pandemic (*Fratelli tutti*<sup>8</sup>).

Covid-19 pandemic affected many aspects of life, among others people's attitude to religion and economic needs. In the context of post-COVID society, social and spiritual bridging holds significant importance as a means to address and mitigate polarization<sup>9</sup>. In the period after the COVID-19 pandemic, it is necessary to raise the importance of social and spiritual rapprochement as key elements of the renewal of society. Research presents positive correlation between impact of environment, social inequality and pandemic.<sup>10</sup> Post-covid era has decreased the willingness of people to social and economic needs during the financial crisis, that has been making a negative impact on mental health and has led to polarization.<sup>11</sup>

### The "Caritas in veritate" Encyclical

The "Caritas in veritate" encyclical was published by Pope Benedict XVI during the financial crisis of 2007–2009. One of the issues raised is, that the challenge which appeared during the economic and financial crisis is to demonstrate that one must not neglect or weaken such traditional rules of social ethics as transparency, honesty, or responsibility. "This is a human demand at the present time, but it is also demanded by economic logic."<sup>12</sup> Pope Benedict XVI emphasizes that justice refers to all stages of economic activity, because it always deals with

<sup>6</sup> Pope Francis, *Evangelii Gaudium*, United States Conference of Bishops, (2013), [http://www.vatican.va/content/francesco/en/apost\\_exhortations/documents/papa-francesco\\_esortazione-ap\\_20131124\\_evangelii-gaudium.html](http://www.vatican.va/content/francesco/en/apost_exhortations/documents/papa-francesco_esortazione-ap_20131124_evangelii-gaudium.html) (10.07.2021).

<sup>7</sup> Pope Francis, *Laudato si*, Vatican City 2015, [http://w2.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco\\_20150524\\_enciclica-laudato-si.html](http://w2.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco_20150524_enciclica-laudato-si.html) (10.07.2021).

<sup>8</sup> Francis Pope, *Fratelli Tutti*, Vatican City 2020, [https://www.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco\\_20201003\\_enciclica-fratelli-tutti.html](https://www.vatican.va/content/francesco/en/encyclicals/documents/papa-francesco_20201003_enciclica-fratelli-tutti.html) (10.07.2021).

<sup>9</sup> V. Judák (eds), *The importance of social and spiritual bridging in relation to post-covid society polarization in Slovakia*, "Acta Missiologica" (2022) 16 no. 1, pp. 126–137.

<sup>10</sup> P. Maturkanic, V. Judak (eds), *Catholic spirituality of north bohemia mission area and its future direction*, "Acta Missiologica" (2023) 17, 2, pp. 20–23.

<sup>11</sup> L. Ludvigh Cintulová, P. Beňo, T. Pavlovičová, *Aspects of social services and wellbeing in post covid era*, "Int J Health New Tech Soc Work" (2023) 18 no 3, pp. 106–114.

<sup>12</sup> Benedict XVI, *Caritas in veritate*..., 36.

human beings and their needs. “Locating resources, financing, production, consumption and all the other phases in the economic cycle inevitably has moral implications. Consequently, every economic decision has a moral consequence.”<sup>13</sup>

The Pope underlines that in order to function properly, the economy needs ethics, but not just any ethics, rather “an ethics which is people-centered.”<sup>14</sup> Benedict XVI provides numerous examples of ethical behaviour in the world of business: studies and formative programs in business ethics, ethical certificate systems, ethical banking accounts, ethical investment funds or ethical financing. However, the Pope also expresses his fear of excessive use of the adjective “ethical”. This word, if not used in a -precise way, may refer to highly diverse content, to such an extent that it may also encompass decisions and choices opposite to justice and true human good. “Efforts are needed – and it is essential to say this – not only to create “ethical” sectors or segments of the economy or the world of finance, but to ensure that the whole economy – the whole of finance – is ethical, not merely by virtue of an external label, but by its respect for the requirements intrinsic to its very nature.”<sup>15</sup>

In the Pope’s deliberations on economics, we can identify words of clear criticism. The Holy Father is very categorical in stating that economics, since a long time ago, has already joined the domains where the disastrous effects of sin are evident. “The conviction that the economy must be autonomous, that it must be shielded from ‘influences’ of a moral character, has led man to abuse the economic process in a thoroughly destructive way.”<sup>16</sup> Pope Benedict XVI also refers to Pope John Paul II, who cautioned that investing is always of moral, not just economic significance. In the encyclical letter from 1993, *Veritatis Splendor*, John Paul II reminds us that the Church has declared that certain acts are always wrong. Intentions may be noble, people may claim to be acting in good conscience and circumstances may mitigate personal responsibility but certain acts (for example, adultery, intentional killing of human life) are always evil.<sup>17</sup> “All this – it should be stressed – is still valid today, despite the fact that the capital market has been significantly liberalized, and modern technological

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<sup>13</sup> Benedict XVI, *Caritas in veritate*..., 37.

<sup>14</sup> Benedict XVI, *Caritas in veritate*..., 45.

<sup>15</sup> Benedict XVI, *Caritas in veritate*..., 45.

<sup>16</sup> Benedict XVI, *Caritas in veritate*..., 45.

<sup>17</sup> John Paul II, *Veritatis Splendor*, Vatican City 1993, [https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf\\_jp-ii\\_enc\\_06081993\\_veritatis-splendor.html](https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_06081993_veritatis-splendor.html), (21.10.2021).

thinking can suggest that investment is merely a technical act, not a human and ethical one.”<sup>18</sup>

### Evangelii Gaudium apostolic exhortation (2013)

*Evangelii Gaudium* is Pope Francis’ first apostolic exhortation. Although proclamation of the gospel in the contemporary world, as well as revival of the Church, are its main themes, it does include many excerpts that refer to social and economic issues, especially poverty and capitalism.

This points to a societal ethos where the pursuit of material goods and individual consumption takes precedence over values such as solidarity, social justice, and compassion. Consumerism, in this context, is seen as contributing to a mindset that prioritizes acquiring possessions over fostering a sense of responsibility towards others.<sup>19</sup> Pope Francis’ statements underscore a critique of a value system that prioritizes financial gains over ethical considerations and spiritual beliefs. He links this shift in priorities to economic crises, wealth concentration, and social inequalities, and urges a reevaluation of societal values and a renewed emphasis on ethical, inclusive, and spiritually grounded approaches to economic and social issues.<sup>20</sup>

Pope Francis cautions against the globalization of indifference, or disappearance of interest in the condition of the have-nots, replaced by concentration on one’s own consumption. He also criticizes subjecting economics to the laws of rivalry, as well as the culture of consumerism, which leads to objectification of the human factor to production. “Just as the commandment “Thou shalt not kill” sets a clear limit in order to safeguard the value of human life, today we also have to say “thou shalt not” to an economy of exclusion and inequality. Such an economy kills. How can it be that it is not a news item when an elderly homeless person dies of exposure, but it is news when the stock market loses two points?”<sup>21</sup> The exhortation reveals the views of the Head of the Catholic Church on contemporary economics. The paper highlights the potential negative

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<sup>18</sup> Benedict XVI, *Caritas in veritate*, 2009, 40.

<sup>19</sup> M. Lichner (eds), *Various aspects of understanding almsgiving in the context of solution of poverty in Aurelius Augustinus*, “Acta Missiologica” (2023) 17 no. 1, pp. 85–96.

<sup>20</sup> M. Lichner (eds), *Pope Francis and jews. The proposed possibilities of Jewish-Christian dialogue*, “Acta Missiologica” (2021) 15 no. 2, pp. 301–310.

<sup>21</sup> Pope Francis, *Evangelii Gaudium*, ..., 53.

consequences of an overly competitive and profit-driven economic system. In this context, we have to draw attention to the adverse effects of a culture dominated by consumerism, where material pursuits take precedence over social and ethical considerations.<sup>22</sup> On the other hand, this critique suggests a call for a more compassionate and socially responsible approach to economic practices, one that considers the impact on marginalized communities and promotes a more equitable. Promoting social cohesion, fostering community support, and addressing the systemic factors contributing to poverty are essential steps in improving the mental health outcomes for those facing economic challenges.<sup>23</sup> There is a need for a shift in societal values and economic priorities, advocating for a system that prioritizes solidarity, social justice, and the well-being of all, particularly those on the fringes of every society. The experience of poverty itself can be emotionally taxing, with individuals facing not only economic hardships but also social stigma and exclusion. The absence of a supportive community or network can exacerbate feelings of loneliness and contribute to mental health issues such as anxiety and depression.<sup>24</sup>

Francis considers prioritization of money over ethics and belief in God as a source of the problem. He compares contemporary fascination with profits, efficiency and infallibility of markets with worshipping the biblical golden calf instead of God. According to the Pope, the ideology that promotes the absolute autonomy of markets has led to mass-scale financial speculations and, as a result, to the global financial crisis. The Pope also remembers other effects of economic system deregulations, such as capital accumulation in the hands of few and the tyranny of the rich over the poor, interpreted as economic violence. This form of economic inequality is interpreted as a manifestation of economic violence, where the marginalized and economically disadvantaged face systemic injustices perpetuated by the powerful elite.<sup>25</sup>

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<sup>22</sup> Z. Budayová (eds), *The Impact of Modern Technologies on Life in a Pandemic Situation*, "Journal of Education Culture and Society" (2022) 13, no. 1, pp. 213–224.

<sup>23</sup> L. Ludvigh Cintulová, L. Radková, Z. Budayová, *Mental health of Roma women in post-covid era*, "Acta Missiologica" (2022) Vol. 16, no. 2, pp. 116–129.

<sup>24</sup> L. Ludvigh Cintulová, Z. Budayová, I. Juhásová, *Health of Roma People living in marginalized Communities in Slovakia*, "Clinical Social Work and Health Intervention" (2023) Vol. 14, no. 1, pp. 7–15.

<sup>25</sup> R. Králik (eds), *Compassion and Solidarity with the poor in Tahakh and Rabbinic Judaism*, "Acta Missiologica" (2022) 16, no. 1, pp. 154–168.

“I exhort you to generous solidarity and to the return of economics and finance to an ethical approach which favours human beings.”<sup>26</sup> The Pope appeals to political leaders, as well as financial experts, to consider ethics when introducing reforms. So far, ethics has been disdained as implementation of immeasurable values to the system that aims at bringing down economics to calculations and forecasts. The primary feature of solidarity and the catholic spirituality is the belief in the triune God, whose triunity – relationality transcribed into the ecclesial communion is considered to be the very foundation of every human coexistence, and consequently the variations of diverse social interactions.<sup>27</sup>

### The *Laudato Si* Encyclical Letter (2015)

*Laudato Si* (On Care for Our Common Home) is Pope Francis’ second encyclical letter, also known as the green encyclical. It addresses the broadly understood protection of the natural environment and care for the future of our planet. In *Laudato Si*, Pope Francis promotes a new lifestyle, which is not only in accordance with the principles of the Bible, but also brings harmony and the perpetuation of life in a happy and healthy way. Francis calls believers to cultivate a communion not just with God and human beings, but with the earth and its creatures, for we are called together into “a sublime communion.”<sup>28</sup> Pope Francis advocates for a transformative lifestyle aligned not only with biblical principles but also dedicated to fostering harmony and the continuation of life in a joyful and healthy manner. His call extends beyond the spiritual realm, urging believers to cultivate a profound communion not just with God and fellow human beings but also with the Earth and its creatures while emphasis on the environmental issues and family functions.<sup>29</sup>

In the first chapters of the encyclical, the Pope offers a short review of the various aspects of the current ecological crisis. He discusses issues such as pollution

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<sup>26</sup> Pope Francis, *Evangelii Gaudium*, ..., 58.

<sup>27</sup> P. Maturkanić, V. Judak (eds), *Catholic spirituality of north bohemia mission area and its future direction*, “Acta Missiologica” (2023) Vol. 17, 2, pp. 20–23.

<sup>28</sup> Pope Francis, *Laudato si*, 89.

<sup>29</sup> A. Mátejková, P. Tománek, *Family and Current Sociolegal Measures for its Members in the Slovak Republic*, in: *Strong Families – Strong Societies*, ed. E. Osewska, Krakow 2019: Uniwersytet Papieski Jana Pawła II, pp. 69–89.



and global warming, depletion of natural resources, including clean drinking water, and the loss of biological diversity. He also draws readers' attention to global injustice with respect to the poorest and excessive consumerism. "This same "use and throw away" logic generates so much waste, because of the disordered desire to consume more than what is really necessary."<sup>30</sup> The Pope also focuses on wastage of food and reminds us that food which is thrown out is food that is stolen from the tables of the poor.

In the consecutive chapters of the encyclical, the Pope analyzes the human factor of the ecological crisis. He criticizes the idea of unlimited growth, which presupposes a false belief that the resources of our planet are infinite, as it leads to "squeezing" them out to the maximum. He also points to a "false notion that "an infinite quantity of energy and resources is available, that it is possible to renew them quickly, and that the negative effects of the exploitation of the natural order can be easily absorbed."<sup>31</sup>

According to the Pope, ethical behavior occurs only when economic and social costs, resulting from the use of common environmental resources, have been recognized openly and when all those who incur them benefit from them as opposed to others or future generations. "As long as the clearing of a forest increases production, no one calculates the losses entailed in the desertification of the land, the harm done to biodiversity or the increased pollution. In a word, businesses profit by calculating and paying only a fraction of the costs involved."<sup>32</sup>

At the end of this encyclical, the Pope proposes a change to our own habits with regards to the protection of the natural environment, to increase and deepen daily ecological sensitivity, to educate towards the ecology, and even ecological conversion. Changing our lifestyle can cause exerting healthy pressure on those who hold political, economic, and social power. The Pope reminds us about consumer social responsibility and that purchasing is always being a moral, not just economic act. By means of our habits, we can avoid certain products being purchased, which decreases corporate profits and compels them to reconsider their environmental footprint and rethink their production models.

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<sup>30</sup> Pope Francis, *Laudato si*, 123.

<sup>31</sup> Pope Francis, *Laudato si*, 106.

<sup>32</sup> Pope Francis, *Laudato si*, 195.

### Fratelli tutti (2020)

*Fratelli tutti* (On Fraternity and Social Friendship) is Pope Francis' third encyclical. Among other topics, he refers to the current economic and financial situation associated with the COVID-19 pandemic. According to the Pope, fragility of the world's systems in the face of the pandemic revealed that not everything can be solved with the use of market freedom, and that aside from bringing back real politics that is not subject to financial dictatorship, "we must put human dignity back at the centre and on that pillar build the alternative social structures we need."<sup>33</sup> The Pope acknowledges a pressing need to find a solution to everything that violates fundamental human rights. He reminds that politicians should not concern most about a drop in the polls, but about finding effective solutions to "the phenomenon of social and economic exclusion, with its baneful consequences: human trafficking, the marketing of human organs and tissues, the sexual exploitation of boys and girls, slave labour, including prostitution, the drug and weapons trade, terrorism and international organized crime."<sup>34</sup>

## 2. Ethical Investing

When posing the question whether investing in accordance with our worldview and conscience pays back, and which investors select this type of capital investment, one must take a closer look at Socially Responsible Investing – SRI. This relatively young domain in the realm of Finance is close to behavioral finance, because, again, a human being with their psychological, cultural, and moral conditions appears in the centre of attention. Responsibility for the fate of an individual and the world is of key importance here. Individual worldviews as well as religious beliefs play an important role, as well. Aside from financial matters, investors also consider social, environmental, as well as ethical dimensions of their investment decisions. Since its inception, the concept of socially responsible investments has been strongly associated with religion. In Jewish or Christian faith, values (coded in the Old Testament) have been standing for a long time in opposition to gaining profits from usury (lending money at unreasonably high rates of interest). The lender, as well as transactional intermediaries and witnesses, were considered to be thieves. The history of socially-responsible

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<sup>33</sup> Francis Pope, *Fratelli Tutti*, 168.

<sup>34</sup> Francis Pope, *Fratelli Tutti*, 198.

investing in Europe has been strongly tied to religious organizations. As early as in 17<sup>th</sup> century England, we encounter the Protestant movement of the Religious Society of Friends, which propagated the ideas of social responsibility. In 1965, the Swedish church established Europe's first SRI investment fund, and in Germany, the first ethical funds were established by local churches in the 1990s. In France, the first SRI fund, *Nouvelle Strategie Fund*, was established in 1983 in Paris by N. Reille, a Catholic nun.

Ethical investing (or faith-based investing) is one of the forms of socially responsible investing, in accordance with the criteria and norms of the given religion. A good example of ethical investing can be provided by ethical indexes or ethical funds that operate on the basis of the teachings of world's leading religious faiths: the Catholic Church, Judaism, or Islam. The present paper will provide examples of investing in the spirit of the Catholic Church.

Studies show that factors associated with religious beliefs are of importance when making financial decisions. M. Czerwonka in cooperation with the Association of Individual Investors in Poland, conducted a study on a sample of 361 individual investors, which revealed that there is a relation between religiosity and inclination of investors to invest in SRI funds.<sup>35</sup> Religious and practicing individuals were more open to the idea of SRI than unbelievers. D. Arli and F. Tjiptono explored the relationship between consumer ethics, religiosity and CSR in the context of an emerging market.<sup>36</sup> The study revealed that intrinsic religiosity influences consumer perception towards the importance of various social responsibility domains.

Currently, the largest market of ethical investments in accordance with the doctrine of the Catholic Church, can be found in the United States of America. According to the guidelines of the United States Conference of Catholic Bishops (USCCB) – an institution that groups together all-American Catholic bishops – ethical investments with the spirit of Catholicism should: protect human life; promote human dignity; strive to limit the production of weapons; pursue economic justice; protect the natural environment; support CSR activities.

As a result of the above guidelines, a list of morally inadmissible activities has been constructed in relation to investing in the spirit of Catholicism. These refer

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<sup>35</sup> M. Czerwonka, *The influence of Religion on socially responsible investing*, "Journal of Religion and Business Ethics" (2014), 3 (1), pp. 1–10.

<sup>36</sup> D. I. Arli, F. Tjiptono, *Consumer Ethics, Religiosity, and Consumer Social Responsibility: are They Related?*, "Social Responsibility Journal" (2018), Vol. 14 No. 2, pp. 302–320.

to: abortion, contraception, research on embryos, racial and sex discrimination, pornography, and the production of weapons.

Faith-based or ethical funds avoid investing in companies that offer products or services that stand in opposition to the teaching of the Catholic Church. According to the investment policy of the ethical funds, those who are excluded from the investment portfolio are select companies that produce drugs (e.g., pharmaceutical companies that produce abortion-inducing and contraceptive drugs), hospitals, insurance companies, and companies that support Planned Parenthood (an American organization of conscious parenthood and sexual education associated with access to legal contraceptives and abortion in the USA), as well as various producers and distributors associated with media (porn industry).

Ave Maria Mutual Funds is one of the oldest and best-known group of American ethical funds.<sup>37</sup> It is made up of five individual funds (*Rising Dividend Fund*, *Growth Fund*, *Value Fund*, *World Equity Fund* as well as *Bond Fund*), which make it possible for investors to allocate their resources in accordance with their convictions. The funds avoid investing in companies that offer products or services that stand in opposition to the teaching of the Catholic Church. The most important negative criteria are abortion, pornography, embryo research, as well as activities directed against the institution of marriage or family.

Avoiding investments in profitable but unethical businesses can cause religious investment funds to sacrifice returns for purity. A study by L. Ferruz, F. Munoz, and M. Vargas' confirms that managers of religious mutual funds do not perform as well as managers who do not limit their investments based on religious considerations and accept lower returns as the price of not investing in "sinful" industries.<sup>38</sup> However, A. M. Gómez-Bezares et al. states that the performance of the ESG indices is equal to, or better than, the performance of conventional ones and during the Covid-19 crisis, displays greater resilience against the market indices.<sup>39</sup>

Ethical stock indexes form another example of implementing principles of the Catholic church faith in the "world of finance." The first stock market

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<sup>37</sup> Ave Maria Mutual Funds (avemariafunds.com), (29.01.2024).

<sup>38</sup> L. Ferruz, F. Munoz, M. Vargas, *Managerial abilities: Evidence from Religious Mutual Fund Managers*, "Journal of Business Ethics" (2012) 105 (4), pp. 503–517.

<sup>39</sup> A. M. Gómez-Bezares, F. Gómez-Bezares, *Catholic Social Thought and Sustainability. Ethical and Economic Alignment*, "Journal of Risk and Financial Management" (2021), 14 (1) 11.

Domini 400 Social Index appeared already in 1990. In June 2009, the Domini 400 Social Index changed its name to FTSE KLD 400 Social Index, and in 2010, it was absorbed by the MSCI group. The MSCI USA Catholic Values Index gathers together 400 companies selected on the basis of the guidelines of the USCCB with regards to socially responsible investing.<sup>40</sup> Each company is assessed on the basis of the following criteria: protecting human life (zero tolerance for companies that directly or indirectly support abortion, human cloning or produce contraceptives); promoting human dignity (respect of the rights of women and minorities, access to healthcare); reducing arms production (companies whose profits come from the production of arms in percentage greater than 5% of overall revenues are excluded from the index); pursuing economic justice (the index avoids investing in companies associated with the so-called *sweatshops*); protecting the natural environment; encouraging corporate responsibility. The remaining criteria are associated with engagement in tobacco and alcohol industries.

### 3. Application of ethics into management

For today's managers, leadership is becoming more and more challenging. In 1981 John Paul II, in his Encyclical *Laborem Exercens*, underlined the need to constantly consider the nature and place of human work and also the huge responsibility of employers as to how they manage employees.<sup>41</sup> At the end of the Encyclical, he cited the words of Pastoral Constitution on the Church in the Modern World *Gaudium et Spes*<sup>42</sup>, on how important it is that through work, we not only increase "the fruits of our activity", but also that "human dignity, brotherhood and freedom" must increase on earth.<sup>43</sup>

Therefore, it is important to deliver some concrete guidance for managers as a guide for them to realize the above-mentioned expectations. One such

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<sup>40</sup> MSCI USA Catholic Values Index Methodology, (29.01.2024).

<sup>41</sup> John Paul II, *Laborem Exercens*, Vatican City 1981, 27, [https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf\\_jp-ii\\_enc\\_14091981\\_laborem-exercens.html](https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_14091981_laborem-exercens.html), (21.10.2021).

<sup>42</sup> Second Vatican Ecumenical Council, Pastoral Constitution on the Church in the Modern World *Gaudium et Spes*, 39: AAS 58, 1966, p. 1057.

<sup>43</sup> John Paul II, *Laborem Exercens*..., 27.

guide can be drawn from the ethics foundation for Christians which was set by Jesus in his teachings. The main message that Jesus left to the apostles and other disciples is that of **servant leadership**: “just as the Son of Man did not come to be served, but to serve, and to give His life for the ransom of many.”<sup>44</sup> The leader is not to be a kind of a king, who attracts attention and requires obedience from everyone. As P. Drucker says: “The goal is to make productive the specific strengths and knowledge of each individual.”<sup>45</sup> The leader is to be the one who works hard to seek out the talent of their employees and to strive to motivate the employees to develop their talents. This is so that everyone may fulfill their mission on the Earth that is God’s will regarding their lives. Apart from servant leadership, there are other abilities of inspiring and ethical managers. These are:

**Focus on contribution**<sup>46</sup> – Positive efforts are made to affect the performance of the institution in which one is employed. Jesus emphasizes the value of positive contribution among others in the parable of the Talents described in the Chapter 25 of Matthew’s gospel.<sup>47</sup> The parable is about a master and his three servants. Before going on a journey, the master entrusts his possessions to his servants. The first man was given five talents, the second two and the last servant one – all in accordance with the servants’ abilities. When the master returns, he asks his servants to show what they have done with the talents in order to settle the accounts. The first brings the five talents he was originally given, with another five that he has managed to multiply while trading. The second one also brings another two. The last one brings only the talent he was given and which buried in a hole out of fear for the master’s demands. Whereas the first two servants are praised by the master and are welcomed to his joy, the last one is criticized by the master and told to go into the darkness where there will be wailing and grinding of teeth, which signifies endless suffering. It is evident that God requires us to be fruitful, productive and to cooperate with his grace.

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<sup>44</sup> Matthew 20,28; New American Bible, 2002, [https://www.vatican.va/archive/ENG0839/\\_\\_\\_PVT.HTM](https://www.vatican.va/archive/ENG0839/___PVT.HTM), (21.10.2021); see also: E. Agosto, *Servant Leadership: Jesus and Paul*, Chalice Press, 2012.

<sup>45</sup> P.F. Drucker, *The Essential Drucker*, New York 2005, p. 81.

<sup>46</sup> P.F. Drucker, *The Essential Drucker...*, pp. 207–216.

<sup>47</sup> Matthew 25;14–30; New American Bible, [https://www.vatican.va/archive/ENG0839/\\_\\_\\_PVY.HTM](https://www.vatican.va/archive/ENG0839/___PVY.HTM), (21.10.2021).

**Charisma**<sup>48</sup> – A person is admired and followed by the whole team because of his or her integrity, courage and confidence in decision-taking. The inspiration for how to become a charismatic leader is surely the Parable of the Good Shepherd.<sup>49</sup> The Good Shepherd knows his sheep well and vice versa. The sheep know their shepherd well, so he does not need to say much. They recognize him simply by the sound of his voice. This depicts a really strong relationship. People usually become familiar with other people's voices when they really care about that other person. They need to be really committed to the relationship and eager to maintain it. If we do not care about someone, we do not want to remember that person's voice or anything else about the person. The Good Shepherd is in such a wholesome relationship with his sheep, that they follow him without hesitation. "I am the Good Shepherd; I know my sheep and my sheep know me."<sup>50</sup> The shepherd is ready to fight for his sheep with strangers who may try to hurt or steal the sheep, and thus destroy the flock. What seems to be very important here is that the Good Shepherd strives to unify the flock, just as leaders should do with the teams they lead.

**Passion (and determination)**<sup>51</sup> – This value should be present in all activities of a leader, that is in planning, organizing, motivating and controlling. In a nutshell, in all the main fields of management. Which of the Parables can become an inspiration thereof? Undoubtedly the Parable of the Lost Coin in Luke's Gospel.<sup>52</sup> On every leader's path there are many obstacles and difficulties. There are many people who create hurdles, but strong leaders are not deterred by them. "Or suppose a woman has ten silver coins and loses one. Doesn't she light a lamp, sweep the house and search carefully until she finds it?"<sup>53</sup> Searching for a light, which is wisdom, rightfulness, truth; sweeping the house, which invokes putting things in a proper order, checking how all the

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<sup>48</sup> P.G. Northouse, *Leadership: Theory and practice*, Sage publications 2021.

<sup>49</sup> John 10; 1–5, 11–18, New American Bible, [https://www.vatican.va/archive/ENG0839/\\_\\_\\_PXI.HTM](https://www.vatican.va/archive/ENG0839/___PXI.HTM), (21.10.2021).

<sup>50</sup> John 10,14, New American Bible, [https://www.vatican.va/archive/ENG0839/\\_\\_\\_PXI.HTM](https://www.vatican.va/archive/ENG0839/___PXI.HTM), (21.10.2021).

<sup>51</sup> S.R. Covey, *The 8th habit: From effectiveness to greatness*, Simon and Schuster 2013, p. 5 and further.

<sup>52</sup> Luke 15, 8, New American Bible, [https://www.vatican.va/archive/ENG0839/\\_\\_\\_PWY.HTM](https://www.vatican.va/archive/ENG0839/___PWY.HTM) (21.10.2021).

<sup>53</sup> Luke 15, 8.

business is performed, in order to reveal what is going wrong and proceeding with the job. That is how great leadership is undertaken. This leads to common rejoicing. The whole team is invited to rejoice when something is found, when the right direction is finally chosen.

The above few quotations of ethical, great managers are among many others and they are cited to provide inspiration from the New Testament. In spite of the fact that not all meaningful leaders consciously relate to the Catholic teaching, plenty of them publicly declare their deep faith and willingness to follow the example that Jesus set. One such example is certainly C. M. Christensen, a Harvard professor and business consultant as well as author of several books and dozens of articles. In the article “How will you measure your life?” he claims that at some point in his life, he realized that his lifetime aim was to improve the lives of everyone he meets.<sup>54</sup> P. Drucker also confirms, at the beginning of his main book on management that leaders can use the Bible as a checklist in order to become a great leader.<sup>55</sup>

#### 4. Conclusion

It is worth noting that responsibility, trust, social order, and other ethical values may positively influence economic, financial as well as managerial effectiveness, and positively affect social and business environment. Financial institutions are able to incorporate factors in their decisions, such as investor convictions and values, ecological conditions, as well as general environmental concerns. Moving beyond solutions associated with traditional investing, they can show that it is possible to exert long-term positive influence on the natural environment. Ethical funds existing on the market are a living proof of an effective combination of ethical and financial factors associated with investors' individual needs. They are also proof that Christian values and the social teaching of the Catholic Church are still fundamental to some participants in the financial markets. Ethical leaders, who are coherent and lead by their own example also seem to be

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<sup>54</sup> C. M. Christensen, *How Will You Measure Your Life?* (Harvard Business Review Classics), Harvard Business Review Press 2017, <https://hbr.org/2010/07/how-will-you-measure-your-life> (21.10.2021).

<sup>55</sup> P.F. Drucker, *The Essential Drucker*, quoted doc.



the ones who can really impact positively their businesses and environments in the long term.

Pope Francis argues for a shift to a new economic model that is at the service of human life and is “more attentive to ethical principles.”<sup>56</sup> It seems that our role now is to realize and show the world that the new economic model recently described by the Pope, but in fact proposed by Jesus 2000 years ago, is worth implementing. Moreover, further studies, articles and interdisciplinary projects of both faculty and business should aim at making a real global shift.

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<sup>56</sup> Francis, Pope, *Laudato si*, Vatican City 2015.

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## One Hundred Years of the Polish Theological Society

The Polish Theological Society is one of the oldest scientific societies operating in Poland. It was established by professors of the Faculty of Theology of the Jan Kazimierz University in Lviv on February 23, 1924. The patron of the Society is the saint and professor, Jan Kanty. The first president was Fr. Prof. Kazimierz Wais (1865–1934) who was a prominent representative of the Lviv University community. The first general secretary of the Society was Fr. Dr. Aleksy Klawek (1890–1969). After the organization had been approved by the Polish Episcopate, regional chapters of the society were established throughout the country, namely in Poznań, Tarnów and Przemyśl in 1924, Kielce in 1925, Lublin and Warsaw in 1926, Vilnius, Pelplin and Płock in 1927, Włocławek 1928, Kraków, Częstochowa, Kielce, Łuck and Sandomierz between 1931 and 1932, and Łódź and Pinsk after 1933.

The main aim of the Society was to revive the scientific movement that had died out during the partitions, to nurture the development of theological sciences in Poland, and to develop an interest in theological disciplines among the clergy. To achieve this aim, members of the Society gave cyclical lectures and published works, and a library also emerged. In addition, the professors of the theological faculties of the following universities established a strong cooperation: the Jan Kazimierz University in Lviv, the Jagiellonian University in Krakow, the Stefan Batory University in Vilnius, the University of Warsaw and the newly- established Catholic University of Lublin.

The scientific journal of the Polish Theological Society was the quarterly *Theology Review*; in 1931, it was renamed *Collectanea Theologica*. It published dissertations in English, French, German and Italian, and foreign-language summaries were added to the Polish articles. The editor-in-chief of the quarterly at that time was Fr. Teofil Długosz. An information bulletin, *Theology Movement*, was added to each issue of *Theology Review* and later *Collectanea Theologica*. *Theology Movement* contained information on the state of theology at that time, and by 1939, twenty volumes of the periodical had been published. The publication of the series, *Our Theological Thought*, also began; this was to contain materials from the congresses of the Polish Theological Society. Two volumes were published in Lviv in 1930 and in Warsaw in 1935. In 1935, the Society organized a scientific expedition to the Holy Land for fifty four of its members. From 1927 until the outbreak of World War II, the presidents of the Polish Theological Society were the professors Fr. Kazimierz Wais and Fr. Szczepan Szydelski. The office of general secretary was held by Fr. Alexis Klawek.

The Polish Theological Society played an important role, as it organized the nationwide scientific congresses of Polish theologians. The first of these congresses took place in Lviv on April 11 and 12, 1928, under the honorary patronage of the Metropolitan Archbishop of Lviv of the Latin rite Bolesław Twardowski. Andrzej Szeptycki, the Archbishop of Lviv of the Greek Catholic rite, and Józef Teodorowicz, of the Armenian rite, also participated in the congress, which also hosted around seventy priests from all over Poland. The inaugural lecture on *Augustinism and Thomism in Christian Thought* was delivered by Fr. Prof. Konstanty Michalski (1879–1947), who was Rector of the Jagiellonian University. Further sessions were held in five areas: philosophical, dogmatic, biblical, historical and liturgical. On the second day of the conference, an introductory lecture, entitled *The Task of Theology in Poland*, was delivered by Fr. Prof. Henryk Likowski (1876–1932), a historian from the University of Warsaw. The congress decided to publish a Polish Catholic encyclopedia covering all theological sciences, to conduct a wide exchange of books and teaching aids between universities, and to inform foreign theological centres about the works of Polish theologians.

In the interwar period, the main board of the Polish Theological Society organized another three such meetings of its members: April 11–12, 1928 in Lviv, August 18–20, 1933 in Warsaw and August 31–September 1, 1938 in Kraków (the latter jointly with the Association of Theological Institutes in Poland). The post-war congress of the Polish Theological Society coincided with the 550th anniversary of the Jagiellonian University's Faculty of Theology and the

25th -anniversary of the Polish Theological Society also played an important role. It took place in Krakow from 6 to 8 April, 1948. The Seventh Congress of Polish Theologians, which took place on September 12–15, 2004 in Lublin, was also strongly connected to these congresses. It was entitled: *The Church in Public Life. Polish and European Theology Towards New Challenges*.

During the terrible years of the war, 1939–1945, many members of the Polish Theological Society died. After the war, during the time of the Polish People's Republic (1945–1989), the Church suffered further persecution which also affected the Polish Theological Society. In 1946, the general secretary, Fr. Aleksy Klawek, and the president of the Krakow branch, Fr. Prof. Władysław Wicher (1888–1969), organized a nationwide convention of the Polish Theological Society in Lublin, during which a merger with the Association of Polish Theological Institutions took place. This is how the organization was established and it adopted the name of the Society of Polish Theologians named after St. Jan Kanty. The organization was based in Warsaw. Fr. Ignacy Grabowski, professor at the University of Warsaw, and his deputy, Fr. Alexy Klawek, were elected Chairmen of the Board. Despite many efforts, the Society of Polish Theologians was not approved by the state authorities, with only Krakow receiving recognition. On November 12, 1946, it was registered as the Polish Theological Society in Krakow and so began the Krakow period in the history of the Society.

In the second half of the 20th century, the presidents of the Polish Theological Society were professors: Władysław Wicher (1946–1956), Eugeniusz Florkowski (1956–1957), Kazimierz Klósak (1957–1958), Hieronim Wyczawski (1959–1960), Władysław Smereka (1960–1960 1962 and 1966–1973), Stanisław Grzybek (1962–1966), Bolesław Przybyszewski (1973–1978), Jerzy Chmiel (1978–1987), Kazimierz Hoła (1987–1988), Jan Wal (1988–1990, 1991–1996) and Tomasz Jelonek (1990–1991). Since 1996, Fr. Prof. Kazimierz Panuś has held this post. On February 28, 2023, he was re-elected president for a further three-year term (2023–2026).

The following people became well known for their active scientific activity in the Polish Theological Society at that time: Fr. Card. Karol Wojtyła, who in 1974 (in line with the pre-war tradition), was awarded the title of honorary member. Others who distinguished themselves were Fr. Ignacy Różycki, Andrzej Bober SJ, Kazimierz Drzymała SJ, Cyprian Jan Wichrowicz OP, Fr. Tadeusz Wojciechowski, Fr. Jan Kowalski and Fr. Bolesław Przybyszewski. A source of pride is the fact that the Polish Theological Society published two important books about the future Pope: *Person and Deed* (Kraków 1969) and *At the*

*Foundation of Renewal. A Study on the Implementation of Vatican II* (Kraków 1972). These teachings took place mainly at monthly meetings of members and at meetings of specialist sections, which were attended on equal terms by ordinary, supporting and honorary members of the Society.

Publishing activities have not been forgotten either. In 1949, the magazine *Collectanea Theologica* resumed publication. After the liquidation of the Faculty of Theology at the Jagiellonian University in 1954, the periodical was taken over by Warsaw. As a result, in Krakow in 1948, Fr. Aleksy Klawek founded the bimonthly *Biblical and Liturgical Movement* and ran it with great commitment until 1954. This journal, now published as a quarterly, is the official journal of the Polish Theological Society. It also publishes the President's annual reports on the Society's activities. Between 1969–1993, the Polish Theological Society also published the annual *Analecta Cracoviensia*, which in 1993, was transferred to the Pontifical Academy of Theology in Krakow.

After the socio-political changes in Poland in 1989, work started on changing the statute of the Polish Theological Society from the previous one of 1946, which had been imposed by the communist authorities and had significantly limited the activities of the Society. Finally, on April 7, 2004, the chairman of the Polish Bishops' Conference, Archbishop Józef Michalik, issued a decree stating that, in accordance with the applicable Code of Canon Law, the Polish Theological Society in Krakow was now a public association of the faithful, that is, a legal Church entity. The current statute of the Society, which was approved by the Polish Bishops' Conference on May 1, 2004, was adapted to this canonical situation. Furthermore, the Society was granted legal status in the Republic of Poland by the Minister of Internal Affairs and Administration. The new statute extends the activities of the Society throughout the country and recognizes secular persons as full members. Before this, they could only participate in the work of the Society as supporting members. The authorities of the Society are elected by the General Meeting for a period of three years. Currently, the Polish Theological Society uses the amended statute which was approved by the Polish Bishops' Conference on March 12, 2019 and, as of June 30, 2023, has 956 members. Within its framework, there are 16 specialist sections in Krakow and 17 branches throughout Poland: in Katowice, Przemyśl, Częstochowa, Kalwaria Zebrzydowska, Tarnów, Tuchów, Rzeszów, Kielce, Sandomierz, Bielsko-Biała, Radom, Sosnowiec, Szczecin, Toruń, Włocławek, Pelplin and Elbląg.

In carrying out its statutory objectives, the Polish Theological Society has conducted several research programs. The first of them was to proliferate the



knowledge of Polish saints and blessed. The program entitled “*Felix Saeculum Cracoviae*” – *Krakow’s Saints of the 15th Century*, showed that in the history of Poland, there was a time called *The Blessed Century (felix saeculum)*. This referred to Krakow and the six saintly men living at that time between 1390 and 1490. They were: Jan Kanty, Szymon from Lipnica, Stanisław from Kazimierz, Izajasz Boner, Michał Giedroyc and Świętosław the Silent. The continuation of this program was the presentation of the saints and blessed associated with Krakow at the turn of the 19th and 20th centuries. Brother Albert and Sister Bernardyna Jabłońska, mother Angela Truszkowska, Aniela Salawa and Sister Faustyna Kowalska were active in the town near Wawel at that time, and have since been beatified. The subsequent programs concerned the issues of the holiness of the laity, sacral art, forgiveness and reconciliation, and *Via Pulchritudinis* – biblical themes in Polish literature and culture. In recent years, research issues have focused on the topic: *Christians of Tomorrow. Hopes and fears*. This is closely related to the civilizational and cultural changes currently taking place in Europe, the war in Ukraine and the crisis in the Church. The fruits of these programs are presented in scientific conferences and publications published by the UNUM Publishing House of the Polish Theological Society. This itself is included in the list of publishing houses of the Ministry of Education and Science, as publishing reviewed scientific monographs both printed and online, through open access via the Institutional Repository of the Polish Theological Society. The UNUM Publishing House, run for many years by director Sebastian Wojnowski, publishes among others, *Sermons in Polish culture. Editions of Thematic Collections*, one of the most important series in the Polish humanities of the 21st century, financed by the National Program for the Development of Humanities. It is also worth emphasizing that the Polish Theological Society in Krakow was one of the main initiators of establishing the Committee of Theological Sciences at the Polish Academy of Sciences in December 2002.

As we can see, it is clear that the Polish Theological Society, the heir to the great traditions of several generations of scholars, undertakes new initiatives and tries to serve the Eternal Truth and pass this on to people today.



# Reviews

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*The Person and the Challenges*  
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## **Book review: Jan Ryś, *Cadet Corps No. 1 part I: Lobz period (1918–1939)*, Ignatianum, Kraków 2022, pp. 408**

In this publication, its author, Prof. Dr Hab. Jan Ryś – an excellent researcher of the history of Polish education during the period of Galician autonomy and the inter-war period, particularly in the area of the Kraków community – presented the issues of military education, which was represented by the Cadet Corps in the period of 1918–1939 in Łobzów. It should be noted that after regaining independence, the Polish authorities began the process of rebuilding military education with great enthusiasm, and one of the first schools was the Cadet School in Łobzów.

At the outset, it should be noted that, from a scientific point of view, the presented publication is the first study on the fate of cadet schools. It is based on a very wide source base, taking into account practically all possible types of historical sources and a rich source of literature on the subject. In terms of content, previous publications did not exhaust the issue under discussion. They raise the issue of the Cadet Corps, either fragmentarily in the context of other issues, or they do not use the source material and scientific apparatus.

In terms of structure, the study consists of six chapters of a problematic nature. Taking into account the research competence and scope of the author's interests, the publication is a pedagogical-historical monograph.

In the first chapter, the author highlights the issues of the establishment of the school, its organization, and the changes that occurred within it after the takeover by the Polish community. In the second chapter, the author characterizes the didactic process carried out. The third chapter contains information on the teaching and administrative staff, their qualifications and material situation. In the fourth chapter, the author characterizes the state of the educational process at the school. The fifth chapter contains research material on the fate of cadets. In the final sixth chapter, the author presents material on the material base of the school, the principles of financing, economy and also discusses the history of the school's main building.

In addition, the publication contains a substantial introduction, a conclusion, an extremely extensive bibliography for both source materials and literature directly related to its subject matter, lists of tables, charts and an index of photographs.

In conclusion, it should be emphasized that the publication in question attempts to reconstruct various aspects of the Cadet Corps from 1918 to 1939. In terms of content, the work does not raise any objections, and its thematic and chronological dimension makes it part of the ongoing research on the education of autonomous Galicia and the Second Republic in general.

All this demonstrates the author's high research integrity and good knowledge of the information base for the title research problem. Thanks to this, Prof. Jan Ryś created a valuable study of an interdisciplinary nature. Taking into account all the above qualities of the presented publication, it is necessary to express appreciation for its author. The book deserves formal recognition.

The publication should find its permanent place in every academic and school library and is of interest to researchers of this issue, students, history teachers and those interested in the subject.





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