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# The Person and the Challenges

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*The Person and the Challenges*
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# The Crisis of Truth, and Its Impact on Human Actions

## Abstract

Not only does Moral Theology tell us what we should do, but it also provides the reasons why we should do some things and avoid others. Over the centuries Christians paid attention to God's creatures because they realised that He speaks to us through them and reveals His will as well (Rom 1). This issue also became the object of metaphysical inquiry. The concept of the truth of all things explained how man gets knowledge about God's will through his creatures, which he subsequently should take into account in his moral conduct. The Enlightment proclaimed human freedom from religious beliefs and restrictions. Its philosophy, known as modern philosophy, tried to „conquer" metaphysics and the notion of the truth of all things. This paper presents these efforts and their consequences.

## Keywords

human moral conduct, metaphysics, the truth of all things, modern philosophy, ontology, Enlightment

## 1. Introduction

We might find ourselves subject to some confusion should we consider that there is nothing constant in man and his behaviors; that all his values and consequently his moral attitude depend on the culture any given person may belong to. If many people in any particular culture acknowledge as good a certain action which has been recognized as morally good for centuries, everything seems to be in order. However, when large numbers of citizens begin to acknowledge as morally good, or at least acceptable, something that in the past was acknowledged as morally wrong, some confusion arises. The main problem is who decides what is good and what is evil, and on what basis. Is it the prerogative of the citizens to make such a decision? If so, do they state it on their own or do they rely on some authority, religious or secular, e.g. the Church, the government or a supreme court? Western civilization has long recognized a set of moral rules known as God's commandments, and some people will also include the natural law as an authority for determining the legitimacy of actions. Moral solutions given by the latter are compatible with the Decalogue. Nevertheless, we are recently witnessing another moral attitude, known as ethical pluralism, i.e. that there may be many different moral solutions for the same situation (IVF, abortion, same sex union, transsexualism, etc.). Catholics are aware of this situation, and it requires some reliable comment or explanation.

A review of the history of Western culture confirms these observations. There was a time when nearly all moral convictions were unequivocal and compatible with the Bible and with the moral teaching of the Church. This does not mean that there were not sinners at that time. They were there, but they also were aware of their sins, i.e. when they sinned, they, and the society at large, knew they had done wrong. Today we also have sinners, but many of them do not admit to that fact, nor recognize that what they do is wrong. This is one of the reasons why the common awarness changed so dramatically; why so many people lost their moral compass; why instead of unequivocal moral judgement, ethical pluralism is invoked, i.e. the outlook that there are many different solutions to any given moral situation, and that they are all equally acceptable, even those solutions that contradict each other. Although we acknowledge that some changes in the moral evaluation of human actions may take place, it seems that some changes are so radical that they must have been the result of a shift that caused them. This paper intends to show how the evolution within Western philosophy contributed to the new moral environment.

## 2. Moral theology and its relationship to philosopohy

Moral theology is the branch of theology that deals with human moral behavior in light of God's revelation. However, moral theology does not refer exclusively to the Holy Bible and its complement known as Tradition. It also refers to any philosophy that helps to better understand moral requirements in a specific time and within a specific culture. This relationship in particular concerns the New Testament which, unlike the Old Testament, requires a person to make greater use of reason in moral conduct. As St. John Paul II expresses it in his encyclical letter *Fides et ratio*, „*Moral theology* has perhaps an even greater need of philosophy's contribution. In the New Testament, human life is much less governed by prescriptions than in the Old Testament. Life in the Spirit leads believers to a freedom and responsibility which surpass the Law. Yet the Gospel and the Apostolic writings still set forth both general principles of Christian conduct and specific teachings and precepts. In order to apply these to the particular circumstances of individual and communal life, Christians must be able fully to engage their conscience and the power of their reason. In other words, moral theology requires a sound philosophical vision of human nature and society, as well as of the general principles of ethical decision-making" (FR 68). Since there are many philosophical trends, we also need to be careful because we need „a sound philosophical vision of human nature and society" which is to help us to better understand moral obligations. That is why in moral theology we very often refer to St. Thomas Aquinas (1225–1274)[1] and his moral teaching.

There are at least two important features that make the philosophy of St. Thomas particularly suitable for resolving the ethical problems we confront. Among these are the objectivism of knowledge and its openness to transcendence. Objectivism consists of a specific attitude of a philosopher, which J. Pieper describes as follows: „Knowledge is the relation between the subject and the object, determined in its 'that' by the subject, in its 'what' by the object. (…) The content, the 'what', the nature of the knowledge, is determined solely by the matter, the thing, the object—insofar as we are dealing with true knowledge. If, then, any determination of the content by the will of the subject enters into the knowledge, if the subject wishes one thing to be so, something to be different, and something else not to be at all; then, as far as this personal

[1] Cf. John Paul II, Encyclical Letter *Fides et Ratio*, 83, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp_ii-enc_14091998_fides-et-ratio.html/ (20.03.2024).

subjective influence extends, there is actually no knowledge at all."[2] Openness to transcendence consists of the recognition of God's existence and His role in the world we live in. One of the most important traits of the reality that surrounds us and of which we are a part, is God's creation of all things.[3] There are many things produced by man. However, there are many things that do not come from him. He is not their author. These are thing like planets, including the Earth, climate, man himself, life, health, sexuality, and many others. Man finds them, but he does not create them. Since he wants to employ them to various purposes, he also wants to know them. The knowledge about them may be objective or not. The problem of the time and place that we live in is that many directives given to citizens by those who govern states and/or their confederations (such as the European Union) are not based on objective knowledge. This paper intends to demonstrate that the decisive shift in the history of philosophy, as well as those consequences that have influenced human life in the West (its moral dmiension in particular) has not resulted from objective knowledge about the world and mankind.

## 3. The role of philosophy and theology in human knowledge

There have been some basic convictions among the people living in Western civilization that seemed obvious for everybody who completed elementary education. Nowadays, we notice more and more often that these convictions disappear. People generally want to know the world they live in, their rights and duties concerning various communities they belong to, and rights and duties involving their own life. However, acquiring this kind of knowledge requires the expenditure of some effort. This is because most of the information we need is not obvious; it is hidden. Over the centuries certain methods of gaining suitable knowledge were established in the form of basic education, or, if somebody needed better knowledge, in the form of higher academic activities. During that time many great observations were made that have become the heritage of all

[2] J. Pieper, *Reality and the Good*, in: *Living the truth*, San Francisco 1989, wyd. Ignatius Press, p. 135.

[3] The notion of „things" used here refers to its Latin meaning which is a gift to us from the Romans—as J. Pieper names it. In the Latin, *res* is more than a material thing. It is rather *ens*: everything that is, everything that exists. Cf. J. Pieper, *The Truth of All Things*, in: *Living the truth*, San Francisco 1989, wyd. Ignatius Press, pp. 32–33.

humanity. For instance, Aristotle (384–322 BC) noticed that many things have complex structures. This means that if we want to get full knowledge of them, we need to employ different kinds of science.[4] E.g., if we want to get a perfect knowledge of the human being, biological sciences are not enough. We also need history, sociology, anthropology, philosophy, theology, and several others. The great problem of our time is that some representatives of empirical sciences, infatuated with their own achievements, overlook Aristotle's basic observation. They often deny the scientific usefulness of any kind of science other than their own.[5] The „victims" of this approach are first and foremost Christian theology and certain trends of philosophy, specifically the philosophy that refers to classic metaphysics, to the philosophical position of Aristotle and St. Thomas Aquinas, which in this respect is compatible with Christian theology. Supporters of the peculiar apotheosis of empirical sciences say that theology and philosophy are not science at all, because they do not follow the scientific methods that are identified exclusively with those of empirical sciences. According to these people, the lack of any possibility for empirical verification of the results of theological and/or philosophical inquiries makes both these sciences useless. However, empirical methodology is not the only valid method of scientific investigation. There are different types of content people learn, e.g. values, meanings, aims, truth, etc., that are not explored by the empirical sciences. The latter answer rather the question as to *how* some things are built and *how* they work, but not what their relative values are among other things (i.e. which thing could be sacrificed for another in a morally correct way), what their meaning is for man, what their aims and especially what their truth is. The empirical sciences are blind to these issues which also can be investigated in a scientific way. That is why people who want to know the answers to questions concerning the value, meaning, goals, and truth of various things man copes with, need to refer to philosophy and theology.

[4] Cf. A. Maryniarczyk, *Odkrycie wewnętrznej struktury bytów* (The discovery of the inner structure of beings), Lublin 2006, wyd. Polskie Towarzystwo Tomasza z Akwinu, p. 23.

[5] It is particularly well seen in scientism. Cf. M. Stenmark, *What is scientism?*, "Religious Studies" (1997), vol. 33, no. 1, pp. 15–32.

## 4. The concept of truth in philosophy

The main issue of philosophy is the truth of things. It concerns their value, meaning, and goals. That is why it is also the main issue I want to address. However, before I do so, I need to recall some basic information about philosophy as a cognitive activity.

Philosophy, as we noted above, is the part of science that searches for the fundamental principles upon which reality is based and according to which it functions. Philosophical research requires some peculiar skills that make it a sophisticated and, to a certain extent, an exclusive human activity. These particular conditions contribute to the special place and recognition philosophy has taken over the centuries. These conditions have helped what philosophy has said about the world and man to be accepted. However, an incorrect understanding of these basic principles has contributed to the creation of incorrect worldviews and ideologies. „Incorrect" here means first and foremost any understanding that does not mirror reality; that is not based on things in all their dimensions, e.g. not reduced to their phenomenal plane as dealt with by empirical sciences. There are some authors who expose social problems created by erroneous descriptions of the phenomenal dimension of reality.[6] Nevertheless, something similar or even more significant and dangerous may result from the improper philosophical description of reality. One of such cases is presented by J. Pieper in his essay *The Truth of All Things*. He writes about the truth of all things and about what happened to that truth within modern philosophy.

We need to remember that the classic philosophy, which in the last mainstream period was known as the 'scholastic', distinguished between two kinds of truth: the truth of cognition and the truth of things.[7] Both referred to the same classic definition of truth: *veritas est adaequatio rei et intellectus*. We refer to the truth of cognition when our mind (*intellectus*) adjusts to the thing we want to know. When compliance between our mind and the thing occurs, we say that our knowledge is true. When we think about the truth of things, it is not the human intellect that adjusts to the thing, but the thing that adjusts

[6] The essay *Degenerate Moderns. Modernity as Rationalized Sexual Misbehavior* by E. Michael Jones. San Francisco 1993, wyd. Ignatius Press, provides many examples of such descriptions.

[7] The term „classic philosophy" is the same as used by M.A. Krąpiec. Cf. M.A. Krąpiec, *Czym jest filozofia klasyczna?* (What is classic philosophy?), „Roczniki filozoficzne" 45: 1997, n. 1, pp. 156–165.

to the mind. Let us imagine the painter who paints a picture. During his work he constantly adjusts the figures and colors on his picture to fit some idea he has in his mind. Thus, conversely to what we have in the case of the truth of cognition, this is not the human mind that adjusts to the thing, but it is the thing that is adjusted to the human mind. Finally, the painter accepts what he did, i.e. that what he painted mirrors his ideas concerning the picture; that there is full compatibility between his mind and the thing. In this case, in regard to the nature of truth, we also say that: the picture is true, because it mirrors the painter's intellect. There is *adaequatio rei et intellectus*. Here, we have also distinguished truth.

Subsequently, the picture is exposed to the public in one of the famous galleries. We may be surprised at what the public wants to know when it observes the picture. People may admire the external forms of the work: its physical dimensions, even its weight and the chemical components of the colors, i.e. all the elements of the picture that are ususally the object of empirical science. However, it seems that what is most important for the visitors is not these elements, but rather the artistry of the picture. This artistry refers to the idea the painter had in his mind when he created his picture. We also know, that the people may learn about that artistry because the picture is true, i.e. it mirrors the ideas of the artist's mind. Because of this truth, i.e. the truth of this thing, we need here to repeat it, and emphasize that we are able to know the ideas the painter had with regard to his picture.

Now, we need to think about things we meet in our life. Some of them, like all artefacts, come from people as their works: cutlery, table settings, various electronic devices, vehicles for transportation, armory, and others. We may know how to use them, because they mirror the ideas of their constructors. If we have some difficulties in using them properly, we can read user's manuals in which these ideas are explained. The same pattern applies to God's creatures, because they also mirror His mind, and we can recognize the ideas He had with regard to His creatures, i.e. to such things as man, human life, human sexuality, marriage, etc. If we encounter difficulties in this recognition, we have a unique „user's manual" which is the Holy Bible, along with the assistance we have from a "help desk", that is, some people whom God called to help others to know His mind. Thus, knowledge about God's plans for creation is possible thanks to the truth of things. If anybody wants to act rationally (i.e. in a way proper to the human being), he or she needs first to have some knowledge about the things we deal with. This knowledge should be as full as possible, which means it should not

be reduced to what emprical science says about the things in question. If possible, we also need to know the meaning of the thing, its value among other things, and its right purpose as determined by God. All this means that rational human conduct requires serious consideration of the truth of all things.

Unfortunately, we also know that this kind of knowledge about things may prohibit a person from some actions, and because of that it may be troublesome knowledge. The knowledge about marriage as an exclusive, faithful, and indissoluble union of a man and a woman may prohibit a spouse from committing adultery. Accurate knowledge about human life and the meaning given to it by God may be a real obstacle to any attempt against human life, such as abortion or euthanasia. The truth of things created by God disturbs some people in their plans. That is why it seems to them that it would be better if such truth disappeared from philosophy and from the public discourse. Modern philosophy played a major role in achieving this goal.

## 5. Modern philosophy and the truth of all things

In the already-mentioned essay by J. Pieper (1904–1997) *The Truth of All Things*[8], the German philosopher traced the way the modern philosophers achieved their goal, which was the rejection of the concept of the truth of things from the mainstream of philosophical discourse. Pieper begins his essay with a description of the climate in which modern philosophy developed. Its representatives were opponents of scholasticism (the predominant philosophical mainstream trend prior to the advent of modern philosophy). Modern philosophers despised the achievements and theorems of scholastic philosophy. The main victim of this attitude was classic metaphysics together with the truth of all things.

Generally, any new philosophical trend tries somehow to contrast itself with the intellectual weaknesses or incorrect and untrue views of the previous one. This is very much the situation of modern philosophy, which took its place in mainstream philosophy after scholasticism. The modern philosophers were convinced that their philosophy was much better than scholasticism. Among other things, this self-esteem was based on the achievements of empirical science, which had succeeded in negating a variety of scientific convictions from the time of scholasticism. Scholasticism seemed to undermine modern philosophy's

[8] See footnotes 2 and 3.

scientific methodology. However, not everything that was recognizable as acceptable within empirical science was equally acceptable within philosophy, especially as far as issues of metaphysics might be concerned. In Pieper's essay, he presents the reasoning behind the basis on which modern philosophers arrived at the total negation of the truth of all things. But in a break with the usual practice, they imposed this negation despite lacking the customary arguments asserting the shortcomings of the previously accepted standard.

The truth of things, as we already know, is that which fulfills the requirement of the truth; that is, the agreement (*adaequatio*) between the intellect and a thing that embodies the ideas present in the intellect of its creator. In the case of God's intellect, all his creatures are true, because they embody the ideas that God intended for them. What is more, the human intellect, as created by God, is able to get to know those divine ideas. Also, things are created in such a way that they are open to the knowing mind. Thus, we have here two important relationships: the first between the divine intellect and a thing, and the second between that thing and the human intellect. In this way, things contain within themselves a kind of a mean to find out about them and about their Creator.[9]

The first major inroads into the description of the truth of all things come from St. Augustine (354–430) who said that a thing is true when it conforms to its idea, i.e. to the idea of that thing. This statement introduces the idea of that thing's existence separately from the idea of that thing in God's intellect. We can abstract that idea from a thing, but it does not mean that in God's creatures that idea exists on its own, i.e. that it has its own existence independent from what God intended for it to have. St. Albert the Great (died 1280), who was St. Thomas Aquinas' master, presented a point of view similar to that of St. Augustine. He maintained that a thing is true if it conforms to its proper essential form.[10] However, in both cases Pieper underlines that neither of those thinkers understood that conformity as being the thing's independence from God and His creative mind.

Modern philosophy renewed the view of the thing's identity as conforming to that thing's idea. However, it presented its view in such a way as though the ideas had had their own existence independent from the Creator and His mind. Thus, things were viewed as being dependent on their ideas,

[9] This observation is confirmed by the Apostle St. Paul in his *Letter to the Romans* (1:20).

[10] J. Pieper sees here the influence of Avicenna. Cf. *The Truth of All Things*, in: *Living the truth*, San Francisco 1989, wyd. Ignatius Press, p. 68.

but the ideas themselves gradually became independent from the Creator. In the XVII and XVIII centuries some philosophers followed the teaching of St. Thomas Aquinas concerning the truth of all things understood as conformity between those things and the mind of their Creator, while others interpreted it as confromity between the thing and its idea as identified with the thing's essence. Although initially no modern philosopher purported the independence of the ideas of things from God (they followed what was said by Augustine and Albert the Great) this understanding became more and more common.

One of the representatives of this view was Rudolf Goclenius (1547–1628) who maintained that the truth of things is the confromity of all things with God's intellect and with their own essence. Christian Wolff (1679–1754) omitted the first part of this statement but preserved the second one. Immanuel Kant (1724–1804) found a new solution for the truth of all things: he stated that the concept of this truth is „fertile and tautologic" and removed it from the philosophical discourse. This position was accepted by mainstream modern philosophy which resulted not only in the renunciation of the concept of the truth of all things, but also of classic metaphysics in its entirety.

Since we already know that any new trend in mainstream philiosophy is usually built on perceived mistakes or incorrect views of its predecessors, we want to observe how this rule works in the case of modern philosophy and the truth of all things. Pieper's essay suggests that the antimetaphysical position of modern philosophy was not based exclusively on a misunderstanding of the truth of all things. The main reason for that position did not come from philosophy. Pieper says that there was then a strong desire to abandon the existing dependence on some old views of man and the world. Richard Kroner (1884–1974), another German philosopher, indicates a strong will for the „conquest of the metaphysics of being, the transfer of the center of gravity from the object to the subject."[11] Thus, things (beings) should have lost their role as means in our dialogue with God. They were thereafter divested of their function of communicating His will to us. Now it was man who decided everything without being subject to influence from any outside authority. From that point on, things could no longer tell us anything about themselves, at least nothing meaningful that should influence our moral decisions and

[11] Cf. J. Pieper, *Reality and the Good*, in: *Living the truth*, San Francisco 1989, wyd. Ignatius Press, p. 142.

their implementation. It was thereafter we, and only we, who should decide about our moral choices. It might be said that there is some logical connection between this affirmation and other crucial statements in Kant's philosophy, namely that practical reason (employed by man in his actions) and theoretical reason (employed for knowing reality) are independent, and that it is not possible to get to know a thing in itself.

## 6. Classic metaphysics and ontology

As it was said above, any new stage in the development of philosophy is based on its opposition to its predecessors. However, this opposition should be founded on scientific arguments which prove incorrectness or mistakes in the earlier views of the world. The problem with modern philosophy is that it failed to identify falsehoods in either classic metaphysics or the concept of the truth of all things. Classic metaphysics was nevertheless deleted from the mainstream of philosophical discourse. The main problem is that this redirection was not based on rational premises proper to changes in philosophy or science. It was rather a voluntaristic shift; philosophers took this new course, but neither in the way proper to science nor to philosophy (if we recognize the latter as seprate kind of science). Thus, they determined a new way in which we should see man and the world.[12] In taking this new direction, the concept of reality which was the object of classic metaphysics was removed from the human experience as though it had never existed. This decision is nonetheless compatible with the well known Enlightment adage *sapere aude*! which means *dare to be wise*. „To be wise" came to mean that philosophers should take the lot of humanity in their own hands, to follow human reason, and to leave previous human beliefs and views of the world behind. In this case, previous human beliefs and views means beliefs and views based in religion. This decision was a kind of encouragement to mankind: emancipate yourself from your religious beliefs and religious restrictions. Empirical sciences will

[12] This does not mean to indicate that the only reason for such a change was what happened within philosophy itself. There were other factors that also contributed to this process, e.g. religious movements and the Reformation. They are described in: B. S. Gregory, *The Unintended Reformation. How a Religious Revolution Secularized Society*, Cambridge, Massachussets, 2012, wyd. The Belknap Press of Harvard University Press.

provide you ever-growing knowledge of all fields of human activities as well as the possibilities for controlling them.[13]

Many people have been convinced that the Christian worldview was attacked and restricted in Western culture on the basis of proper philosophical and rational reasoning, i.e. that human reason required that shift. The history of philosophy, however, shows that this change did not result from rational inference. It was rather a further step in the realization of a new conviction that Western culture adopted during the Renaissance, that man himself should be the measure of all things.[14] Modern philosophy seemed to confirm this conviction. Modern man became sure that in his world there was no room for both himself and God. It was to be man alone who was to become the only lord, and thus the only measure of all things. Thus, hostility against Christianity does not have any scientific foundation. It is the result of anger against God that enemies of the Church tried to justify by referring to wickedness perpetrated by certain people within the Church. This kind of justification nevertheless seems far from suffcient. It was rather an excuse to make a cultural change in which the most important role was to be played by the „enlightened" people appealing to the possibilities of human reason. Religion and theology were obstacles to the implementation of these intentions. „'Anti-theological ire' is not accidental to what modern philosophy is, it is its essence. To assure that the possibility of the truth of revelation is excluded from reason, reason must be self-constituted. Reason can be self-constituted and close off the possibility

[13] „Beginning gradually in newly successful ways in the seventeenth century, science became the means by which to realize this ambition for control in the service of human desires, from Enlightenment *philosophes* through nineteenth century progressive liberals to present day eugenicist transhumanists. The greater the scientific understanding of nature, the greater is science's power, and the greater are the ambitions to which human beings can aspire—and the fewer the limits, provided God is not in the picture." B. S. Gregory, *The Unintended Reformation. How a Religious Revolution Secularized Society*, Cambridge, Massachussets, 2012, wyd. The Belknap Press of Harvard University Press, p. 58.

[14] In the XIX century this idea was clearly expressed by R.W. Emerson (1804–1882): „Not God but the self-reliant, self-assertive individual was 'the centre of things. Where he is, there is nature. He measures you, and all men, and all events.' Indeed, 'every new mind is a new classification', and if 'of uncommon activity and power… it imposes its classification on other men.' (…) Prophetic words, those." These are Emerson's words as quoted by: B. S. Gregory, *The Unintended Reformation. How a Religious Revolution Secularized Society*, Cambridge, Massachussets, 2012, wyd. The Belknap Press of Harvard University Press, p. 121.

of revelation by constituting itself as a rule. And it constitutes itself as a rule by denying the immanent teleology of the mind towards truth."[15]

In this context, the rejection of the truth of all things and of classic metaphysics in its entirety is not the result of progress in science (proper human reasoning that rejects whatever is untrue), but as a necessary step to give man the opportunity to take over God's place. In this view then, it is man and only man who decides what the meaning and the purposefulness of particular things are; what is good and what is evil; what should be done and what should be avoided; and who should be promoted for acceptance of, and who should be punished for oppostion to this new order. What may cause us anxiety is that this description mirrors contemporary mainstream Western culture, at least that culture that manifests itself in the majority of the social media and political agendas.

It may be said that the changes we are currently witnessing are not as radical as in this description. Even if metaphysics seems to be „conquered" we should not worry. Meanwhile, the reason for anxiety is not that there are changes in philosophy. The reason to worry is that these changes consist of an intentional rejection of truth in our culture in order to establish a new world without truth. Metaphysics has its own object and this object does not disappear when people „conquer" metaphysics. Metaphysics searches for the most basic properties of things: their essence, nature, value, and meaning. Thus, if we remove metaphysics, along with its contents, some fundamental questions concerning man and the world remain unanswered. Since life abhors a vacuum, modern philosophy prepared a substitute for classic metaphysics: this is the ontology that appeared in the XVII century.

Some people think that metaphysics and ontology are the same. However, there is a fundamental difference between them. Metaphysics is concerned with what already exists, with what is real; while ontology is concerned with the conditions previous to the thing's existence. Ontology intends to establish the conditions for the existence of various things. Thus, the beginning of metaphysical reasoning is empirical, and moves towards some content that is hidden at first sight—the basic rules for what we can come to know. Ontology meanwhile does not start with *empiria*. It starts with some *human* reflection *a priori* in order

[15] F. Slade, *Was Ist Aufklärung? Notes on Maritain, Rorty, and Bloom, With Thanks But Not Apologies to Immanuel Kant*, in: *The Common Things: Essays on Thomism and Education*, D. McInerny (ed.), Washington, DC 1999, wyd. American Maritain Association, p. 64.

to establish the basic rules for the existence of things. It is very important to notice that these rules or proprieties are invented by the human intellect, which is finite and prone to errors. If it is to establish the basic rules, these rules might also be wrong. Thus, in the place of rules imposed on things by God, i.e. the rules that already exist and that we can know, some people desire to impose their own rules, rules that they invented themselves for things they encounter.[16]

Are the advocates of the changes in question completely wrong? Could their intentions and inventions be completely arbitrary? In order to answer both these questions we need once more to realize that it is not man who creates the majority of the things we encounter, nor is it he who creates basic rules for their existence and functioning. His thoughts and intentions do not have power similar to that of God. In the Bible we find that God speaks His word and things come into being according to that word (Gen 1–2). Man, despite all his efforts, can do neither the same nor anything like it. V. Possenti writes: „It is a need for some unusual phantasy and a significant level of contempt of being and life to claim that the thought of an individual—or the thought of the hypothetical transcendental 'I'—can create the thing when it thinks about it, subordinating it to the logical constructions of the pure apriorical thought which while creating its mental object as it wishes (…), it expects that the thing subordinates to it: What hubris and illusion! What incredible reversion of the direction of knowledge! This is not the existing thing which must subordinate to logical and apriorical mental object but contrary to that."[17]

If the human efforts to establish basic rules for things are based on knowledge of the thing—of what is real—we could accept such an approach, since these efforts resemble what metaphysics does. If instead, some people follow the assumption that we cannot get knowledge about things (their essence, value, meaning, and basic rules of their functioning), and we need to reinvent these things according to our purposes which have nothing to do with reality, then

[16] The way ontology works is described by A. Maryniarczyk. Cf. *Metafizyka a ontologie. Próby przezwyciężenia metafizyki i ich paradoksy* (Metaphysics and ontologies. Attempts to overcome metaphysics and their paradoxes), Lublin 2015, wyd. Polskie Towarzystwo Tomasza z Akwinu. It may happen that the rules invented by some ontology may be logically correct but unreal. The real existence of those rules is not their most important feature.

[17] V. Possenti, *Powrót do bytu. Pożegnanie z metafizyką nowożytną* (*Back to being. Farewell to modern metaphysics*—quotation in the text is my translation from Polish), Lublin 2020, wyd. Polskie Towarzystwo Tomasza z Akwinu, p. 41.

various kinds of problems, including moral problems, begin. In contemporary life in the West we have many such examples, for instance in bioethics.[18]

## 7. Conclusion: A great danger to our civilization, and hope against all odds

When we seriously consider the changes that have taken place in philosophy, we should not sleep peacefully. This is because some people want to change our world and the rules of its functioning. While such people (it is a great paradox) encourage others to practice ecological life, i.e. life according to environmental rules, they intimidate and disturb them from living according to the most basic „ecological" rules, which are the ideas that God has for His creation (the world foremost among them). Since God speaks to us not only directly, but also through things He created, we are able to know His rules.

Humanity knows many Promethean ideas which seemed to change our world for the better. The word 'Promethean' here means intentions against God's will. As far as we know them from history, their results were usually deplorable, resulting in human suferring and death. We know, especially here in Poland, what Marxism and communism are. There were also other antichristian ideologies which brought disastrous consequences: fascism, eugenics, and various nationalisms. All of them proved their irrationality. What might create anxiety is the fact that, surprisingly, some of them are currently experiencing a renaissance in the West. If we can say anything about human misfortune, it is difficult to imagine a more inhumane treatment than being forced (e.g by politicians in power) to live in an irrational way. And such a fate seems to be the most likely prospect for today's generation, if politicians do not abandon their dream of replacing the truth with their irresponsible projects of a new world "created" against God's will. Our only hope is to cling to God, who desires human good. We are conscious of God's plans for us both from His revelation and as a result of our intellectual efforts within metaphysics with its basic issue which is the truth of all things.

[18] E.g instead of recognizing the human embryo or fetus as an innocent human being as is the case, numerous „ontologists" in parliaments and hospitals try to establish that the embryo and/or fetus is not a human being, or at least that, although it is a living being it is not worthy of human rights.

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# Efflorescence of Relationships in Christ – Theological Fundament and Resonating Prospect

## Abstract

The aim of the paper is to examine the potency contained in the mystery of Christ as Alpha and Omega of human history. The issue will be viewed through the prism of *accidental encounters*, etc. that is, those which in our earthly life have no visible importance or continuation. It is striking that our life largely consists of such contacts: thousands of people passing by every day seem to be accidental, "non-productive" and not important. *Broken relationships* belong to the same set as well. Thus, the real question is whether they have any deeper meaning or not. I will try to argue, by reference to spiritual theology, that life in Christ brings a real answer to this question. The apparently accidental encounters become, subsequently, *relationships flourishing* in Christ, on the basis that He is the one spiritual principle of all believers and the Head of the Mystical Body of the Church. In Him, our particular present encounters are purified and come into perfection to the state when they will appear as true and everlasting relationships. A man who is overlooked now turns out to be a real co-author of my eternal happiness. Although this sense will fully be realised in heaven, it can now be experienced by hope and the contemplation of the neighbour in God.

## Keywords

Christ, man, encounter, relationship, principle, mutual penetration in love, Mystical Body of Christ, contemplation

## 1. Introduction—Problem of Accidental Encounters and Broken Relationships

The starting point of this consideration may be a daily observation of interpersonal encounters. It is a striking phenomenon that a vast majority of them are contacts with no continuation. It regularly happens that people pass by one another on the streets, at marketplaces, in shops. Sometimes such contacts leave behind some ephemeral impression, but do not result in something permanent. It is worth noting that they are non-productive for an economic prospect. We waste much time on small facts which are not capitalised and do not support our business, despite claiming a butterfly effect. Here, they are proposed to be named *encounters* as not turning into *relationships*.

Making every contact a true relationship seems to be impossible, allowing for a scale of daily encounters, amounts of residents and population density. A man, even if he is fully aware of the worth of interpersonal life, remains a contingent being. In his present condition, he is unable to treat each encounter as a relationship. Only a limited number of persons could be entered into his horizon of closest bonds. Thus, the term *encounter* is supplemented by the adjective *accidental.* The truth that immensity of facts is accidental or beyond the mainstream of life points out that a man cannot embrace and permeate the whole reality he lives in.

In some respect, accidental encounters have something in common with *broken relationships*. It concerns those bonds which, having taken a form of an authentic relationship, were, for some reason, terminated. Numerous cases of acquaintanceship or even friendship could serve as examples. On the one hand, they really influenced a person, while encounters did not; but on the other hand, they all have no actual continuity. Generally speaking, true relationships are distinguished by the traits of permanency and actual interpersonal "content".

The weakness in accidental encounters and broken relationships is deepened by a post-modern tendency to atomise a man from the society and to build up an individualistic sphere of comfort and career.[1] The post-modern (or even post post-modern) time is characterised by a crisis of deep relationships which

[1] Z. Sareło, *Postmodernistyczny styl myślenia i życia*, in: Z. Sareło (ed.), *Postmodernizm—wyzwanie dla chrześcijaństwa*, Poznań 1955, wyd. Pallotinum, pp. 9–27; P. Góralczyk, *Życie na próbę*, in: Z. Sareło (ed.), *Postmodernizm—wyzwanie dla chrześcijaństwa*, Poznań 1995, wyd. Pallotinum, pp. 52–59; A. Vasiliauskaite (sr. Gabriele OSB), S. Blinstrubis,

imply full personal involvement. A significant criterion for such a relationship, namely potency to friendship or to sacrifice life for the sake of the other, is often deteriorated. Focused upon himself, a man does not recognise and trust the relational truth of his life. His environment consists of fluxional bonds with partners at work and home. It is reflected in speech when the words "wife" or "husband" are replaced by the word "partner". Relativization of truth and concepts undermines the meaning of love, though the man did not cease looking for some kind of experiencing love, but on his own condition. Here, the role of sin, which destroys unity amongst people, should be mentioned.[2]

The question is whether or not accidental encounters or similar cases (for example, broken relationships) develop and could elicit some further meaning. Although not undertaken too often, the question seems to be substantial for understanding the full meaning of social life. The response will be expressed in terms of spiritual theology by reference to the Bible, the Magisterium of the Church and to meaningful authors from the Doctors of the Church to Thomas Merton. The presentation will be followed by the comparison with some context of contemporary humanistic science (Rosa's theory of resonance) in order to indicate a field of possible inspirations and collaboration. The conviction that this attempt could contribute to the personalistic thought should be raised.

The responsive explanation culminates in the proposed term *efflorescence of relationships* (and such like) which represents the rich Church tradition in its pursuit of dialogue with contemporary men. It is some fruit of the international conference *Religion and Flourishing Man*[3], undertaking questions of man's religious development in the face of contemporary advancement. The term efflorescence seems to be a convenient proposal also for its meaning of continuity and dynamic progress which juxtaposes accidentality and limitations of temporal interpersonal experience.

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*The Anthropological Crisis of the XXI Century: The Expression and the Church's Response to Its Forms in Catholic Schools*, "The Person and the Challenges" 12 (2022) 2, pp. 73–79.

[2] Benedict XVI, *Encyclical Letter Spe Salvi*, 14, https://www.vatican.va/content/benedict-xvi/en/encyclicals/documents/hf_ben-xvi_enc_20071130_spe-salvi.html (01.05.2023).

[3] International Scientific Conference *Religion and Flourishing Man*, Krakow 10.05.2023, The Pontifical University of John Paul II in Krakow, https://upjp2.edu.pl/konferencje-i-wydarzenia/international-scientific-conference-religion-and-flourishing-man-145.html (22.05.2023).

## 2. The Answer—The Body of Christ in its Eschatological Efflorescence

The answer is suggested by spiritual theology which reflects the teaching of the Catholic Church. The proper locus is the reality of the Church as the Mystical Body of Christ, which represents a new quality of interconnections of her members. St. Paul gives an allegorical explanation: "For in one Spirit we were all baptized into one body" (1 Cor 12,13)[4], and reminds that the diversity of members has been intended by Christ for making one body. The figurative dialogue between the members shows their awareness of being newly-connected to one another through Christ. When the eye cannot say to the hand, "I do not need you" (1 Cor 12:21), it means that the eye recognises the hand as something different, but simultaneously attached. However, the inter-connection exists on the grounds of the body, otherwise they find no reason to be referred to each other and then saying, "I do not need you", is possible. Thus, a Christian recognises the neighbour for the sake of Christ, so that the whole perception of the member is rooted in the Head of the Body.

This kind of connection has been strikingly exposed by St. Augustine's notion of loving a man for the sake of God. He says: "no one ought to love even himself for his own sake, but for the sake of Him who is the true object of enjoyment". By the same token, the other is loved too: "no other man has a right to be angry if you love him too for God's sake."[5] The Church confirms, "we love God above all things for his own sake, and our neighbour as ourselves for the love of God."[6] Then, loving reception of the other is to be actualised not beyond Christ, but through Him. It constitutes the basis for the communication of the saints as it is stated by the Church: "Since all the faithful form one body, the good of each is communicated to the others."[7] It means too that according to God's intention, each member of the Church-body gives itself

[4] All Biblical quotations and references according to *New American Bible Revised Edition* (NABRE), https://www.biblegateway.com/passage/?search=1%20Corinthians%2012&version=NABRE (18.05.2023).

[5] Saint Augustine, *On Christian Doctrine*, 1.21, https://www.newadvent.org/fathers/12021.htm (16.04.2023).

[6] *Catechism of the Catholic Church*, 1822, https://www.vatican.va/archive/ENG0015/__P66.HTM (16.04.2023).

[7] *Catechism of the Catholic Church*, 947, https://www.vatican.va/archive/ENG0015/__P66.HTM (16.04.2023).

to all others and receives their self-giving. In this state, accidental encounters as well as broken bonds are replaced by true relationships—the one possible case of full interpersonal *givenness*. Just as it is impossible to build a body out of accidental elements, not performing the bodily functions, it is the same with the Church, who cannot as such be composed of members remaining in loose dependency. The heavenly life is the inexhaustible and ever-flowing well-spring of mutual communion.[8]

In his personal life, Thomas Merton betokens this truth. One day in 1958 at the corner of Fourth and Walnut streets in Louisville, he immediately realised that the people were his and he was theirs and even if all people are complete strangers, there is no reason for strangeness among them anymore.[9] He perceives them in the depth of personal identity, far beyond sin, desire or self-knowledge,[10] that is in the heart, as it is taught by the Church.[11] He sees them in the core of their real being that means as they are, as persons, in the eyes of God.[12] Such a kind of perception evokes the patristic idea of *theoria physike*, which signifies reaching to the real essence of each being (*logos*) as good participating in the mystery of the Incarnation. It enables a man to see and to love Christ both in himself and others.[13] This specific perception, being motivated by supernatural empowering, promises some potency of faith and love which will be perfected in a future life.

Rooted in above experience, Merton's apprehension of interpersonal bonds[14] shows the perspective of a new status of men in Christ's love. He pictures the vision of penetration in love:

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[8] *Catechism of the Catholic Church*, 1045, https://www.vatican.va/archive/ENG0015/__P66.HTM (16.04.2023).

[9] T. Merton, *Zapiski współwinnego widza*, trans. Z. Ławrynowicz et al. Poznań 1994, wyd. Dom Wydawniczy REBIS, pp. 222–223.

[10] J. Forest, *Tomasza Mertona życie z mądrością. Biografia,* trans. J. Margański, Bydgoszcz 1997, wyd. Wydawnictwo Homini, p. 164.

[11] *Catechism of the Catholic Church*, 2563, https://www.vatican.va/archive/ENG0015/__P66.HTM (16.04.2023).

[12] T. Merton, *Zapiski współwinnego widza*, trans. Z. Ławrynowicz et al. Poznań 1994, wyd. Dom Wydawniczy REBIS, pp. 224–225.

[13] T. Merton, *Mistyka chrześcijańska. Trzynaście spotkań ze słynnym trapistą*, trans. G. Gomola et al., Poznań 2019, wyd. Wydawnictwo W drodze, pp. 116–117.

[14] J. Forest, *Tomasza Mertona życie z mądrością. Biografia,* trans. J. Margański. Bydgoszcz 1997, wyd. Wydawnictwo Homini, p. 165.

"My true personality will be fulfilled in the Mystical Christ in this one way above all, that through me, Christ and His Spirit will be able to love you and all men and God the Father in a way that would be possible in no one else.

Love comes out of God and gathers us to God in order to pour itself back into God through all of us and bring us all back to Him on the tide of His own infinite mercy."[15]

The first crucial observation is that a human person finds his or her fulfilment just in the Mystical Body of Christ (the Church). Furthermore, its *bodily* unity consists in the fact that each individual is like a unique channel through which God's love flows. This status is reflected by the motif of pouring love through men. Here, the individuality of a person has been stressed, since one man cannot be replaced by another. Every individual is intended to participate in this stream of love pouring through all people. It means that God's way of love, the love of the Three Divine Persons, underlies this kind of multi-channelled permeation. However, this love operates not only with separated individuals, but gathers them in unity on the basis of their participation in one and the same love. The movement of love is reported by its function of gathering people and uniting them with God, by virtue of the fact that the same stream goes through all of them. *Nota bene*, "through" supposes that the stream stirs what is most intimate in a human being—the heart or true self.[16] As a result, individuals, still preserving their personal identity, are included in a new situation and are inter-connected not by their own mutual sympathy or similar efforts, but a supernatural principle of love.

Here arises the question of whether men communicate with one another or they are simply God-centred. The mutual communication, which is taught by the Church,[17] is expressed by Merton when saying, "Because God's love is in me, it can come to you from a different and special direction that would be closed if He did not live in me, and because His love is in you, it can come to me from a quarter from which it would not otherwise come."[18] Wagner reminds that

[15] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 67.

[16] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 7.

[17] *Catechism of the Catholic Church*, 947, https://www.vatican.va/archive/ENG0015/__P66.HTM (16.04.2023).

[18] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 67.

the union in Christ *has to mean*, being with one another among those who form the Body of Christ.[19] Thus, God's love enables a man to be communicated to others in a new way of supernatural love. God's intention lies in opening a new reference of a man to God and others. This is why talking about flowering of relationships is possible.

An interesting clue is derived by Pope St. Leo, the Great. He emphasises the strictness of the unity between Christ (the Head) and people (the Body): "The head cannot be separated from the members, nor the members from the head"[20] It supposes that there is one life of the whole Mystical Body and one's separateness has not been retained anymore. The Pope points out to the biblical formula motivating that new state: "Not in this life, it is true, but only in eternity will God be all in all"[21] The expression "God is all in all", referring to the line 1 Cor 15, 28, where everything is eternally subjected to Christ and Christ to His Father, clearly outlines that relationships of the saints are simply identical to the life of God and therefore they must efflorescence. "All in all," means that my ability to meet (part of my "all") and also yours will be in some sense the same "all" which is Christ's life in us both. "All" also implies that nobody and nothing is excluded from the common life and that accidentality and transiency are not possible anymore; (there is no other "all") since they are *supplanted* by the oneness of life in God. Both, St. Leo and St. Paul predicate that it will be effectuated in heaven, however, in temporality Christ in His Body is already present and working.

## 3. One Principle—Mutual Penetration in Love

Spiritual theology contributes to the issue with the idea of *one principle* and *one love* in the life of saints. The spiritual perfection consists in the fact that Christ becomes one principle of human life. Then, the formula "all in all" is explained by the notion of the one principle. Its first element is that within the perfect union in heaven, a human person along with its contingent nature, is not

[19] H. Wagner, *Dogmatyka*, trans. J. Zychowicz, Kraków 2007, wyd. Wydawnictwo WAM, p. 490.

[20] Saint Leo the Great, *A sermon 12 on the Passion*, 3,6. https://universalis.com/20230419/readings.htm (21.04.2023).

[21] Saint Leo the Great, *A sermon 12 on the Passion*, 3,6. https://universalis.com/20230419/readings.htm (21.04.2023).

removed in the ontological sense.[22] Preserving personal uniqueness assures that nobody will be deprived of his or her most personal life along with its relationality. Secondly, it is stated that in moral sense, a man and God become one: "Morally speaking he [a man] is annihilated, because the source and agent and term of all his acts is God."[23] The truth that this is God, who becomes a principle of human life, replacing there a human person, procures its explanation provided by Garrigou-Lagrange. He stresses that the divine charity aims to make the moral unification of man and God: "It is characteristic of ardent love to transform us morally into the person loved who is like another self, alter ego."

Furthermore, he portrays a soul who deliberately allows God to be her principle: "[…] holy souls wish Him to reign ever more profoundly in them, to be closer to them than they are to themselves […]."[24] Then, God becomes the real principle, the source of human acts, so that the whole life is divine. Like a piece of wood does not act anything beyond the fire it is put into, then a man does not perform anything different from God's life, but all his life consists in sharing the properties of God's nature.[25] God identifies a life of a creature with His own life, so that it can be described as "God living in God."[26] There is no human initiative excluded from the unity, but the whole personal life lies in God's ardent love. A human freedom is indistinguishable from divine, and human love is also identified with God's love so that they are one.[27] Indeed, God becomes closer to a man than the man was to himself before.

It is not only the individual who participates in this transforming union, but all the saints, on the same basis. It shows how deep and consistent this interconnection in Christ is. Governed by Christ (the Head), each person works with

[22] Cf. T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 282; R. Garrigou-Lagrange, *The Three Ages of the Interior Life. Prelude of Eternal Life*, trans. T. Doyle, Rockford Illinois 1989, wyd. Tan Books And Publishers, vol. II., pp. 531–532.

[23] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 286.

[24] R. Garrigou-Lagrange, *The Three Ages of the Interior Life. Prelude of Eternal Life*, trans. T. Doyle, Rockford Illinois 1989, wyd. Tan Books And Publishers, vol. II., pp. 531–532.

[25] R. Garrigou-Lagrange, *The Three Ages of the Interior Life. Prelude of Eternal Life*, trans. T. Doyle, Rockford Illinois 1989, wyd. Tan Books And Publishers, vol. II., pp. 530.

[26] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 284.

[27] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 282–283.

His power and therefore recognises the other as Christ does. By virtue of participation a man gains divine power to glorify God through others: "His freedom is found in dependence upon God through another."[28] Having been planted in the will of God, human attitudes may now blossom into perfect relationships.

Among numerous descriptions of the eternal life, St. Petrus Damiani underlines its substantial aspects:

"Qui scientem cuncta sciunt, quid nescire nequeunt
Nam et pectoris arcana penetrant alterutrum;
Unum volunt, unum nolunt, unitas est mentium.

Licet cuique sit diversum pro labore meritum,
Caritas hoc suum facit, quod amat in altero;
Proprium sic singulorum commune fit omnium."[29]

"Those who know the Omniscient cannot not to know anything,
They mutually penetrate their intentions of heart;
They want and do not want the same, there is unity of minds.

Though each one gains a different merit for his labour,
The charity makes his own what he loves in the other;
And what is of his own becomes common for all."[30]

The first point is that by participation in God's knowledge, the saints know everything, including the other's heart. Even the inmost and intimate reality is perfectly shared, in imitation of God to whose eyes everything is naked and exposed (Heb 4,13). In addition to this, their wills are harmonised, so that they aim at the same goal. In the second stanza, the singular look shows that the proper worth of someone is interchanged with others. By dint of love what has been contributed by the other becomes mine. The uniting power of love does not keep anything as separated, but shared. Because I love you and you love me, all mine is perfectly yours and all yours is totally mine. And because I love everybody and everybody loves me, all mine belongs to them and all theirs belongs to me. Then, it is easy to put in this context a temporal case of an accidental encounter or a broken relationship in order to see how radically it is

[28] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 265.

[29] Saint Petrus Damiani. *Hymnus de gaudio paradisi*, 13–14, in: Z. Kadłubek, *Rajska radość. Święty Piotr Damiani*, http://www.mediewistyka.pl/content/view/68/40/ (26.04.2023).

[30] Trans. M. Godawa.

transformed in heaven. A man whom I am passing by or, I do no longer contact anymore, will be lovingly penetrated by me and I will be known by him. Then we will be returned to one another in the way that is impossible on earth.

This perspective allows us to better understand the New Testament's prospect of the full development of a human. In *Paul's Letter to the Ephesians* diversity of Christian ways of life is included in building up the new reality of the Body of Christ (Eph 4,11–12). The point is to share the knowledge of Christ and to gain "mature manhood" which consists in having "the extent of the full stature of Christ" (Eph 4,13). Thus, the "mature manhood" means that as united with Christ and just like Him, a man will fully be recognising the other. When Christ is all in all, there is no reason to keep anything in secret, but reversely everything is an additional way of expressing God's glory and prompting common joy.[31] Some radical purification and transformation is required in order to achieve this state of innocence when everybody may be naked before others (cf. Heb 4,13). It is obvious that this extent of sharing is attributed to eternal life which temporality prepares for. Thus, human spiritual life can be depicted as constant progress finding its fulfilment in a flourishing eternity. Indeed, the term "flourishing" deeply characterises this future status of a man with its new possibilities.

However, it should be added that the flourishing relationships, as steeped in God's infinity, will blossom with no limits. It will be, then, possible that a limited nature will participate in infinite love. It is suggested by the topos of reciprocal desire and saturation. Damiani has it, "Inhiantes semper edunt et edentes inhiant"—"When always desiring they eat and when eating they desire."[32] In the Bible the God's Wisdom analogically says of Herself: "Those who eat of me will hunger still, those who drink of me will thirst for more" (Sir 24, 21). It means that the heavenly saturation grows no end, because the more one has, the more he wants to have. Damiani's use of *participium praesens* combined with "semper" interestingly suggests how strictly both desire and saturation are one experience and therefore there is no saturation (limit) without further desire.

[31] T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 67.

[32] Saint Petrus Damiani. *Hymnus de gaudio paradisi*, 16, in: Z. Kadłubek, *Rajska radość. Święty Piotr Damiani*, http://www.mediewistyka.pl/content/view/68/40/ (26.04.2023).

One more testimony is provided by St. Catherine of Siena when she is praising the Holy Trinity: "[…] You, oh eternal Trinity, are a deep Sea, into which the deeper I enter the more I find, and the more I find the more I seek; the soul cannot be satiated in Your abyss, for she continually hungers after You, the eternal Trinity, desiring to see You with light in Your light."[33]

The experience of God is limitless has been expressed by the figure of the fulfilment triggering a new desire and by the general statement that the infinity of God ("a deep Sea", "eternal", "abyss") produces in a soul continual hunger after God. The union with God consists in never-ending exploration of His infinite nature. The awareness of Whom He is Himself reveals the feature of perpetual growth. And because God is so, the experience will have no termination. It has been suggested by the key words of another translation, used in *The Liturgy of Hours*: "never" ("I can never be satisfied") and "ever" ("what I receive will ever leave me desiring more").[34] It can be presumed that they refer to eternal life too. Precisely speaking, this hunger-saturation experience concerns God, but since He is the principle in His saints and since the Head cannot be separated from the Body, the ever-growing experience will be tasted interpersonally. Indeed, in eternity a man more and more intensively explores new dimensions of perfection.[35]

## 4. Spiritual and Philosophical Suggestions

The idea of eternal relationships, as compared to Rosa's notion of resonance, shows interesting references. The resonating ethical attitude is postulated as an effective answer to the problem of alienation (and aggression) stemming from acceleration in time.[36] In eternity, a man, as raised above time, is, by the same

[33] Saint Catherine of Siena, *A Treatise of Obedience* part 11, in: *The Dialogue of the Seraphic Virgin Catherine of Siena*, trans. A. Thorold, London 1907, wyd. Kegan Paul, Trench, Trubner & Co., Ltd., https://www.ccel.org/ccel/catherine/dialog.iv.v.xi.html (22.05.2023).

[34] Saint Catherine of Siena, *On Divine Providence*, 167, https://universalis.com/20230429/readings.htm (30.04.2023).

[35] H. Wagner, *Dogmatyka*, trans. J. Zychowicz, Kraków 2007, wyd. Wydawnictwo WAM, p. 489; Cf. Grzegorz z Nyssy, *Życie Mojżesza*, trans. S. Kalinkowski, Kraków 2009, wyd. Wydawnictwo WAM, pp. 5–10.

[36] H. Rosa, *Alienation and Resonance. Two Modes of Experiencing Time?* International Congress on Time 21–23 November 2019, https://timeworld2019.com/en/ (01.05.2023); Cf. B. Klun, 2022. *Rosov pojem resonance v dialogu s fenomenologijo*, „Bogoslovni vestnik" 82 (2022) 3, 535–546, pp. 536–539.

token, free from alienation which is produced by the disintegration of time levels (everyday, biographical and epochal). In the heavenly reality alienation cannot exist since all belong to all, preserving their own individuality.[37] Thus, the future mutual penetration in love and exchanging personal *givenness* represent an ideal of resonance. The state in which each saint makes other's value his own and gives his own values to be shared by the other, the state which is solely founded on the one principle of Christ's love (God is "all in all"), must be an authentic, living, tender and in perfect resonance. Its essential aspects[38] that are "affection" (being touched by somebody), "e-motion" (moving towards the other) and transformation of self, are effectuated. Also, unpredictability or non-engineerability of resonance meets an analogue in the fact that in the future controlling is replaced by the spontaneous freedom of love. The endless florescence elevates those relationships beyond the level of predictability and planning towards the mystery of life in God.

It should also be admitted that the heavenly interpersonal resonance transcending temporality is, thereby, a specific "mode of being in time", in Rosa's terms. In the Christian view, it still has influence upon temporality. The juxtaposition of temporal and eternal makes room for the notion of hope as a factor forming life in time. The guidance of hope allows us to live properly anticipating future happiness.[39] Just through its hopeful anticipation, the final resonance turns out to be a mode of being in time, so that it can be said that the eschatological interpersonal resonance resonates with temporality. Otherwise, the problem of alienation that is, disintegration of levels of time[40] cannot be ultimately solved. In general, spiritual life is said to be resonance of a man with God[41] which, after the present analysis, embraces interpersonal mutual penetration in love. It can be argued that from this perspective the sociological and philosophical

[37] B. Klun, *Rosov pojem resonance v dialogu s fenomenologijo*, „Bogoslovni vestnik" 82 (2022) 3, p. 539.

[38] H. Rosa, *Alienation and Resonance. Two Modes of Experiencing Time?* International Congress on Time 21–23 November 2019, https://timeworld2019.com/en/ (01.05.2023).

[39] Benedict XVI, *Encyclical Letter Spe Salvi*, 4.10–12, https://www.vatican.va/content/benedict-xvi/en/encyclicals/documents/hf_ben-xvi_enc_20071130_spe-salvi.html (01.05.2023).

[40] H. Rosa, *Alienation and Resonance. Two Modes of Experiencing Time?* International Congress on Time 21–23 November 2019, https://timeworld2019.com/en/ (01.05.2023).

[41] I. Platovnjak, T. Svetelj, *Ancient Greek and Christian Understanding of Contemplation in Terms of a Resonant Attitude Towards the World*, "Bogoslovni vestnik" 82 (2022) 3, p. 624.

proposition of resonance may be perceived as the way to the ideal and that in this field a dialogue between theology and science may be fruitfully conducted.[42]

The notion of anticipating in hope connects the future reality with temporality and sheds light in which temporal experience should be perceived. Our encounters and broken relationships are, subsequently, considered as calling for their efflorescence. Among many indications prompted by this connection, a specific kind of contemplation is worth underlying. The general definition of contemplation: "a simple and loving knowledge of God and His works"[43] shows that God, as its felicitous *object*, is contemplated in unity with His creatures. It means a look at the other for the sake of God and the future perspective of flourishing relationships. Under circumstances of temporality, I recognise you as someone whose life will be penetrated by me and to whom I will be fully dedicated. Despite all failings of our meetings, I just now perceive you as my life in Christ.

It allows me to see the wholeness of your personal being and treat you with respect for the mystery that you are. The fact that your present appearance promises your future revelation, makes me humble and thankful. It prevents me from judging you (cf. Luc 6. 37), as well as from a patchy and harmful perception. Within my attitude, there is room for the hopeful anticipation for the full recognition of you. You are like the Promised Land, flowing with milk and honey, of which only first fruit I have and which I am now perhaps afraid of (cf. Num 13, 23–29).

Then I receive you simply as you are, and not for the sake of my business. I ask "Who are you", not "What could you give to me" and you are in my eyes a person: "Who", not "what". In this way, I share the essential meaning of contemplation.[44] It stimulates me to resist temptation to use you as an object of my lust or other sinful desire. If the perspective of our full mutual penetration in Christ emerges in my eyes, it makes me incapable of fostering an opposite way of doing.

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[42] Saint John Paul II, *Encyclical Letter Fides et Ratio*, 99. 104, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_14091998_fides-et-ratio.html (06.05.2023).

[43] R. Garrigou-Lagrange, *The Three Ages of the Interior Life. Prelude of Eternal Life*, trans. T. Doyle, Rockford Illinois 1989, wyd. Tan Books And Publishers, vol. II., p. 310.

[44] Cf. T. Merton, *New Seeds of Contemplation*, New York 1961, wyd. A New Directions Book, 24th printing, p. 13.

The awareness of the fact that grace transforms us, constitutes the basis for overcoming bias and obstacles. In fact, they could speak to my own imperfectness and help me to open up myself to the truth of the Mystical Body of Christ. My question is: what can I do so as to become a full person, ready for sharing the life of mutual penetration of love in Christ. And this is my personal conversion, with which I am to be especially concerned.

The resonance of eternity with temporality makes forgiving easier and more reasonable. Saint Thomas More testifies to it when arguing that, in every case, the love for enemies is a reasonable solution. If after conversion they are in heaven, they live the same life with their bygone victims, like St. Stephen and St. Paul.[45] Otherwise, the persecutor's eternal condemnation is too hard to be additionally maligned by a victim. This kind of reflection is motivated by the light of eternity.[46]

It is clear that the hope is a necessary environment to live as an integrated and still flourishing person. Present incompleteness calls for perfection. However, this contemplation of the other is ushered into something absolutely fundamental. This is the contemplation of God, the source of every living. Therefore, the special meaning is ascribed to this kind of spiritual docility, by which a man is introduced into the infinite mystery of God's life.

Concluding, it can be argued that the problem of accidental encounters and broken relationships gains its solution in the reality of the eternal union of the saints with Christ. The fact that Christ is the only principle of their lives, constitutes a new state in which mutual penetration and interchanging in love takes place. The fact that every contact turns into a perfect and steady relationship can be named "a flourishing relationship". The term "flourishing" especially applies to the infinity of future life. This truth is ushered in the reality of the Church as the Mystical Body of Christ and can be found in the Biblical revelation as well as in spiritual writings (Augustine, Damiani, Catherina of Siena, Leo the Great, Merton). In connection with some philosophical fields, the message of flourishing relationships should enliven the experience of hope being a mode

[45] *The Life of Saint Thomas More c. 1556 by William Roper*, pp. 54–55, https://thomasmorestudies.org/wp-content/uploads/2020/08/Roper.pdf (24.05.2023).

[46] M. Godawa, *Joyful Transcendence in Christ. Preparation for Martyrdom in Saint Thomas More's Spiritual Experience*, in: J. Juhant, B. Žalec (eds.), *Understanding Genocide and Suicide*, Zürich 2015, wyd. LIT Verlag, pp. 138–139; Cf. Saint T. More, *A Godly Instruction [on How to Treat Those Who Wrong Us]*, https://thomasmorestudies.org/wp-content/uploads/2020/08/A-Godly-Instruction-Modernized.pdf (14.05.2023).

of (eternal) life resonating in time. It underlies the specific contemplation of the other as related to God. Then, the perception of the other regarding the future efflorescence (mutual penetration through Christ) shapes moral and spiritual attitudes. The eschatological status arises, thus, as a factor not alienated, but fundamental to live a temporal life.

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# Verso una rinnovata mistagogia L'impostazione della mistagogia basata sulla tipologia biblica

## Abstract

Biblical typology is the basis of any mystagogy because, through it, the Christian sees the entire plan of God unfolded, fulfilled in Christ, along with the persons, realities, and events that prophetically prefigured His coming. In various fields of theological reflection, the term „mystagogy", so dear to the liturgical and spiritual tradition of Christian antiquity, has emerged with renewed vigour. In the great patristic mystagogies, the biblical passage takes center stage and shapes the very method of mystagogy: for the Fathers, mystagogy is nothing other than biblical typology applied to the liturgy. Therefore, in order to fully participate in the mysteries of Christ and his message, it is necessary to appropriate and adopt biblical typology. Only this enables us to move toward a renewed mystagogy.

## Keywords

typos, figura, tipologia, mistagogia, catechesi mistagogiche, esegesi tipologica, sacramentalità

## 1. Introduzione—la tipologia

La tipologia, che cercheremo di approfondire in questo articolo, è un metodo di lettura sia della Scrittura sia della storia della salvezza, comune alla tradizione cristiana ed ebraica. Essa è presente già nell'Antico Testamento, in cui i passati interventi di salvezza di Dio sono un paradigma di quelli futuri. Il Nuovo Testamento usa il linguaggio tipologico per parlare di Cristo, compimento delle figure (traduzione latina di τύπος) dell'Antico Testamento.

L'apostolo Paolo usa il linguaggio tipologico per spiegare il battesimo. Nel testo di Romani 6,5, infatti, Paolo scrive che noi siamo stati battezzati „nell'immagine (τῷ ὁμοιώματι) della sua morte."[1] Nel Vangelo di Giovanni riscontriamo una vera e propria struttura tipologica a triplice dimensione, costituita dal mistero di Cristo che si sviluppa su tre piani: quello dell'Antico Testamento che lo prefigura, quello del Vangelo che lo compie, quello della liturgia e dei sacramenti che lo prolungano. La tipologia, quindi, è presente nell'Antico Testamento e anche nel Nuovo, anzi nel Nuovo è già applicata alla sacramentalità.

Nell'epoca patristica, fino alla metà del IV secolo, il metodo di Paolo e di Giovanni rimase esemplare. Nelle grandi mistagogie patristiche, il brano biblico è al centro della scena e impone il suo linguaggio al metodo stesso della mistagogia: per i Padri, infatti, la mistagogia non è niente altro che la tipologia biblica applicata alla liturgia. La terminologia utilizzata per esprimere la sacramentalità, poi, era la stessa della tipologia biblica, perché aveva lo stesso fondamento.

Ecco gli esempi di alcuni di questi termini, che sono divenuti le basi del vocabolario della sacramentalità: mistero, sacramento, figura, immagine, immagine-verità, tipo-antitipo, somiglianza, similitudo.[2] La figura (τύπος, *figura*) infatti è, già per il linguaggio biblico, una realtà che ne contiene un'altra, per il motivo che il mistero di Cristo esiste prima di Cristo, ed è questo mistero stesso che agisce nell'Antico Testamento. Questo principio è posto per fede nel Nuovo Testamento, là dove esso dice che il *Logos* che era presso Dio fin dal principio è quello stesso che ha preso la carne in Gesù (cf. Gv 1,1ss).

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[1] Ciò, secondo lo studio di Ugo Vanni, è una espressione che significa: „nel sacramento della sua morte". Per tutto ciò cf. U. Vanni, *Homoioma in Paolo*, „Gregorianum" 58 (1977), pp. 321–345.

[2] E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, Roma 21996, CLV—Edizioni Liturgiche, p. 196; cf. anche V. Grossi, *I Sacramenti nei padri della Chiesa. L'iter semiologico—storico—teologico,* (Sussidi Patristici 15), Roma 2009, Institutum Patristicum Augustinianum, p. 22.

È dunque necessario, per comprendere il linguaggio biblico e il suo messaggio sul mistero di Dio, appropriarsi della tipologia. Questo ci permetterà il passaggio verso una nuova mistagogia.

## 2. Alcune caratteristiche principali della tipologia del Nuovo Testamento

Nei testi di san Paolo[3] la tipologia viene eretta a principio generale di interpretazione dell'economia antica: „*Hæc omnia autem in figura (typicôs) contingebant illis*" (1Cor 10,11). Paolo vede in Adamo il tipo del Cristo (Rm 5,14), nella creazione dell'uomo e della donna il mistero di Cristo e della Chiesa (Ef 5,32), nei due figli di Abramo il tipo delle due alleanze (Gal 4,22; 5,1), nella storia dell'Esodo il tipo del battesimo cristiano (1Cor 10,6s), nella legge l'ombra delle realtà future (Col 2,17). La prima lettera di Pietro è vista dagli esegeti come un'omelia pasquale indirizzata ai neofiti, in cui il battesimo appare come una nuova uscita dall'Egitto, e tutta la vita cristiana è descritta con i colori dell'Esodo. La lettera agli Ebrei è tutta costruita sul principio che l'antica legge è figura (*typos*) dei tempi cristiani, e fonda sull'Antico Testamento tutta una teologia del sacerdozio di Cristo.

L'Apocalisse traspone tipologicamente nell'escatologia numerosi tratti della storia del popolo di Dio, soprattutto del ciclo dell'Esodo (piaghe d'Egitto, cantico di Mosè, dossologia, ecc.). Ma è soprattutto in Giovanni che la tipologia trova una feconda applicazione. Egli vede „nell'Antico Testamento la figura, non delle circostanze della vita di Cristo, come Matteo, ma dei suoi misteri. Più esattamente, mostra il mistero del Cristo che si svolge su tre piani: quello dell'Esodo che lo prefigura, quello del Vangelo che lo compie, quello dei sacramenti che lo prolungano… I Sacramenti ricevuti sono eventi divini che continuano i *magnalia Dei* del tempo dell'Esodo e del tempo della Passione e della Resurrezione. I misteri della vita di Cristo sono anzitutto il compimento dell'Esodo."[4]

[3] Per convenzione chiamiamo „testi di san Paolo" tutti quelli che nel NT sono canonicamente a lui attribuiti. Lo stesso criterio vale per tutti gli altri libri biblici citati.

[4] M. Magrassi, *Tipologia biblica e patristica e Liturgia della Parola,* „Rivista Liturgica" 53 (1966), pp. 174–175.

Ma la tipologia giovannea ha ancora un'altra dimensione, gli avvenimenti della vita di Cristo annunciano tipicamente la vita liturgica della comunità.[5] Le nozze di Cana (Gv 2) sono figura del banchetto eucaristico. La moltiplicazione dei pani, alla luce del discorso nella sinagoga di Cafarnao (Gv 6,59), se da una parte richiama la manna, dall'altra annuncia tipicamente la moltiplicazione del pane eucaristico alla comunità riunita per il banchetto del Signore. Al battesimo cristiano accennano la guarigione del paralitico nella piscina di Betzatà (Gv 5) e del cieco nato che va a lavarsi alla fontana di Siloe (Gv 9). E quando sul pozzo di Giacobbe Gesù parla dell'acqua zampillante che egli darà e che disseta in eterno (Gv 4), fa un duplice riferimento: uno esplicito, all'acqua che i giudei bevettero a quel pozzo, l'altro implicito, alla rigenerazione battesimale che rinnova una volta per sempre.

Si intuisce facilmente quale interesse riveste per la liturgia questa tipologia a dimensione triplice: essa è precisamente l'anello di congiunzione tra la tipologia del Nuovo Testamento e quella dei Padri e della liturgia, che si collocherà prevalentemente su un piano misterico-sacramentale. Il complesso di questi temi dà alla tipologia del Nuovo Testamento un rilievo e una centralità che si potranno difficilmente misconoscere. „Non si tratta di una semplice illustrazione attraverso simboli di indubbia efficacia: in altri termini, non si tratta di temi letterari. Si tratta di una prospettiva teologica fondamentale per cui il mistero del Cristo è visto come il prolungamento e insieme il superamento dei grandi eventi della storia di Israele. E con ciò l'Antico Testamento, è integrato nel piano eterno di Dio."[6]

Si tratta quindi di una prospettiva teologica fondamentale canonizzata dal IV evangelo stesso, nella quale il mistero di Cristo è visto come il prolungamento e il superamento dei grandi eventi della storia di Israele. Gli avvenimenti della vita di Cristo, a loro volta, annunciano tipicamente la vita liturgica della comunità.

## 3. Caratteristiche principali della tipologia patristica e *iter* delle catechesi mistagogiche

L'epoca patristica, raccogliendo le indicazioni del Nuovo Testamento, diede all'interpretazione tipologica uno sviluppo e una sistemazione imponenti, prolungando soprattutto la corrente giovannea misterico-sacramentale. I tre punti

[5] Cf. M. Magrassi, *Tipologia biblica e patristica e Liturgia della Parola*, p. 175.

[6] M. Magrassi, *Tipologia biblica e patristica e Liturgia della Parola*, p. 176.

di vista fondamentali con cui i Padri guardano all'Antico Testamento in rapporto al Nuovo sono: preparazione, annunzio profetico, tipo o figura.[7] Scrive appunto un antiocheno, il Crisostomo: „C'è una profezia che si esprime con parole, e ce n'è un'altra che si esprime a fatti, che sono figure o immagini (*typoi*)."[8]

Tutta l'esegesi patristica si applicò con fervore a leggere nell'Antico Testamento i misteri del Cristo e della Chiesa. Il procedimento consiste nel far emergere la portata profonda e oggettiva di un testo e di un fatto alla luce dell'economia totale della salvezza, alla luce del compimento ultimo che è il Cristo: „è la classica tipologia biblica, fondata sui profeti e sul Nuovo Testamento."[9]

Il patrologo Jean Daniélou, a sua volta, così descrive il rapporto fra il simbolismo scritturistico e quello sacramentale: „Per i Padri, liturgia, Scrittura, mistica, teologia riposano su un certo numero di temi fondamentali comuni che sono le chiavi della mentalità patristica… Essi si riallacciano a vari temi scritturistici… Il compito del catecheta, quello di Cirillo nelle sue catechesi mistagogiche, è di rendere intelligibili i riti, di fare conoscere il loro significato simbolico, affinché essi raggiungano il loro fine che è quello di condurci per mezzo delle cose visibili alle cose invisibili, e non di essere il compimento meccanico di gesti quasi magici… Notiamo la perfetta corrispondenza del simbolismo scritturistico e del simbolismo battesimale… Rimarchiamo la parola antitipo, una delle più importanti per la teologia sacramentaria, che significa a un tempo rappresentazione e partecipazione al mistero della morte e della resurrezione."[10]

Vi è quindi una perfetta corrispondenza fra il simbolismo scritturistico e il simbolismo sacramentale; il termine antitipo significa a un tempo rappresentazione e partecipazione al mistero di Cristo: perciò questo termine è uno dei più importanti nel campo della teologia sacramentaria.

Jean Daniélou, in alcune delle sue opere, si occupa in modo approfondito dello studio della tipologia biblica, e di come essa venga dai Padri utilizzata come esegesi spirituale e catechesi mistagogica: „Questo metodo applicato alla Scrittura si chiama esegesi spirituale; applicato alla liturgia si chiama mistagogia: essa consiste nel leggere nei riti i misteri di Cristo e nel contemplare sotto

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[7] Cf. M. Magrassi, *Tipologia biblica e patristica e Liturgia della Parola*, p. 178.

[8] Ioannes Chrysostomus, *De Pœnitentia Homiliæ* 6,4, in: J.P. Migne et alii (eds.), *Patrologiæ cursus completus [Series Græca]* 49, Paris 1862, Apud Garnier Fratres et J.-P. Migne Successores. p. 320.

[9] M. Magrassi, *Tipologia biblica e patristica e Liturgia della Parola*, p. 178.

[10] J. Daniélou, *Le symbolisme des rites baptismaux*, „Dieu Vivant" 1 (1945), pp. 22–24.

i simboli la realtà invisibile."[11] Rispetto all'oggetto della tipologia, scrive: „l'oggetto della tipologia è la ricerca delle corrispondenze tra gli avvenimenti, le istituzioni e i personaggi dell'Antica Alleanza e quelli della Nuova Alleanza, che è inaugurata con la venuta di Cristo e sarà consumata alla Parusia."[12]

Sulle orme di Jean Daniélou ha proseguito Enrico Mazza, che nel suo studio sulle catechesi liturgiche della fine del IV secolo, descrive il metodo mistagogico dei Padri come un percorso in cinque tappe[13], attraverso le quali viene costruita la teologia dei sacramenti. Le cinque tappe sono:

1. la descrizione del rito, del gesto, dell'azione o del formulario liturgico;
2. la risalita dal rito al racconto biblico dell'evento di salvezza (sia nel Nuovo Testamento che nell'Antico), ossia l'identificazione della citazione biblica che descrive l'evento di salvezza;
3. la comprensione più profonda dell'evento di salvezza con ricorso ad altri testi del Nuovo Testamento o dell'Antico Testamento;
4. la ridiscesa al rito, ossia l'applicazione alla liturgia di tutto ciò che nella Scrittura si è trovato a proposito dell'evento di salvezza;
5. e poi il tutto (la risalita all'evento e la ridiscesa al rito) condensato in un solo nuovo termine tecnico/sacramentale: mistero, sacramento, figura, immagine, immagine-verità, tipo-antitipo, somiglianza, *similitudo*.

Enrico Mazza afferma anche che, dopo aver percorso le cinque tappe: „ci rendiamo conto dei motivi per cui la sacramentalità non ha una terminologia sua propria, ma la importa dall'ermeneutica biblica, ossia dalla tipologia biblica."[14] Ne segue che il problema della mistagogia dovrà essere sempre visto in stretto legame con il problema della tipologia biblica. Solo un'adeguata soluzione delle questioni della tipologia biblica permetterà una corretta impostazione della teologia mistagogica. Quando questa terminologia fa uso di binomi come, ad esempio, immagine-verità, tipo-antitipo, viene così messo in particolare evidenza l'aspetto relazionale del sacramento, ossia la relazione che intercorre tra il rito liturgico e l'evento di salvezza. „Questa terminologia non è nata dalla

[11] J. Daniélou, *Le symbolisme des rites baptismaux*, p. 17.

[12] J. Daniélou, *Qu'est-ce que la typologie?*, in: P. Auvray et alii (eds.), *L'Ancien Testament et les chrétiens*, Paris 1951, Éditions du Cerf, p. 199.

[13] Cf. E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, pp. 195–196.

[14] E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, p. 196.

sacramentalità stessa: è un vocabolario di importazione che nasce dal linguaggio tecnico della tipologia biblica."[15]

In questo testo è importantissimo notare che Mazza ha in mente di delineare i tratti per una nuova mistagogia, adatta all'età contemporanea, la quale potrà essere fatta unicamente in stretto legame e approfondimento della tipologia biblica. Infatti „solo un'adeguata soluzione delle questioni della tipologia biblica, permetterà una corretta impostazione della teologia mistagogica." Il metodo interpretativo dei sacramenti è tipologico perché i sacramenti stessi sono una realtà tipologica, e infatti questo metodo è possibile solo se la natura dei sacramenti è, in quanto tale, imitazione. „La tipologia biblica applicata alla liturgia non è frutto di ispirazione o di particolare genialità degli autori; è frutto di una tecnica e un metodo rigoroso, sapientemente applicati, che sono identici in tutti gli autori, anche se il risultato è diverso a seconda delle capacità e delle doti personali dei vari autori. La conoscenza della Scrittura è la prima di queste doti, e subito dopo c'è la capacità letteraria dell'omileta."[16]

Infine, Mazza presenta un interessante auspicio per il futuro della mistagogia: „Se qualcuno oggi possedesse la competenza e la capacità di usare con naturalezza la tipologia biblica, sarebbe in grado di costruire, senza troppa difficoltà, delle catechesi sui misteri degne di stare alla pari con quelle di Cirillo e di Ambrogio… Come conseguenza di ciò, si indulgerebbe alla descrizione delle figure bibliche, e così si privilegerebbe il metodo narrativo rispetto ad istanze dottrinali, sistematiche e, più propriamente, speculative… Il metodo tipologico si presenta, appunto, con questa finalità: la comprensione del mistero."[17]

Quindi la via verso una nuova mistagogia, adatta ai nostri tempi, consisterebbe nell'avere una preparazione tale da possedere la competenza e la capacità di usare con naturalezza la tipologia biblica. Perché la visione tipologica, come nota Vittorino Grossi, è alla base della mistagogia: „La visione tipologica è alla base della mistagogia, rinviene infatti i tipi che nel corso della storia danno ragione dei segni sacramentali riempiendoli di significato. La dinamicità del

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[15] E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, p. 196.

[16] E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, p. 197.

[17] E. Mazza, *La mistagogia. Le catechesi liturgiche della fine del quarto secolo e il loro metodo*, pp. 17–18.

segno non si esaurisce nell'esegesi e neppure con l'avvento di Cristo che giustifica il sacramento."[18]

## 4. Criteri determinanti per l'uso della scrittura nella liturgia

È la liturgia, la *lex orandi*, che ci riporta nel cuore della tipologia neotestamentaria. Infatti, i testi consacrati dalla liturgia mediante la scelta delle letture nei momenti più solenni delle sue celebrazioni, sono stati consacrati in linea perfetta con l'ottica ermeneutica del Nuovo Testamento. Per gli autori del Nuovo Testamento, il mistero di Gesù (e il significato della sua incarnazione, morte, resurrezione e ascensione al cielo, fino alla ricapitolazione in lui di tutte le cose), è comprensibile unicamente alla luce dell'Antico Testamento. Infatti, nel mistero di Gesù, vero Dio e vero uomo, trovano il loro compimento tutte le promesse e le attese dell'Antico Testamento. Gesù è il mistero „avvolto nel silenzio per secoli eterni, ma ora manifestato, tramite le Scritture profetiche" (Rm 16,25–26). Infatti „il mistero di Cristo non fu manifestato agli uomini delle precedenti generazioni, come ora è stato rivelato ai suoi santi apostoli e profeti per mezzo dello Spirito" (Ef 3,4–5). Gesù, quindi, è „il mistero nascosto da secoli in Dio, creatore dell'universo" (Ef 3,9): infatti, come afferma san Paolo, „il mistero di Dio è Cristo" (Col 2,2).

Secondo questa „rivelazione dello Spirito" (Ef 3,5), gli autori del Nuovo Testamento, per descrivere il mistero di Cristo, utilizzano citazioni esplicite dell'Antico Testamento. Ma, molto di più ancora, è certamente possibile dire che essi sottintendono una quantità enorme di allusioni e di richiami impliciti a eventi, persone, istituzioni e realtà veterotestamentarie. Queste realtà hanno non solo il loro significato e valore all'interno della storia del popolo d'Israele (di cui tutti gli autori neotestamentari facevano parte), ma indicano anche, a motivo della loro valenza profetica, la salvezza futura, che ha avuto il suo inizio con la comparsa del Messia Gesù. Infatti, gli autori del Nuovo Testamento „dipingendo i tratti nuovi dell'azione e della persona di Gesù, usarono gli antichi colori che la 'tavolozza' dei racconti biblici metteva a loro disposizione. In questo modo ritornavano ai testi dell'Antico Testamento rileggendoli e ricomprendendoli alla luce della novità cristologica, che forniva così inedite e inaspettate sfumature di senso."[19]

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[18] V. Grossi, *I Sacramenti nei padri della Chiesa. L'iter semiologico—storico—teologico,* p. 32.

[19] A. Martin, *La tipologia adamica nella lettera agli Efesini*, Roma 2005, Editrice Pontificio Istituto Biblico, p. 10.

Quindi l'ambito della celebrazione liturgica é proprio quello della mistagogia sacramentale: é qui che la tipologia definisce rapporto fra le due economie.[20]

## 5. L'importanza della tipologia ribadita da alcuni autori del movimento liturgico

Uno dei maggiori esponenti del movimento liturgico, Louis Bouyer, afferma che, se si vuole comprendere la liturgia occorre comprendere la Bibbia. „Che lo si voglia o no, in effetti, studiare la liturgia è studiare la Bibbia, perché la liturgia è ancora la Bibbia… Non si gusta né si comprende più la liturgia perché non si gusta e non si comprende più la Bibbia… Ma a sua volta la Bibbia non è più gustata né compresa perché l'esegesi spirituale è misconosciuta e, più ancora, sconosciuta."[21] Dello stesso parere anche Aimé-Georges Martimort afferma che „non si può avanzare nella conoscenza della liturgia, senza fare allo stesso tempo un progresso nella conoscenza del mondo biblico."[22]

Cipriano Vagaggini, nota che l'uso della tipologia nella liturgia è abbondantissimo. Egli scrive: „La tipologia, nella Bibbia e nella liturgia, è una certa relazione che esiste tra due cose diverse nelle quali si concretizza lo stesso mistero di Cristo nelle due diverse fasi di realizzazione successiva, quando tutte e due le cose, nelle intenzioni di Dio, realizzano lo stesso aspetto di questo mistero nelle diverse sue fasi di svolgimento storico successivo, di modo però che la cosa storicamente antecedente, agli occhi di Dio, renda possibile, prepari, la cosa susseguente e ne sia come una prima realizzazione ancora imperfetta, come in abbozzo o in schizzo; prima realizzazione che ha tutta la sua ragion d'essere nella cosa susseguente che la compie."[23]

In questo contesto, ci è parsa molto importante la figura di Sofia Cavalletti, che, pur non essendo una studiosa di liturgia, ha ideato una catechesi per bambini nella quale Bibbia e liturgia sono intimamente connesse tramite, appunto, l'esegesi tipologica. Ella afferma: „Non esiste una Bibbia che si studia e si legge,

[20] Cf. N. Aracki Rosenfeld, *La lettura tipologica del complesso sacramentale*, in: P. Nowakowski, J. Mieczkowski (eds.), *W służbie tradycji i odnowy liturgicznej, 50 lat Instytutu Liturgicznego w Krakowie (1968–2018)*, Krakow 2019, p. 202.

[21] L. Bouyer, *Liturgie et exégèse spirituelle*, „La Maison-Dieu" 7 (1946), pp. 27–30.

[22] A. G. Martimort, *La liturgie. Actualisation célébrée du dessein de Dieu* (Session doctrinale Montmagny 5–13 Juillet 1956), Paris 1956, Commission des Études Religieuses, p. 43.

[23] C. Vagaggini, *Il senso teologico della Liturgia*, Roma 1957, Edizioni Paoline, pp. 370–371.

e una Liturgia che si vive; esiste una Bibbia che si vive nella Liturgia."[24] Riguardo alla tipologia, la Cavalletti spiega in modo didattico che il metodo di lettura biblica è il metodo tipologico. Esso è: „quel metodo di esegesi che, partendo dalla fase presente della storia della salvezza, ricerca le radici di essa nei fatti, istituzioni e persone dell'Antico Testamento, oppure, partendo dall'Antico Testamento, lo legge alla luce degli avvenimenti del Nuovo; il metodo tipologico ricerca, cioè 'l'impronta' di una fase della storia nell'altra; tenendo presente l'unità del piano divino, dalla creazione alla parusia. Come in una matrice è già presente l'immagine che essa lascerà, senza essere evidente, così il 'tipo' contiene la realtà futura, ma in modo misterioso; in esso la realtà significata è un germe che attende di svilupparsi. Nel seme è presente in qualche modo la pianta che ne nascerà; pianta e seme, pur essendo distinti, sono intrinsecamente connessi."[25]

Ciò che è interessante in questa definizione della tipologia, è che la Cavalletti definisce come tipo l'impronta di una fase della storia nell'altra, tenendo presente l'unità del piano divino dal principio alla fine.

## 6. Conclusione: Verso una „nuova" mistagogia

Prima di trarre le nostre conclusioni, è necessario premettere una precisazione molto importante. In questo articolo non si intende affrontare il tema del valore intrinseco del primo Testamento e delle azioni salvifiche di Dio a favore del popolo dell'Alleanza. Il tema meriterebbe un'altra ricerca, altrettanto impegnativa. Nel presente articolo, in merito a questo tema, ci siamo limitati, in alcuni punti, a parafrasare o riassumere i testi neotestamentari citati e il pensiero degli autori citati. Non era possibile, nell'ambito di questa ricerca, utilizzare terminologie diverse o introdurre altri concetti. Nonostante ciò, dobbiamo in ogni caso discostarci da una certa visione che ci appare riduttiva. Ricordiamo che abbiamo scelto di muoverci utilizzando la lettura canonica, che presuppone l'unità dei due Testamenti, la loro verità storica di fondo e l'ispirazione della Scrittura da parte dello Spirito Santo.

Prendiamo ad esempio questo pensiero di Leonhard Goppelt, che il tipo non è una versione in miniatura dell'antitipo, ma è una prefigurazione in uno stadio

[24] S. Cavalletti, *La storia del Regno di Dio, Dalla creazione alla parusia*, Todi 2009, Tau editrice, p. 96.

[25] S. Cavalletti, *La storia del Regno di Dio, Dalla creazione alla parusia*, p. 21.

differente della storia della salvezza, che indica le caratteristiche essenziali delle realtà future, e che perde il suo significato quando esse appaiono.[26] Il tipo in realtà non può perdere il suo significato, in quanto è una realtà storica, un evento di rivelazione e di salvezza operato da Dio verso un ben preciso popolo che, storicamente, non solo ancora esiste, ma continua a testimoniare la verità del proprio percorso di fede.

Il fatto, ad esempio, che l'esegesi storico-critica abbia messo in dubbio alcuni eventi della salvezza come sono narrati dagli autori biblici, non inficia affatto una realtà fondamentale: questo popolo, ai tempi dell'incarnazione di Cristo, era forse l'unico popolo monoteista della terra. E forse era anche l'unico popolo il cui Dio, nella fase finale della propria rivelazione (soprattutto nei profeti), si è manifestato come il Dio amante e perdonatore. Il popolo era stato condotto verso questa rivelazione da milleni di pedagogia divina. La rivelazione neotestamentaria sull'incarnazione del Cristo Dio, poteva innestarsi unicamente su questo terreno. Ricordiamo il discorso di san Paolo sulla radice e sui rami, e la conclusione finale: „da loro proviene Cristo secondo la carne, egli che è sopra ogni cosa, Dio benedetto nei secoli. Amen" (Rm 9,4–5. cf. Rm 11,16–18; Rm 15,8).

La tipologia, quindi, è agli antipodi dell'esegesi filoniana, totalmente a-storica. L'apparire di Cristo Gesù, compimento di tutte le promesse, nella storia umana, indica che un nuovo mondo celeste è già cominciato sulla terra. A questo mondo celeste e a questa nuova creazione appartengono tutti coloro che partecipano dello Spirito di Cristo, lo Spirito d'amore, come afferma Giovanni: „Carissimi, amiamoci gli uni gli altri, perché l'amore è da Dio: chiunque ama è generato da Dio e conosce Dio. Chi non ama non ha conosciuto Dio, perché Dio è amore" (1 Gv 4,7–8).

Possiamo quindi affermare che nell'Antico Testamento è tipologico tutto ciò (persone, eventi ecc.) che partecipa dello Spirito di Cristo. Ad esempio, il Davide adultero e omicida non è figura di Cristo. Invece lo è il Davide che perdona al suo persecutore, Saul. Non è immagine di Cristo il Salomone che si volge, in vecchiaia, all'idolatria, trascinando tutto il suo popolo con sé. Invece lo è il Salomone re giusto e saggio, che manifesta la giustizia, la sapienza e la regalità di Dio. Di queste prefigurazioni, Gesù Cristo è il compimento. L'individuazione del tipo potrebbe essere piuttosto semplice, utilizzando questo criterio.

[26] Cf. L. Goppelt, *Typos. The Typological Interpretation of the Old Testament in the New,* Grand Rapids MI 1982, William B. Eerdmans Publishing Company, p. 177.

Non può essere prefigurazione della nuova creazione portata da Cristo la guerra di conquista, trascesa espressamente dal Cristo nell'orto degli ulivi, nel momento in cui impedisce a Pietro di usare la spada anche solo per legittima difesa.

È possibile affermare quindi che sono tipi di Cristo, sue immagini, sue icone, sue figure, soltanto gli eventi, le persone, le realtà, che, partecipando dello Spirito di Cristo, portano il sigillo della sua divinità: „ Dio è luce, Dio è amore" (1 Gv 1,5; 4,8). Per riconoscere queste figure, e la misura in cui esse partecipano dello Spirito di Cristo, è necessario confrontarsi con i Vangeli e con alcuni testi della Scrittura, come ad esempio il famoso brano di san Paolo ai Galati: „Il frutto dello Spirito è amore, gioia, pace, pazienza, benevolenza, bontà, fedeltà, mitezza, dominio di sé; contro queste cose non c'è legge" (Gal 5,22–23).

O questo tratto del Libro della Sapienza: „Nella sapienza c'è uno spirito intelligente, santo, unico, molteplice, sottile, mobile, penetrante, senza macchia, terso, inoffensivo, amante del bene, acuto, libero, benefico, amico dell'uomo, stabile, sicuro, senz'affanni, onnipotente, onniveggente e che pervade tutti gli spiriti intelligenti, puri, sottilissimi. La sapienza è il più agile di tutti i moti; per la sua purezza si diffonde e penetra in ogni cosa. È un'emanazione della potenza di Dio, un effluvio genuino della gloria dell'Onnipotente, per questo nulla di contaminato in essa s'infiltra. È un riflesso della luce perenne, uno specchio senza macchia dell'attività di Dio e un'immagine della sua bontà. Sebbene unica, essa può tutto; pur rimanendo in se stessa, tutto rinnova e attraverso le età entrando nelle anime sante, forma amici di Dio e profeti. Nulla, infatti, Dio ama se non chi vive con la sapienza" (Sap 7,22–28).

Lo Spirito Santo, effluvio della bontà di Dio, attraverso le età, entrando nelle anime sante, forma amici di Dio e profeti. Per questo le figure che sono apparse prima di Cristo, hanno tutte una valenza profetica: è un balenare della luce di Dio nella storia, che attende il sorgere del sole. Inoltre, Gesù Cristo non è il compimento di tutte le figure solo perché lo afferma il Nuovo Testamento: lui lo è perché ha incarnato storicamente—nella sua vita e nel suo corpo trasfigurato e risorto—tutta la pienezza dell'amore, della luce e della vita di Dio: „In lui abita corporalmente tutta la pienezza della divinità" (Col 2,9).

Fu nella sua vita storica sulla terra che Gesù divenne perfetto nella sua obbedienza al Padre, a motivo delle cose che patì. „Cristo… pur essendo Figlio, imparò tuttavia l'obbedienza dalle cose che patì e, reso perfetto, divenne causa di salvezza eterna per tutti coloro che gli obbediscono" (cf. Eb 5,7–9). Tutto ciò sottrae completamente la tipologia dall'ambito di una ricerca puramente

letteraria o esegetica. Per questo motivo la tipologia biblica può essere la base di ogni mistagogia: perché in essa il cristiano vede dispiegato tutto il progetto di Dio, compiuto in Cristo, e le persone, le realtà e gli eventi che hanno prefigurato profeticamente la sua venuta.

Questa prospettiva completamente storica è la caratteristica peculiare della rivelazione. E la prospettiva dell'incarnazione di Dio nell'uomo (*et homo factus est*) è il mistero più grande e il perno di tutto il mistero cristiano. Togliere ai *tipi* il loro spessore storico, toglierebbe anche la forza spirituale e l'impatto della mistagogia su coloro che vanno iniziati ai misteri. Senza parlare del fatto che verrebbe inficiata la realtà della comunione dei santi passati, presenti e futuri. Sarebbe come un rimanere senza radici. L'ascolto della Scrittura rivela il mistero di Dio in esso contenuto, nel momento in cui lo comprendiamo all'interno di un approccio tipologico e di fede, vedendo cioè in Gesù il compimento delle promesse di Dio. Altrimenti l'ascolto della Scrittura sarebbe solo uno studiare la Bibbia, e non un attingere al mistero di Dio.

Il dialogo reciproco, interdisciplinare, fra esegesi, patristica, teologia sacramentaria e spiritualità in connessione con la liturgia avrà il pregio di saldare l'unità dei due Testamenti. Da esso scaturirà naturalmente una nuova mistagogia. Essa introdurrà i cristiani alla partecipazione ai misteri di Cristo. E questa partecipazione misterica si compie nella nostra incarnazione reale della vita di Cristo e dei sentimenti di Cristo: „Abbiate in voi gli stessi sentimenti che furono in Cristo Gesù" (Fil 2,5).

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# Procedimento come principio inespresso

## Proceeding as an Unexpressed Principle

### Abstract

This paper discusses the possibility pertaining to the field of a new principle of law theorised, according to the communion ecclesiology issued by the Second Vatican Council. By considering the accurate proceeding disposition, the author accepts that a new principle constitutes necessary rules for the correct functioning of the canon law system and, as such, are inducted from the legal reasoning of those entitled to take legal decisions in the process of applying the law, especially the judiciary. Furthermore, it could constitute an integrative tool of the entire legal system. Such a new principle is understood to be of great value, because of the significant role assigned to principles in the theory of law in general. In every case, a new principle evokes by, and alludes to, values that govern the entire canon law science.

### Keywords

principles of law, ecclesiology of the Second Vatican Council, theory of law, juridical reasoning, canon law tradition

## 1. Introduzione

A sessant'anni dall'apertura del Concilio Vaticano II (1962–2022), rimangono del tutto attuali i riferimenti fondativi e irrinunciabili dell'ordinamento ecclesiale secondo l'indicazione della Costituzione apostolica *Sacræ Discipliæ Leges* che presenta il Codice di diritto canonico latino come la — necessaria — traduzione in linguaggio canonistico della ecclesiologia dello stesso Vaticano II.[1] Si dà per acquisito che il principio *a Concilio ad Codicem*, nonostante il naturale sviluppo della scienza canonica, deve continuamente ispirarsi a quanto è stato dottrinalmente fissato, in riferimento alla Chiesa, nella Costituzione dogmatica *Lumen Gentium*, cui — per altro — il legislatore rimanda espressamente quale chiave interpretativa del Codice latino promulgato nel 1983. Risulta che proprio nella sostanzialità dell'orientamento conciliare occorre cercare i concreti elementi dogmatici capaci di supportare e sostenere una nuova struttura — anche teorica — dell'intero ordinamento canonico. In altre parole: è ormai fondamentale il compito della dottrina di rintracciare, nell'insegnamento magisteriale del Concilio, la struttura di base cui ricondurre un ulteriore contenuto della riflessione teorica e sistematica in modo da poter evidenziare percorsi coerenti con la rinnovata consapevolezza di sé che la Chiesa ha espresso durante il Concilio stesso. Dato per certo che si tratta di una sfida, ma anche di una grande opportunità per la canonistica contemporanea, tramite le pagine che seguono, si vuole segnalare che l'attenzione data a quanto implica (o, può implicare) il termine giuridico 'procedimento', potrebbe far emergere alcuni nuovi principî a cui si ispira il legislatore canonico dopo aver pienamente privilegiato e accolto la rinnovata prospettiva ecclesiologica e personalistica su cui poi ha desiderato fondare un nuovo impianto istituzionale e normativo della Chiesa post-conciliare.

## 2. Diffidenza verso il formalismo

Prendere in considerazione e analizzare la portata metagiuridica o quella connessa con la riflessione filosofica del termine 'procedimento', o meglio, 'il giusto procedimento', impone innanzitutto il distanziarsi dal presupposto di origine illuministica secondo il quale solo i procedimenti e gli altri percorsi ordinamentalmente

[1] Cfr. Ioannes Paulus PP. II, Constitutio Apostolica *Sacræ disciplinæ leges,* 25 ianuarii 1983, AAS LXXV (1983), Pars II, p. XIII.

standardizzati sono del tutto neutrali da ogni forma di soggettivismo dovendo infatti assicurare imparzialità, assenza di arbitrio e troppo ampia discrezionalità da parte degli operatori di diritto, a tutti i livelli, nella sua applicazione. In realtà, in questo caso occorre prendere le distanze da un certo mito, anche se non del tutto tramontato, secondo il quale, la corretta attuazione dei meccanismi ordinamentali di indole pragmatica (quasi geometrica), pur presenti all'interno del dettato normativo, offra risultati pienamente condivisibili e soprattutto, certi. L'idea di un diritto che funzioni automaticamente cioè mediante una semplice combinazione di regole, assomiglia ad una logica concepita come matematica generalizzata tramite la quale, il suo promotore G.W. Leibniz, voleva ridurre la complessità dell'universo ad un calcolo. Adottando questa ipotesi in un ambito prettamente giuridico, sarebbe stato possibile ridurre il ragionamento ad un semplice calcolo (da qui nasce il celeberrimo *calculemus*).[2] Questa dimensione, anche se molto interessante, si pone in massimo contrasto con gli ordinamenti giuridici a più alto livello di formalizzazione procedimentale, poiché la semplice esposizione dei singoli percorsi da compiere, sebbene ufficializzati e sufficientemente precisi, non riesce ad assicurare l'obbligatoria appropriatezza di *tutte* le considerazioni, valutazioni e attività di discernimento che l'operato concreto sempre implica e comporta da parte di coloro che lo realizzano.

Questo medesimo fenomeno è ben avvertibile anche nell'ordinamento canonico la cui caratteristica, tra l'altro, gravita in realtà attorno al ruolo sostanzialmente ausiliario della quasi totalità delle norme-regole, anche quelle prettamente giuridiche. Un esempio pregnante su quanto asserito si rinviene nella teoria dell'atto posto *contra legem*, cioè un atto realizzato espressamente contro la legge stessa o il diritto come tale, che opera contro il disposto normativo o i suoi stessi fondamenti assiologici (costituzionali).[3] A livello delle conseguenze e degli effetti di tale atto, va sottolineato tuttavia che non tutti detti atti sono definitivamente e automaticamente invalidi; solo gli atti di maggior importanza spirituale — come per l'appunto i sacramenti — sono protetti già al proprio sorgere contro della superficialità e/o dagli abusi tramite un'intrinseca sanzione di nullità, diversamente caratterizzata, però, in riferimento all'atto stesso o al soggetto che lo ha realizzato. Solo in questi casi, l'invalidità e l'inesistenza generano inefficacia *ex tunc*. In alcune ipotesi invece, la validità dell'atto nullo non

[2] Cfr. U. Pagallo, *Introduzione alla filosofia digitale. Da Leibniz a Chaitin*, Torino 2005, Giappichelli Ed. p. 45.

[3] Cfr. E. Corecco, *Valore dell'atto "contra legem"*, "Ius Canonicum" 15 (1975) 30, pp. 248–250.

è messa in discussione, sebbene la mancata contestazione dell'efficacia di tali atti/comportamenti/condotte li configura come ottenuti senza l'intenzione di intaccare le loro dinamiche formali.[4]

Da quanto fin qui esposto, derivano alcune osservazioni rilevanti: in primis, va considerato che, all'interno dell'ordinamento canonico, lo spazio normativo legato alle questioni essenzialmente formali è molto limitato (secondo le ipotesi previste esplicitamente dal legislatore), sia che si tratti dei procedimenti legati all'esercizio ordinario del governo ecclesiale, sia a quelli inerenti al controllo di legittimità operato da superiori gerarchici rispetto agli atti posti da autorità inferiori. Rileva ulteriormente che l'esempio appena riportato documenta un altissimo livello di essenzialità dell'ordinamento canonico che, difatti, è la sua caratteristica strutturale.[5] Secondo chi scrive, l'essenzialità e l'essenziale in ambito giuridico vengono ad identificarsi non con le mere formalità di stampo quasi matematico, piuttosto con la sostanziale congruità e adeguatezza (anche procedimentale) nel senso profondo di corrispondenza alla realtà oggettiva di cui si sta trattando (*v. infra*). Ne consegue che le norme sostanziali previste per un determinato settore legale (come ad esempio per il matrimonio) sono solitamente 'aperte', ovvero si presentano con profili indeterminati, poiché gli stessi fatti giuridici possono essere suscettibili di formule giuridiche diverse, senza che ciò pregiudichi la composizione e l'articolazione di un unico iter procedimentale adatto al caso concreto. Sembra condivisibile l'opinione che gli operatori di diritto (specie i giudici) godano di libertà nel dare ai fatti la configurazione giuridica più adeguata, motivando al contempo le loro ragioni e salvando sempre la corretta applicazione delle norme sul caso.

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[4] Cfr. E. Baura, *Il Sistema delle invalidità (inesistenza e nullità, annullabilità e rescindibilità) dell'atto giuridico*, in: Aa. Vv., *L'atto giuridico nel diritto canonico*, Città del Vaticano 2002, Libreria Editrice Vaticana, p. 125 e seguenti; P. Gherri, *Introduzione al diritto amministrativo canonico. Metodo*, Milano 2018, Giuffrè Ed., pp. 107–109.

[5] Cfr. Ioannes Paulus PP. II, Allocutio *a Summo Pontifice in aula supra porticum vaticanæ Basilicæ habita, ad novum Codicem Iuris Canonici, paucis ante diebus promulgatum, publice exhibendum*, AAS LXXV (1983), Pars I, p. 461, n. 8; J. Llobell, *La diaconia funzionale della potestà giudiziaria della Segnatura Apostolica con gli altri organismi della Curia Romana: l'ecclesialità dei principi processuali, il Contenzioso amministrativo e le competenze giudiziali nei confronti della Segnatura Apostolica,* Coll. *Studi giuridici,* n. LXXXIX, Città del Vaticano 2010, Libreria Editrice Vaticana, p. 158.

## 3. Acquisizioni normative derivanti dall'insegnamento conciliare

La rinnovata concezione della Chiesa, ma soprattutto del diritto e — al loro interno — del rapporto tra Popolo di Dio e governo ecclesiale, è assolutamente decisiva in prospettiva di ciò che riguarda il valore fondativo del Concilio Vaticano II. Considerando questo orizzonte ecclesiologico accolto dal legislatore canonico, qui preme segnalare che l'attenzione al procedimento può essere considerata come una delle più significative acquisizioni del Codice latino nel quale, pur privilegiando la sostanzialità dell'attività giuridica, il legislatore ha dovuto superare una troppo ampia discrezionalità di governo, che finiva molto spesso per abusare del proprio 'potere' da parte dei superiori. Questa situazione sorgeva da fattori oggettivamente legati, per un verso, ad una peculiare visione della potestà annessa all'ufficio ecclesiastico (intesa difatti come potere[6] o dominio di indole privato[7]), radicata nel vissuto ecclesiale vigente sotto il regime del Codice piano-benedettino e, per altro verso, alla possibilità di giudicare secondo l'agire potestativo *ratione peccati* o meglio *ex informata conscientia* (cfr. can. 2186–2194 CIC/1917).[8] Di conseguenza, autorità ecclesiali facilmente si arrogavano il diritto della responsabilità morale e diretta causando di fatto gravi danni soprattutto nell'ambito della dignità della persona (chierici e religiosi). Era del tutto evidente che, a fronte di una nuova ecclesiologia avviante il rinnovato diritto della/per la Chiesa, l'urgenza da concretarsi doveva riguardare le modalità di espletare le mansioni derivanti dall'ufficio poiché la prospettiva oggettivistica di trattare le controversie sorte tra le persone e l'autorità ecclesiale non solo influiva negativamente sulla vita delle persone stesse, ma soprattutto non prevedeva (perché difatti non necessitava) alcun controllo istituzionale. L'apporto e l'incidenza di questi fattori, col tempo, si è trasformata nell'idea di proporre un sistema di gestione della potestà di governo che avrebbe la forza di vincere detta mentalità, purtroppo prevalentemente privatistica. Fu, infatti, sotto l'influsso del magistero conciliare,

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[6] Cfr. O. Condorelli, *La recezione della tradizione nella codificazione latina. Il caso del potere dei vescovi*, in: E. Baura, N. Álvarez de las Asturias, T. Sol (eds.), *La codificazione e il diritto della Chiesa*, Milano 2017, Giuffrè Ed., pp. 121–168.

[7] Cfr. F. Panizzolo, *La potestà di governo nella vita consacrata*, Venezia 2009, Marcianum Press, p. 15 e seguenti.

[8] Cfr. P. Gherri, *L'autotutela amministrativa come supplemento di conoscenza: la Remonstratio canonica (can. 1732–1734 CIC),* "Apollinaris" 85 (2012), p. 68.

che a questo modo di pensare (in realtà, a-cattolico) si imposero i Principi revisori della nuova opera codiciale indirizzata non tanto alla tutela della posizione individuale di ogni *christifidelis* (celeberrimi 'diritti dei fedeli' di dubbia ispirazione ecclesiologica e discutibile fondatezza teologica)[9], ma principalmente all'elaborazione di un nuovo impianto normativo e istituzionale marcato da un nuovo stile di governo e da un'aggiornata gestione della potestà all'interno della Chiesa intesa come communio. Se per un verso, questa estrema novità non è stata neanche significativamente sviluppata a livello codiciale, per altro verso invece si è aperta comunque una via alternativa dal giudizio vero e proprio, capace di gestire vari rapporti conflittuali tra i fedeli. Una novità mai vista nella legislazione canonica consisteva infatti nella verifica istituzionale sia della correttezza sia dell'efficacia dell'attività giuridica ecclesiale. Nel primo caso si sarebbe trattato dell'operato dei fedeli specie in ipotesi di eventuali abusi; nel secondo invece la verifica avrebbe riguardato gli atti di governo posti dall'autorità ecclesiale inferiore. Il tutto in una nuova chiave amministrativa che, di principio, avrebbe potuto snellire la gestione della giustizia *in casu* non compromettendo tuttavia le garanzie di legalità, certezza e oggettivismo solitamente affermati dal legislatore in relazione all'ipotesi del processo giudiziale.

Mentre, a livello codiciale, la rinnovata prospettiva inerente sia l'elaborazione e la redazione costruttiva dell'atto di governo, sia la sua verifica gerarchica, ha ottenuto una considerevole attenzione[10]; la novità di cui sopra ha permesso esclusivamente di percepire gli indirizzi sui quali poi il legislatore ha sviluppato veri e propri procedimenti, atti ad una reale e autentica protezione/tutela della vita ecclesiale. È probabile che lo stesso legislatore abbia dimostrato, in proposito, maggior interesse piuttosto che occuparsi dei cosiddetti diritti fondamentali dei fedeli, sebbene—sia chiaro—qui non si nega la loro esistenza all'interno della normativa vigente[11], ma non secondo le modalità con cui essi vengono definiti dalle dottrine giuridiche civilistiche; diritti, poiché ontologici, *ossibus*

[9] Cfr. P. Michowicz, *Ancora sul concetto di diritto soggettivo nell'ordinamento della Chiesa*, "Annales Canonici" 17 (2021) 2, pp. 91–92.

[10] Cfr. J. Canosa, *I principi e le fasi del procedimento amministrativo nel diritto canonico*, "Ius Ecclesiae" 18 (2006), p. 560 e seguenti.

[11] Basti citare il legislatore canonico il quale al can. 1400, §1 1° del CIC/1983 ha affermato: «Obiectm iudicii sunt personarum physicarum vel iuridicarum iura persequenda aut vindicanda vel facta iuridica declaranda».

*hærent*, che non possono uscire dall'ambito del privato/individuale come spazio indisponibile e precluso a chiunque altro[12], proponendosi difatti come vere e proprie spettanze inderogabili e rivendicatorie (se necessario), finendo per identificare la persona con i suoi diritti e la dignità dei stessi fedeli con il principio di legalità della rispettiva autorità.[13]

## 4. Verso un principio inespresso

Nella prospettiva appena abbozzata si colloca forse un ulteriore principio inerente il giusto procedimento che permette di attuarsi giuridicamente in ambito canonico, anche in assenza di specifiche norme positive (canoni o altre norme-regole), facendo riferimento ad una reale organicità dell'ordinamento in quanto giuridico e non solo legale. Di fatto, un esempio di atti posti *contra legem* e, specificatamente, la loro effettiva validità in alcune ipotesi (insieme alla sostanziale prescrizione della quasi totalità delle forme di illegittimità degli atti di governo), documenta la mancata risoluzione di queste problematiche legate soprattutto ad una concreta ed efficace applicazione del principio di legalità. Detta irrisolutezza dovrebbe essere affrontata in una prospettiva di coerenza coi rinnovati principî ecclesiologici e personalistici espressi dal magistero conciliare. Tuttavia, questo rimane ancora un postulato. Per altro verso, però, in dottrina non mancano gli entusiasti confermanti il carattere dominativo del principio di legalità su cui appoggiare l'operatività dell'intero ordinamento canonico. A noi risulta invece, che il vero principio che lo caratterizza, anima e ispira è quello del giusto procedimento.

In verità, andando oltre gli esempi di cui sopra, ma per supportare la proposta fin qui avanzata, va ricordato che, in ambito prettamente processuale si parla, di cosiddetto *due process*, in cui ciò che è rilevante e conta non sono le formalità/solennità processuali, piuttosto la sostanziale adeguatezza delle pronunce finali che, per definizione, devono essere conformi sostanzialmente alla parte dispositiva.[14] L'adeguato modo di procedere è quindi un vero

[12] Cfr. G. Pino, *Il puzzle dei diritti indisponibili*, "Diritto & Questioni Pubbliche" 22 (2022), pp. 119–135.

[13] Cfr. S. Romano, *L'Ordinamento giuridico*, 2 ed., Firenze 1945, Quodlibet Ed., p. 55 e 157.

[14] Cfr. T.E. Molloy, *The Theological Foundation of Ecclesiastical Due Process*, "CLSA Proceedings "41 (1979), p. 67.

principio informante l'intero ordinamento giuridico della Chiesa[15], poiché nella realizzazione della propria attività occorre osservare quanto è correttamente necessario ed indispensabile purché si possa parlare di un atto del tutto efficace.

A tale proposito, per poter accogliere una prospettiva così definita, si segnalano inoltre alcune ragioni favorevoli a quanto appena sinteticamente esposto. La sostanziale corrispondenza concernente l'oggetto della decisione definitiva (o giudiziale o quella che sia), non è solo la prassi espressamente richiesta dal legislatore canonico. La ricerca in merito documenta infatti come i tribunali supremi degli Stati preunitari italiani, tra i secoli XVI e XVIII, erano dotati di autorità giuridicamente vincolante.[16] Nello specifico, il Sacro Regio Consiglio stabiliva il vincolo attraverso l'emanazione della doppia sentenza conforme o tramite le cosiddette *binæ iudicaturæ*.[17] Il medesimo fenomeno fu anche riavvistato presso gli uffici della Curia Romana in cui vigeva una prassi secondo la quale furono emanate le decisioni definitive (di primo grado o quelle di appello) contenenti uguali valutazioni *in facto*. Pertanto, secondo la logica della conformità, qualora ci sia identità dei fatti a sostegno dell'azione, non è necessario esigere identità del *nomen iuris*, per cui due decisioni possono essere conformi, pur non essendo identico il *nomen iuris* attribuito ai fatti che fondano tale decisione. La giurisprudenza costante poi, nello specifico, nelle

[15] A suo tempo, Z. Grocholewski affermava: «come principale difetto ritengo una mancata sensibilità nella Chiesa nell'osservare una corretta procedura nell'emanazione degli atti amministrativi singolari (…) A tale riguardo va osservato che le procedure prescritte dal Codice per l'emanazione degli atti amministrativi singolari sono davvero semplici. Capita che l'Autorità ecclesiastica nell'emanare un atto amministrativo singolare adoperi una procedura molto più abbondante e complicata che quella prevista dalla legge, ma ometta ciò che è necessario», *Il sistema dei ricorsi e la giurisdizione dei tribunali amministrativi*, in: J. Canosa (ed.), *I principi per la revisione del Codice di diritto canonico. La ricezione giuridica del Concilio*, Milano 2000, Giuffrè Ed., pp. 486–487.

[16] In realtà, tale vincolo, pur operante allo stesso livello dei tribunali supremi, costituiva un vero e proprio precedente, molto ben prima che sorgesse, perlomeno in maniera formale, in Inghilterra. Cfr. A.C. Grola, *'precedente giudiziale'* in: Enciclopedia giuridica, vol. XXIII, Roma 1990, Giuffrè Ed., pp. 4–5.

[17] Cfr. V. Vladár, *Stylus Romanæ curiæ ako inšpiračny zdroj v histórii a dnes*, in: P. Salák jr., L. Mrázková (eds.), *Ius honorarium — rímské magistratury a jejich činnost*, Brno 2019, Scientia Ed., p. 100; M.N. Miletti, *Stylus iudicandi. Le raccolte di 'decisiones' del Regno di Napoli in età moderna*, Napoli 1998, Jovene Ed., pp. 195–215.

cause di nullità matrimoniale, si è attenuta all'identità *reale* e non solo formale dei capi di nullità.[18]

Spostiamo ora l'attenzione dalla conformità dispositiva delle pronunce giudiziali ad un ulteriore ragionamento a favore dell'articolazione di un giusto procedimento inteso come principio ispiratore del diritto post-conciliare. Va indubbiamente riconosciuto che quasi la totalità della costruzione e poi articolazione concreta dei procedimenti è subordinata alla vasta creatività, e non invece alla prassi rigidamente curiale e ormai consolidata, che propone dei relativi iter da compiere, elaborati per poter rispondere alle esigenze giuridiche accadenti con maggior frequenza ed intensità. In definitiva, il vero problema non è impedire ai superiori gerarchici di essere creativi, specie laddove questa condotta potrebbe far aggiungere alle bozze di percorso già delineate un qualche dettaglio importante; piuttosto è capire quanta creatività possa essere tollerata e resa ammissibile entro gli oggettivi confini comunicati dal legislatore. In linea di massima, il *Concilium dixit* è stato riconosciuto il luogo ermeneutico per la corretta lettura ed interpretazione del diritto in vigore ovvero, ciò su cui far reggere un impianto procedimentale deve essere condizionato da presupposti etico-istituzionali, non sempre dichiarati, sebbene ben visibili nell'evoluzione costante del diritto (cfr. can. 6 CIC/1917).

## 5. Conclusione

Il fondamento di un ulteriore principio informante l'intero ordinamento canonico va innanzitutto ricercato nell'esplicitazione della tradizione canonica ed in essa originariamente rinvenibile. Il giusto procedimento come principio è capace di giustificare una pluralità di regole a non abbisogna di alcuna giustificazione. Di certo, è soggetto ad una serie di eccezioni implicite che possono rendersi manifeste in occasione della sua applicazione. Sembra inoltre difficile servirsi di tale principio in ordine alla soluzione immediata di una controversia senza una previa specificazione o concretizzazione fattuale, ciò nonostante nulla cambia quanto alla sua capacità di veicolare dei valori giuridici comunemente condivisibili ai quali, poi, si conformano tutte le altre norme dell'ordinamento stesso. Queste sono solo alcune delle proprietà pregnanti del fenomeno sopra

[18] Cfr. J.J. García Failde, *Nuevo derecho procesal canónico*, 3 ed., Salamanca 1993, Universidad Pontificia de Salamanca Ed. pp. 30–31.

descritto che probabilmente avvalorano, dette caratteristiche, una argomentazione qui proposta secondo la quale la disposizione 'il giusto procedimento' sia un principio vero e proprio con tutte le conseguenze ordinamentali di tale assunzione.

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# Kant and Schopenhauer on the Ultimate Goal of Human Life

## Abstract

Contemporary reflection concerning man focuses upon man as a being living only "here and now", it is "short-termed" in character. In this paper, going against the current of this dominant tendency, I would like to show how interesting and important is the question about the ultimate goal of human life. In my considerations I refer to the thought of Immanuel Kant and Arthur Schopenhauer—two classical authors of modern philosophy—who still seem to exert a significant influence on the European culture. Even if in their systems they depart from similar assumptions, their conclusions concerning man are radically different: for Kant, every human being has unique value and is called to create "civil society"; for Schopenhauer every individual being (including man) is volatile and devoid of meaning and value.

The question remains open as to whether the ultimate message of their philosophy can be still an inspiration for us today, or whether it already sounds rather strange and unfamiliar in confrontation with the spirit of modernity.

## Keywords

goal of human life, I. Kant, A. Schopenhauer

We would venture to say that one of the features characterizing a man living in the contemporary culture is "short-term" thinking. For example, as remarks Patrick J. Deneen, liberalism reduces time to the present moment.[1] Most analyses concerning man focuses upon a being who lives only "here and now"; thus they are "soft"[2] in character and escape from categories applied in classical philosophy, such as substantial being, immutable nature, categorical obligation; in this context, the question of the final goal of human existence becomes an utterly abstract matter. In the present paper, going against the current of this dominant tendency, I would like to demonstrate, how interesting and important this ultimate question is. Human beings who take no interest in the final meaning of their lives[3] somehow lose an important part of their own essence. The manner in which this question is answered may, on the other hand, strongly influence clinching many matters constituting their everyday functioning.

In this light, I make use of the thought of Immanuel Kant and Arthur Schopenhauer[4] who are two classical authors of the modern philosophy who still seem to have a significant influence on the European culture, even if the final message of their philosophy may sound already rather strange and foreign for contemporary men. What is interesting about them is that departing from similar premises they arrive at radically different conceptions of man, their vision of ultimate goal of human life being the best exemplification of this chasm.

Certainly what Kant and Schopenhauer agree upon is that reflection on the final destiny of man entails necessity of confronting the question of evil. The whole human life is a drama, in which evil—however we would define it — plays an important role. Man seems to be called to cope with this situation and somehow sorting it. He cannot avoid this vocation, since his greatest desire is to live in a reality to which evil has no access.

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[1] P. J. Deneen, *Why Liberalism Failed*, Yale University Press 2018, p. 75.

[2] An interesting opposition of thinking in terms of a "strong" and a "soft" subject may be found for instance in the book of P. Druchliński, R. Moń, A. Kobyliński, E. Podrez, *Etyka a problem podmiotu*, Wydawnictwo Naukowe Ignatianum, Kraków 2023.

[3] In this article I do not distinguish between the „ultimate goal" and the „meaning" of human life.

[4] I compare the thought of Kant and Schopenhauer more widely in my book *Kant i Schopenhauer. Między racjonalnością a nicością,* Wydawnictwo Naukowe WSP, Rzeszów 1996, cf. Also: A. Bobko, *Non Multa. Schopenhauers Philosophie des Leidens,* Konigshausen & Neumann, Würzburg 2001.

Building his philosophical system, at a certain point, Kant faces the situation of splitting his universe into two disjunctive worlds: nature and the world of freedom. Persisting in this situation collides undoubtedly with the idea of universal rationality. Kant expressed his conviction that there must be a perspective in which these two worlds collide[5]. His consideration of the problem of finality of nature, and of the question of the ultimate goal of human life in particular, may be seen as an attempt to concretize this conviction. It is the vision of reality delineated by Kant, in which universal respect of rational laws leads to elimination of the destructive force of evil, that seems to be the domain where freedom realizes its goals in nature.

In all philosophical analyses Schopenhauer shows that the world is will and representation to the forefront poses the truth that suffering is the most positive and the most durable element of reality. The question about the final goal opens a perspective in which suffering may be overcome.

It should also be noted that the parts of both above-mentioned philosophical systems pertaining to ultimate goal and to the possibility of eliminating evil from the world are of a somewhat different character than their other elements. The style of philosophizing here is less rigorous, theses seem to be formulated "in conditional mood". It is especially visible in the case of Kant. As a matter of fact, in the third part of *Religion within the limits of reason alone* (bearing the significant title *The Victory of the Good over the Evil Principle, and the Founding of a Kingdom of God on Earth*), and particularly in his essay on *Perpetual Peace* Kant expresses his dreams—not inconsistent with prior theses, and yet dreams—about a universe that would be utterly rational. In Schopenhauer, in turn, the idea of negating will and withdrawing from life is consequence of his conviction that we never come to significant truths by means of rational cognition, but rather by means of intuitive insight, artistic creation or contemplation. That which is really precious may be acquired only through art and genius. Hence comes also liberation from life, and by the same token from suffering.

After these introductory remarks we may begin our interpretation of how Kant and Schopenhauer delineate their visions of the ultimate destiny of man.

[5] I. Kant, *Critique of Judgement,* transl. by Werner S. Pluchar, Hackett Publishing Company, Indianapolis-Cambridge 1987, p. 15.

## 1. Kant—a vision of civil society

Kant's practical philosophy shows unequivocally that man's task, as a rational being (a person susceptible of assuming moral obligations), is selfless perpetuation of good. This goal can be accomplished through self-perfection, through more and more complete subordination of one's own spontaneity to the moral law, that is creation of "good will". It turns out, however, that this process of co-creating morality, or rationality in the world of freedom does not come off without a hitch. On the contrary, in this process there always arises some destructive factor, disintegrating the emerging order. Kant ultimately refers to it as a penchant for evil and constates that, together with a predisposition to good, it is deeply rooted in human nature. Consequently, he writes: "To become morally good it is not enough merely to allow the seed of goodness implanted in our species to develop without hindrance; there is also present in us an active and opposing cause of evil to be combatted."[6] Destiny of individuals, as well as of humanity as a whole, may be interpreted as a battle of good with evil. Yet man, as the adversary gets to contend with remains to a great extent unknown, which does not permit it to be unequivocally identified. Hence, we detect a certain helplessness of man in this struggle, as well as paradoxical situations, in which apparently "good tree" bears evil fruits. Is therefore a vision of moral (rational) order realizable at all?

Kant radicalizes these doubts, stating: "Men (as was noted above) mutually corrupt one another's moral predispositions; despite the good will of each individual, yet, because they lack a principle which unites them, they recede, through their dissensions, from the common goal of goodness and, just as though they were instruments of evil, expose one another to the risk of falling once again under the sovereignty of the evil principle."[7] From the point of view of Kant's ethics—ethics based on intentions and not on consequences of actions, for which man's good will is the most precious—it is an unusual statement, even a bizarre one: man acting out of good will would be an "instrument of evil". This sentence is, as a matter of fact, a confession that morality alone is helpless

[6] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 50.

[7] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 88.

in the face of evil. Maintaining balance between spontaneity of will and moral duty, that is, maintaining rationality in the world of freedom demands support.

The statement quoted above contains, at the same time a clue suggesting where one can look for a solution of this factual situation—men need some kind of "a principle which unites them", a principle that would allow them to engage in the common struggle with evil. Eliminating evil ceases to be the task of individuals and becomes a matter of community, that is, of the whole of humanity.

In his essay *Idea for a universal history from a cosmopolitan point of view* Kant writes: "In man (…) those natural capacities which are directed to the use of his reason are to be fully developed only in the race, not in the individual."[8] The full use of reason, and, by the same token, constituting rationality to its full extent will be possible only when the subject charged with this task becomes humanity as a whole. It is only then that the possibility of the ultimate overcoming of evil appears: "The sovereignty of the good principle is attainable, so far as men can work toward it, only through the establishment and spread of a society in accordance with, and for the sake of, the laws of virtue, a society whose task and duty it is rationally to impress these laws in all their scope upon the entire human race."[9] From the helplessness in the face of evil there emerges, so to say, a new duty. It is, as Kant explains, "a duty which is sui generis, not of men toward men, but of the human race toward itself. For the species of rational beings is objectively, in the idea of reason, destined for a social goal, namely, the promotion of the highest as a social good."[10] The good which is free from the threat of evil can be only a common good, that is, a good created by people and maintained by their concordant effort.

Concretely, however, in what should acting towards a common good consist of? Is not speaking about some ideal consentaneous community a sheer uttering of spells that are supposed to overcome something which is maybe not possible?

Contrary to appearances, Kant is not a dreamer, but a realist. He is aware of the fact that common life of men in society is full of inner tensions: "Envy, the lust for power, greed, and the malignant inclinations bound up with these, besiege [man's] nature, contented within itself, as soon as he is among men. And

[8] I. Kant, *Idea for a universal history from a cosmopolitan point of view*, transl. by Lewis White Beck, in: idem, *On history,* The Bobbs-Merrill Co., Indianapolis 1963, p. 13.

[9] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 86.

[10] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 89.

it is not even necessary to assume that these are men sunk in evil and examples to lead him astray; it suffices that they are at hand, that they surround him, and that they are men, for them mutually to corrupt each other's predispositions and make one another evil."[11] Such a severe assessment of man's ability to live in society seems to stand downright in opposition to what has been said previously about the role of community in creating good. But there is no contradiction here, for, as Kant states, "the means employed by Nature to bring about the development of all the capacities of men is their antagonism in society, so far as this is, in the end, the cause of a lawful order among men."[12] Creation of a community does not automatically remove the causes that made the realization of full good by individuals impossible. We may even say that its creation generates a space in which man's bad inclination may reveal themselves even more intensely. Yet, here, Kant perceives a source of positive power. Natural "tensions" are supposed to lead to a state of balance—a state, in which all local incongruences will be regulated by universal, arranging law.

In order for the community to be able—in spite of its inner tensions and centrifugal forces blowing it apart from within—to keep its cohesion and to act towards development of moral order, some kind of bond ("uniting principle") is necessary that originates from outside the community itself. According to Kant, the duty of creating community demands an external support, an impulse or at least a crutch that would be a constant point of reference. He writes: "We can already foresee that this duty will require the presupposition of another idea, namely, that of a higher moral Being through whose universal dispensation the forces of separate individuals, insufficient in themselves, are united for a common end."[13] Kant claims therefore that the community encompassing the whole of humanity and acting on behalf of good must be religious in character. It is a further concretisation of the conviction that morality itself is not capable of opposing evil. The victory over evil is the act of God—"morality leads inevitably to religion".[14] Creation of ethical community is conceivable only if we

[11] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 85.

[12] I. Kant, *Idea for a universal history from a cosmopolitan point of view*, transl. by Lewis White Beck, in: idem, *On history,* The Bobbs-Merrill Co., Indianapolis 1963, p. 15.

[13] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 89.

[14] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 7.

assume the existence of God as its creator and lawgiver, because its establishment surpasses, according to Kant, human possibilities. "To found a moral people of God is therefore a task whose consummation can be looked for not from men but only from God Himself."[15]

In Kant's definition "religion is (…) the recognition of all duties as divine commands."[16] Therefore morality constitutes the very core of religion; the only way of worshipping God is the fulfillment of moral duties. Religion, without changing anything in the form of moral precepts, endows morality with a new character. Teaching that God is the giver of moral principles inscribed in human mind, it imparts to them, so to say, some kind of "physical" power that opens the perspective of eliminating evil from the world. The real source of this power is God himself. It is he who is the actual builder of his Kingdom on earth, that is, of the society where there reigns an everlasting peace, and eventual conflicts are solved by rational laws. Yet the duty and effort of laborious coming closer to such an ideal has been imposed upon man. Man—adoring God, or living according to the precepts of duty—is the only way to its realization: "[Man must] proceed as though everything depended upon him; only on this condition does he dare to hope that higher wisdom will grant the completion of his well-intentioned endeavors."[17]

Hence membership in the religious community does not deprive man of his distinctiveness and autonomy. The only imperative that obliges him to action remains his intrinsic moral imperative. Thanks to this conception Kant identifies the idea of the Kingdom of God on earth, presented in *Religion within the limits of reason alone*, with the idea of civil society. "The greatest problem for the human race, to the solution of which Nature drives man, is the achievement of a universal civic society which administers law among men."[18]

At this point, it is worth mentioning that the idea of civil society, taken to a great extent from Kant and so popular in today's political culture, is understood in total, often consciously intended, separation from the "religious context",

[15] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 92.

[16] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 142.

[17] I. Kant, *Religion within the limits of reason alone,* transl. by Theodore M. Greene, Hoyt H. Hudson, Harper & Row, New York 1960, p. 92.

[18] I. Kant, *Idea for a universal history from a cosmopolitan point of view*, transl. by Lewis White Beck, in: idem, *On history,* The Bobbs-Merrill Co., Indianapolis 1963, p. 16.

so vividly present in Kant. It leads undoubtedly to an undue simplification or even falsification of Kant's conception, for "civil society" and "the Kingdom of God on earth" are two complementary ideas. As aptly remarks O. Höffe, political considerations and considerations on philosophy of religion do not contain, as is customary today, concurring models, but quite on the contrary—models that are complementary.[19]

What is the most important, however, is that the vision of global human society governed by rational laws and living in eternal peace embodies Kant's ideas and dreams of man (humanity) who implements a wholly rational universe. This vision is only a hypothesis; it is not possible to prove whether its realization is possible. It does not, however, contradict any element of Kant's system—quite on the contrary, it completes it in its own way.

## 2. Schopenhauer—negating of the will to live

In Schopenhauer's philosophical conception the will to live desires constant self-presentation, strives constantly for new confirmations of one's self, and it finds them in its representations; whereas the confirmation of will is all the more complete when the degree of autonomy (individuation) is higher, accomplished by the manifestation in which it comes into effect. Rational cognition, being as a matter of fact itself a product of will, seizes its particular, singular manifestations, endowing them with an ordered structure of the world of representations. Rationality does not penetrate into the nature of will, it only creates its "superficial" image. It is an image in which the will is seen through the prism of the particular and individual, and each individuum pretends to be the unique, real expression of will. The process of manifestation of will, leading to emergence of more and more subtle individua, has, however, a certain side effect. As J. Garewicz writes, "when individuality reaches its peak, when man turns out to be a genius, (…) then opens a possibility of negating the will to live."[20] In the first part of his system Schopenhauer speaks about the confirmation of will. Hence when is its negation, supposed to come into effect through a man-genius?

[19] O. Höffe, *Immanuel Kant,* transl. by Marshall Farrier, State University of New York Press, Albany 1992, p. 194.

[20] J. Garewicz, *Schopenhauer,* Wiedza Powszechna, Warszawa 1998, p. 91.

The natural situation of man is the condition in which he remains under the constant "pressure" of the will to live. Man is the manifestation of will, and therefore he naturally desires his own person to be the unique and genuine reflection of the whole truth about the will to live. An expression of such an attitude is egoism. Schopenhauer wants to demonstrate that it is possible to overcome this state of things.

The first impulse engendering the thought about autonomizing oneself and freeing oneself from the will to live comes from art. "Aesthetic pleasure in the beautiful", writes Schopenhauer, "consists, to a large extent, in the fact that, when we enter the state of pure contemplation, we are raised for the moment above all willing, above all desires and cares; we are, so to speak, rid of ourselves. We are no longer the individual (…), but the eternal subject of knowing purified of the will."[21] Art opens us to the world of ideas—universal, eternal and immutable representations of the will. To be able to see this world, we have to discard that what is individual in us. Correlations of the universal representation must be a general, universal object of cognition. Aesthetic experiences show that it is possible; contemplation of the beautiful liberates from the pression of will that creates individuum of our person. It is, however, a very volatile liberation: the "will is silenced [only] for a few moments."[22]

Art offers us only a foretaste of the real independence from the will to live. At the same time it indicates that the path leading to it is surpassing one's individuality. The next impulse that allows us to progress on this way and contains our natural egoistic inclinations is triggered in the experience of suffering. Suffering is omnipresent. Of course, it mostly touches ourselves, but it can also awaken in us compassion for suffering of others. The compassionate man, whom Schopenhauer refers to also as a just man, "perceives that the distinction between himself and others, which to the wicked man is so great a gulf, belongs only to a fleeting, deceptive phenomenon".[23] Compassion that constitutes the real essence of all love[24] bears the sense of bond with other suffering human beings.

[21] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 390.

[22] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 390.

[23] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 372.

[24] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 374.

This sense has its "metaphysical foundation"—we are all objectifications of one will to live. A just man does not yet recognise this real state of affairs, he only has a presentiment of it. That is why he does not liberate himself from his own desires, he does not give up confirmation of his own individuum. He just tries to avoid situations in which this confirmation would lead to increasing the suffering of others; he is even, to a certain extent, capable of restraining his own needs if this would contribute to ease the others' plight.

Artistic genius, the attitude of the just only "brushes against" that which Schopenhauer calls negation of the will. Negation of the will is an act in which "the will (…) turns away from life. (…) Man attains to the state of voluntary renunciation, resignation, true composure, and complete willingness."[25] How is something like that possible, seeing that man is product of will, and all his actions are only necessary expressions of the intelligible character?

About this apparent contradiction Schopenhauer writes that it is "only the repetition in the reflection of philosophy of this real contradiction that arises from the direct encroachment of the freedom of the will-in-itself, knowing no necessity, on the necessity of its phenomenon."[26] Freedom appertains only to the will, since only the will does not have any foundation. All manifestations of the will are subject to the principle of sufficient reason, that is, they necessarily follow whatever is their *ratio sufficiens.* The idea of negating the will introduces into this scheme something essentially new: man, irrespective of the whole twine of factors that determine him, seems to "appropriate" freedom of the will of which he is manifestation. Schopenhauer explains it as follows: "The key to the reconciliation of these contradictions lies in the fact that the state in which the character is withdrawn from the power of motives does not proceed directly from the will, but from a changed form of knowledge."[27] Knowledge, or cognition is what enables man to surpass his own character—"self-suppression of the will comes from knowledge."[28]

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[25] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 379.

[26] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I., p. 403.

[27] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 403.

[28] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I., p. 404.

It is not, however, a rational cognition that offers us insight into the world as representation. It is not even that knowledge that, basing on metaphysical experience, teaches us that the world is the will as well. Schopenhauer speaks here about a direct intuitive cognition, even a mystical one, in which man—or, more precisely, the very will present in him—comes to the knowledge of the thing in itself. It is a recognition of one will in multitude of its manifestations, a direct intuition of the truth that all individuation is only an illusion, a "shadow" cast by one and the same essence. It is such a cognition that leads to the radical transformation of man.

How may such a degree of cognition be attained? Is there any relation between this cognition and rational knowledge? What is the role that particular cognitive faculties play in it? We do not find precise answers to these question in Schopenhauer. Grasping totality, insight in the essence of will is a matter of genius, and this is something that can be neither learned nor even adequately described. On the other hand, Schopenhauer stresses that such a cognition is accessible only for those whose rational cognition has attained the highest degree of subtlety. Genius is thus some kind of "superstructure" founded upon intelligence; one of its preliminary conditions is supposed to be "the deliberation of the faculty of reason, enabling [man] to survey the whole of life independently of the impression of the present moment."[29] Schopenhauer claims even that "the last work of intelligence is to abolish willing, whose aims and ends it had hitherto served."[30] Hence it turns out that—in spite of its limitation—rational cognition (intelligence) plays a certain role in neutralizing the will to live.

Therefore, what is the fruit of this cognition, of the knowledge that we can rightly refer to as mystical one? According to Schopenhauer mystical cognition does not give to those who attained it the possibility of positive mastering the will to live, of channeling its boisterous spontaneity according to one's own ideas. It only delivers the *quieter* [*Qietiv*] of all and every willing[31], that is, a means of neutralizing all possible desires. The one who acknowledged that

[29] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I., p. 404.

[30] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. II, p. 610.

[31] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 379; see p. 404.

all individuals are unimportant "shadows" of the real essence of the world loses his interest in his own desires, evidently entangled in the domain of "shadows". This cognition therefore leads to negation of the will, to disconnecting from its current—as a result, "the will turns away from life."

The state of negating the will to live is best illustrated by the figure of an ascetic. In his work Schopenhauer recalls numerous legends on severe ascetic customs of monks, present in Christian tradition as well as in religions of the Far East. The body of an ascetic seems to be a mere objectification of the will. But in reality it constitutes its negation, because motives that are natural motor of bodily actions do not influence it any more. The ascetic "renounces (…) this inner nature, which appears in him and is expressed already by his body, and his action gives the lie to his phenomenon, and appears in open contradiction thereto."[32] The most spectacular act of negating the will to live is mastery of the sexual drive and living in chastity.

It is worth mentioning that Schopenhauer, who considers turning away from life as the peak of human capacities *tout court*, does not permit the thought of suicide. Suicide is not, according to him, a denial of the will, but "a phenomenon of the will's strong affirmation. For denial has its essential nature in the fact that the pleasures of life, and not its sorrows, are shunned. The suicide wills life, and is dissatisfied merely with the conditions on which it has come to him. Therefore, by no means does he give up the will-to-live, but merely life, since he destroys the individual phenomenon."[33]

What awaits man after crossing this highest threshold of initiation which is the negation of will to live? Schopenhauer responds: nothingness! "Denial, abolition, turning of the will are also abolition and disappearance of the world, of its mirror;"[34] it reveals itself to us as "a transition into empty nothingness."[35] Departing from our imagination, we are not able to create any positive image

[32] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I., p. 380.

[33] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 398. Separately on the subject of suicide he writes in *Parerga und Paralipomena,* in: *Sämtliche Werke,* Bd. IV, Suhrkamp, Frankfurt a. M 1986, pp. 361–368.

[34] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 410.

[35] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I., p. 409.

of what happens after the will is negated and denied. For its closest possible description may pass terms known from the writings of mystics: "ecstasy, rapture, illumination, union with God."[36] Yet mystical experiences in Schopenhauer's understanding (acts of denial of the will to live) do not entail anything positive (he does not mention any "contact with the Absolute"). Their result is utterly negative; yet they allow for detachment from the current of life, for attainment of the state to which the all-present suffering has no access. For where there are no desires and strivings the mechanism that generated suffering ceases to function. Detachment from the will to live is therefore the ultimate surmounting of evil, but at the same time a means of entering in total emptiness.

## 3. Conclusion

The message that is to be found in Kant and Schopenhauer on the final meaning of human life invites reflection. Firstly, it is striking that modern classical authors who laid the foundations of the contemporary pragmatic and disordered culture, developed their philosophy in an extremely systematic way. The horizon of their analyses concerning detailed epistemological questions were ultimate questions—and among them especially the question about the goal of human life. It is interesting to note that they answer this question in radically different ways. Their point of departure is somehow common—Schopenhauer considers himself to be a Kantian, and he holds the thinker from Königsberg to be the greatest genius of the European philosophy beside Plato. Yet at a certain point they parted ways, and their messages are so radically different that we may see in them two opposite poles of understanding man: for Kant every human being has a unique value and is called to create great things (ultimately to build the Kingdom of God on earth, that is, the rational universe of "civil society"); for Schopenhauer every individual being (including a man) is volatile and deprived of meaning, and failure to understand this only multiplies suffering (hence the striving for absolute nothingness). Attempting to consider these questions, we move somehow in spaces determined by possibilities presented in those visions. On the one hand, following Kant we can understand man as a social

[36] A. Schopenhauer, *The world as will and representation*, transl. by E. F. J. Payne, Dover Publications, New York 1969, vol. I, p. 410.

being, who, by making use of his reason, can endow his own existence and the existence of the whole humanity with ultimate validity. On the other hand, Schopenhauer inspires to think in terms close to the contemporary "culture of singles"—man is condemned to loneliness, his life is on the road to nowhere. At this point contemporary culture proposes to enjoy life in the spirit of consumerism and hedonism, and Schopenhauer encourages empathy for the suffering and extinguishing the will to live which is tormenting us.

It is also interesting that both thinkers consider the problem of the final goal of human life without any reference to the problem of happiness. Throughout centuries—both in the Greek and in the Christian tradition—it is happiness that was the category coming to the fore in the context of the question of meaning of life, and philosophy was supposed to answer the question how to live in order to realize that goal. It seems that also today, if one would like to return to the question of the ultimate goal and purpose of life, it is happiness that would be the first association that comes to mind. Yet, for Kant human rationality sets man more important tasks, whereas according to Schopenhauer's pessimistic philosophy happiness is utterly beyond man's reach.

These considerations prompt another closing remark. Taking up the issue of the final goal of human life seems to be an essential preliminary condition of discussing more down-to-earth, mundane and everyday matters. Without such a perspective and distance we become entangled in unending disputes, most often without any meaningful conclusions. Such a state of affairs characterises majority of contemporary discussions, especially those led in the public sphere. Perhaps by reopening ourselves to final matters we would get the opportunity to cool down the temperature of today's interim misunderstandings.

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# Defining Work Ethics in the Modern Labour Market: Ethical Competence Criteria Emerging from Technological Development and Moral-Theological Documents

## Abstract

Ethical competence is not an easily defined concept, especially with respect to the job requirements resulting from new technologies and digital transformation of the economy. The present paper attempts to define the competence profile of a worker in knowledge-based economy and workplaces using automation and digital technologies, but in relation to sources from encyclicals and other moral-theological documents. This profile

includes specific ethical criteria, which are relevant and valid regardless of the times. Moreover, in the face of technological progress in modern economies, these criteria seem to have the power to influence the effectiveness of work processes. Thus, features such as respect for human dignity, responsibility, honesty, quality, courage, trustworthiness, justice, and secrecy should be considered as key for recruitment and evaluation of human capital in the modern labour market. As these are values mentioned in moral-theological documents, including papal encyclicals, they refer to the essence of human work and ensure that no man is reified.

**Keywords**

ethical competence, work, competence profile, dignity, encyclicals, automation, AI

## 1. Introduction

In everyday life, we all want to meet "ethical" people, and we all want to be seen as "ethical" persons. In the job environment, we often hear about *work ethics* as something motivating and positively influencing employee performance.[1] Thus, *ethics* is regarded only with positive values. People trust professionals who are ethical, as well as professions and workplaces associated with ethos and ethics. Ethics is, by its nature, human-oriented. Thus, development of new technologies and transformation into the so-called "digital economy" raise questions about the role of humans in contemporary and future work processes. Inspiration to take up this topic is the role of human dignity in the process of economic development, currently associated with automation and AI. These issues have been discussed by numerous researchers with respect to the impact on societies (e.g. ethical impact theory)[2], and raised in the encyclical document *Laborem Exercens* by John Paul II. The latter, despite having been published in 1981, appears to be more pertinent now than ever before.

[1] S. Listiani, P. Lumbanraja, P. Daulay, *The influence of work ethos, work environment and work motivation on the performance*, "Jurnal Riset Bisnis dan Manajemen" (2022) Vol. 15, No. 2, pp. 109–116.

[2] H. Khogali, S. Mekid, *The blended future of automation and AI: Examining some long-term societal and ethical impact features*, "Technology in Society" (2023) Vol. 73, pp. 1–12.

The teaching of John Paul II and of other popes help to organise, and even redefine, the criteria for assessing competences in the context of the requirements of the modern labour market, characterised by trends such as increasing automation, use of AI and popularity of remote (digital) work. Worldwide technology development is commonly accepted as good and necessary.

On the other hand, an increasingly prevalent phenomenon called automation anxiety[3], or the fear of automation (which also embraces the fear of AI[4]), shows that employees are worried about the future of their workplaces, while employers think about the competencies an employee should have to cope with these challenges. This phenomenon is also referred to as automation-related job insecurity, an opposition to automation-related performance optimism; both are associated with perceived automatability, in pessimistic or optimistic way, respectively. These attitudes are expected to have effects on overall job engagement, although in a diverse way.[5] This in turn may have strong impact on the whole society, therefore it is necessary to establish widely accepted ethical control systems.[6]

The ongoing digitization leads to a decreasing demand for some work performed so far by humans, especially based on average skills that are increasingly implemented by computers, robots and other digital technologies.[7] Recent declines in the share of labour in the national income and the ratio of the number of employees to the population in countries such as the US confirm claims that digital technologies, robotics and artificial intelligence permeate production processes in many countries. Additionally, the increasing automation contributes to lowering the production costs in which human work

[3] A. Goffey, Au*tomation Anxieties and infrastructural technologies*, "New Formations" (2019) No 98, pp. 29–47.

[4] Ch. Montag, J. Kraus, M. Baumann, D. Rozgonjuk, *The propensity to trust in (automated) technology mediates the links between technology self-efficacy and fear and acceptance of artificial intelligence*, Computers in Human Behavior Reports (2023), Vol. 11, pp. 1–7.

[5] A. F. Godollei, J. W. Beck, *Insecure or optimistic? Employees' diverging appraisals of automation, and consequences for job attitudes*, "Computers in Human Behavior Reports" (2023), Vol. 12, pp. 1–15.

[6] H. O. Khogali, S. Mekid, *The blended future of automation and AI: Examining some long-term societal and ethical impact features*, "Technology in Society" (2023), Vol. 73, pp. 1–12.

[7] E. Brynjolfsson, A. McAfee, *The second machine age: work, progress, and prosperity in a time of brilliant technologies*, New York—London 2014, W.W. Norton & Company.

is applied, at the same time increasing the number of new, more complex job tasks.[8]

In order to increase efficiency of modern management systems, it is necessary to develop new ways of work and cooperation of the human factor at different levels of value creation chains of various sectors and enterprises. It requires identification of new areas in management and quality sciences, emerging at the "fuzzy" junction of human activity and technology. However, such a combination always produces ethical dilemmas. It is therefore essential to pay attention to the ethical competence of an employee, who acts in a network of distributed agents managing different business processes. We postulate that ethical competence has the power to increase efficiency of employee cooperation in value creation chains in the modern economy and labour market. In the present study, the authors review contemporary competence frameworks with relation to the presence of ethics, compare them with excerpts of papal encyclicals and other documents, and finally, come up with the list of ethical competence criteria which should be considered in the modern labour market.

## 2. The space for ethics in employee competence models

Perhaps the most frequently used model of competence categorization is hard-skill versus soft-skill ones, in which hard competencies include specific technical skills, while soft competencies relate to different aspects of personality.[9] The EU authorities recognised the importance of proper understanding and valuing of skills and qualifications, in order to match the needs of the labour market. For this purpose, the European Qualifications Framework for lifelong learning (EQF) was set up in 2008 to improve the transparency, compatibility and portability of people's qualifications, and it was revised in 2017 to adapt to challenges of the current and future economy.[10] However, it does not refer

[8] D. Acemoglu, P. Restrepo, *The race between machine and man: implications of technology for growth, factor shares and employment*, "American Economic Review" (2018), Vol. 108, No. 6, pp. 1488–1542.

[9] A.F. Hendarman, U. Cantner, *Soft skills, hard skills, and individual innovativeness*, "Eurasian Business Review" (2018) Vol. 8, No. 2, pp. 139–169.

[10] The European Parliament and the Council, *Council recommendation of 22 may 2017 on the European Qualifications Framework for lifelong learning and repealing the recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the*

to ethical issues, a fact which has been noted by Guillen *et al*. and titled "the great forgotten issue".[11] Although the first attempt to formulate the EQF listed ethical qualifications (competences) next to cognitive (knowledge), functional (skills) and personal ones (attitudes and behaviours), it did not specify what they include and how they can be measured.[12] Moreover, Guillen *et al.*[13] demonstrated the gradual disappearance of ethics from the EQF. They observed that the EQF initially started with *ethical competences* as an independent category but ended with incorporating *ethical issues* as an aspect of a broader group called *professional and vocational competence*. In this perspective, ethics is no longer regarded as a separate competence category. Even worse, the latest EQF has no reference to ethics whatsoever, whereas many authors stress that ethical competence is distinctive enough to deserve its own conceptualization and measurement.[14]

There are many references and definitions of ethical competence in the literature. It was part of the holistic model of professional competence developed in the 1990's by Cheetham and Chivers, which consisted of five dimensions of employee abilities: i) cognitive competence (knowledge of theories and concepts), ii) functional competencies (skills and know-how), iii) personal competency (behavioural competencies, knowledge on how to behave), iv) meta-competencies (the ability to cope with uncertainty and learning), and v) ethical competencies. The latter was defined as "the possession of appropriate personal and professional values and the ability to make sound judgements based upon these in work-related situations".[15] Practical ethics and moral maturity were also mentioned in the German educational framework, which has long been

*European Qualifications Framework for lifelong learning*, Brussels 2017, https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32017H0615(01) (15.09.2023).

[11] M. Guillén, J. Fontrodona, A. Rodríguez-Sedano, *The Great Forgotten Issue: Vindicating Ethics in the European Qualifications Framework (EQF)*, "Journal of Business Ethics" (2007) Vol. 74, No. 4, pp. 409–423.

[12] European Commission, *Towards a European qualifications framework for lifelong learning*, Brussels 2005, https://www.voced.edu.au/content/ngv%3A30220 (15.09.2023).

[13] M. Guillén, J. Fontrodona, A. Rodríguez-Sedano, *The Great Forgotten Issue: Vindicating Ethics in the European Qualifications Framework (EQF)*, "Journal of Business Ethics" (2007) Vol. 74, No. 4, pp. 409–423.

[14] A. Schrijver de, J. Maesschalck, *A new definition and conceptualization of ethical competence*, in: D. Menzel, T. Cooper (eds.), *Achieving ethical competence for public service leadership*, New York 2013, Routledge, pp. 29–51.

[15] G. Cheetham, G. Chivers, *Towards a Holistic Model of Professional Competence*, "Journal of European Industrial Training" (1996) Vol. 20, No. 5, pp. 20–30.

viewed as a model for the European system.[16] According to Jormsri *et al.*[17] ethical competence is "the ability or capacity of persons to recognize their feelings as they influence what is good or bad in particular situations, and then to reflect on these feelings, to make their decision, and to act in ways that bring about the highest level of benefit". In short, it is defined as seeking for knowledge and action that defines right and wrong behaviour, and subsequently, an ethically competent persons are those who distinguish between right and wrong and act accordingly.[18]

In the literature, there have been several attempts to specify the criteria of ethical competence. Furmanek[19] pointed out that the core of the moral experience of every human is *responsibility*. Responsibility means understanding the consequences of an action, performing tasks and duties as best one can, and being courageous but mindful at the same time. Besides, the ability to accept responsibility demonstrates the moral maturity of a person. He further lists other moral virtues, such as prudence, temperance, justice and fortitude (called ancient virtues and being mentioned by Plato), as well as more contemporary values including internal discipline, tolerance, socialisation and honesty. An example of operationalization of ethical competence has been provided by Rest[20] in his Four-Component Model. It consists of moral awareness or sensitivity, moral judgement or reasoning, moral intention and moral behaviour. Kavathatzopoulos *et al.*[21] developed and tested a tool called Ethical Competence Questionnaire for Persons and Organizations (ECQ-PO), aiming to measure the degree of ethical competence of employees and organisational processes. It was based on the subjective judgement by employees on how they feel and understand the presence or absence of particular parameters of ethical competence.

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[16] J. Winterton, F. Delamare-Le Deist, E. Stringfellow, *Typology of knowledge, skills and competences: clarification of the concept and prototype*, Luxembourg 2006, Office for Official Publications of the European Communities.

[17] P. Jormsri, W. Kunaviktikul, S. Ketefian, A. Chaowalit, *Moral competence in nursing practice*, "Nursing Ethics" (2005) Vol. 12, No. 6, pp. 582–594.

[18] D.C. Menzel, *Ethics Moments in Government: Cases and Controversies,* Abington—New York 2010, Routledge.

[19] W. Furmanek, *Ethical dimensions of the modern approach to human work*, "Labor et Educatio" (2013) No. 1, pp. 45–59.

[20] J.R. Rest, *Moral Development: Advance in Research and Theory*, New York 1986, Praeger.

[21] I. Kavathatzopoulos, G. Rigas, *A Measurement Model for Ethical Competence in Business*, "Journal of Business Ethics Education" (2006), No. 3, pp. 55–74.

It should be added that each profession may have its specific set of ethical criteria. A large number of recent studies on ethical competence of staff focuses on healthcare and social services. From among ten core competencies for nurses, three of them have been identified as of moral nature, specifically: commitment, thoroughness and compassion.[22] In economic and business context, ethics (or: business ethics, which is used synonymously in economic settings) is a frequently explored theme with respect to corporate values[23] and often linked with corporate social responsibility.[24] Primarily, many debates on business ethics referred to the financial sector, to fight against corruption, prevent white-collar crime and ensure consumer protection. In turn, marketing ethics focuses on honesty, fairness, and product quality.[25]

## 3. Inspiration from encyclicals in developing model of ethical competence with respect to challenges of modern labour market

With no doubt, papal encyclicals and other moral-theological documents constitute a rich source of information on ethical aspects in labour and socio-economic relations. In particular, *Laborem Exercens* by John Paul II relates directly to work ethics, and therefore to ethical competence. However, references to various ethical aspects in the context of economy can be found in other documents, too. In combination with the review of literature, the authors attempted to build a list of ethical competence criteria which are key for the contemporary labour market. As its major challenges include the increasing use of automation, AI and remote work, the ethical competence has to take into account these three important contexts. Thus, our conceptual framework consists of eight groups

[22] S.K. Sporrong, B. Arnetz, M.G. Hansson, P. Westerholm, A.T. Höglund, *Developing Ethical Competence in Health Care Organizations*, "Nursing Ethics" (2007) Vol. 14, No. 6, pp. 825–837.

[23] G. Orme, C. Ashton, *Ethics—a foundation competency*, "Industrial and Commercial Training" (2003) Vol. 35, No. 5, pp. 184–190.

[24] Ch.A. Sarfo, J.A. Zhang, P. O'Kane, N. Podgorodnichenko, K.K. Osei-Fosu, *Perceived corporate social responsibility and employee ethical behaviour: do employee commitment and co worker ethicality matter?*, "Journal of Management and Organization" (2002) Vol. 28, No. 1, pp. 184–201.

[25] Ch. Enz, D. Skodova Parmová, P. Wolf, *Importance of ethical competence for the sales management of small and medium-sized financial sales organisations*, "DETUROPE—The Central European Journal of Tourism and Regional Development" (2021) Vol. 13, No. 1, pp. 121–152.

of ethical criteria, namely: *respect for dignity*, *responsibility*, *honesty*, *quality*, *courage*, *trustworthiness*, *justice*, and *secrecy*. The framework is summarised in tab. 1 and discussed below.

**Tab**. 1. Ethical competence criteria with respect to challenges of modern economy with reference to encyclicals and other moral-theological documents

| Ethical competence criteria | Main challenges of modern economy | | | Reference in encyclicals and other documents |
|---|---|---|---|---|
| | Automation of work | Use of AI in work processes | Digital (remote) work | |
| Dignity (respect for dignity) | Awareness of the optimal point for robotization of work processes so as not to violate the dignity of human being | Engage the AI only where there is no risk of violating the dignity of another human being | Showing respect for other people despite physical distance | Paul VI, *Dignitatis humanae*, 1965<br>Congregation for the Doctrine of the Faith, *Dignitas personae*, 2008<br>John Paul II, *LE* 6<br>John Paul II, *SRS* 41 |
| Responsibility | Respecting and optimising the monetary value of work as a source of employee income | Tendency to engage AI tools only in those situations which do not impose risk to one's life and wellbeing | Strong consideration of the client's perspective, ensure respect for other employees in work processes | John Paul II, *LE* 17<br>John Paul II, *SRS* 15 |
| Honesty (fairness) | Open and transparent presentation of the advantages as well as the disadvantages of the planned solutions | Clear information about the use of AI, e.g. bots instead of humans, wherever the recipients may be unaware of it | Conscientious performance of duties without feigning work, no idleness or workplace resistance (so called "empty labour") | John Paul II, *VS* 98–99 |
| Quality | Taking care about the quality of products and services, but not forced by the customer who pays for the product, but by the owner, manager and employees of automated production processes | Taking care about the constant monitoring of the AI | Maximising the value added of your own work (contribution to common value) that is transferred to coworkers, customers, etc. | John Paul II, *LE* 5<br>John Paul II, *SRS* 34 |

| Ethical competence criteria | Main challenges of modern economy | | | Reference in encyclicals and other documents |
|---|---|---|---|---|
| | Automation of work | Use of AI in work processes | Digital (remote) work | |
| Courage | Readiness to stop further automation of work processes in case of predominance of its negative social effects (even if it involves higher costs) | Readiness to withdraw from AI if there is a risk of negative effects, even if it involves higher costs | Readiness to bear witness to the truth, even when it is inconvenient (e.g. admitting a mistake) | John XXIII, *ADS* 3 John Paul II, *SRS* 38 |
| Trustworthiness | Taking care to maximise the degree of automation reliability | Taking care to maximise the degree of AI reliability | Self-motivation, work commitment and dependability | John Paul II, *CA* 27 |
| Justice | Taking care about the equity in sharing the benefits of automating work processes | Taking care about the equity in sharing the benefits of AI | Fair treatment of subordinates and coworkers | John Paul II, *LE* 2 John Paul II, *SRS* 33 |
| Secrecy (confidentiality) | Secrecy, e.g. for technological solutions, confidentiality, non-disclosure of data on the technology | Secrecy, e.g. for algorithmic solutions, confidentiality, non-disclosure of data on the AI technology, protection of user-data | Taking care of the coworkers' personal data, not distributing personal (especially sensitive) information, avoiding gossip, etc. | John Paul II, 1991, Address of to the Plenary Assembly of the Pontifical Commission for Social Communication |

Source: own data

## Respect for dignity

Dignity is central in ethics, and its status as a criterion in the ethical competence model should be supreme. Some sources define dignity as the principal value, "the value of all values"[26], or essentially equate dignity with ethics itself, indicating that it is the foundation for all ethical factors and should be prioritised even over freedom, responsibility and solidarity.[27] Human dignity is discussed numerous

[26] W. Furmanek, *Ethical dimensions of the modern approach to human work*, "Labor et Educatio" (2013) No. 1, pp. 45–59.

[27] A. Autiero, *Human Dignity is an Ethical Sense: Basic Considerations*, "Interdisciplinary Journal for Religion and Transformation in Contemporary Society" (2020) No. 6, pp. 9–21.

times in moral-theological documents, including *Dignitatis Humanae*[28], *Dignitas personae*[29] and the above mentioned papal encyclicals *Laborem Exercens*[30] and *Sollicitudo Rei Socialis*[31]. In the current model, however, the term *dignity* is used not as much as a primary value, but as a competence criterion pertaining to the *respect for human dignity*. In the context of the modern economy, the dignity of employees should be taken into account in decision-making on automation of work processes. The optimal level of automation is one in which there is a balance between marginal social benefits, without lowering human dignity below the level that is socially considered dignified. In this sense, the criterion of *respect for human dignity* indicates the willingness to engage the AI tools only where there is no risk of violating the dignity of another human being. As the increasing use of AI is motivated by considerations of higher performance and profits, *human dignity* was recognized by international law and became a legal constraint. In this respect, dignity is perceived not only as a moral idea, but also as a principle of law.[32] As such, it requires assessment of the compliance of the AI systems with fundamental human rights.[33] As a key moral value mentioned in all papal encyclicals referring to work, dignity points to the essence of human work and ensures that no man is reified. Thus, any competence profile should assume *a priori*, at the very beginning, the dignity of employees and of the customers.

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[28] Paul VI, *Declaration on religious freedom Dignitatis Humanae on the right of the person and of communities to social and civil freedom in matters religious promulgated by His Holiness Pope Paul VI*, Vatican 1965, https://www.vatican.va/archive/hist_councils/ii_vatican_council/documents/vat-ii_decl_19651207_dignitatis-humanae_en.html (15.09.2023).

[29] Congregation for the Doctrine of the Faith, *Instruction Dignitas personae of certain bioethical questions*, Vatican 2008, https://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20081208_dignitas-personae_en.html (15.09.2023).

[30] John Paul II, *Laborem Exercens*, 6, Vatican 1981, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_14091981_laborem-exercens.html (15.09.2023).

[31] John Paul II, *Sollicitudo Rei Socialis*, 41, Vatican 1987, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_30121987_sollicitudo-rei-socialis.html (15.09.2023).

[32] H. Harris, *Human Dignity and Business Ethics*, in: D. Poff, A. Michalos (eds.) Encyclopedia of Business and Professional Ethics, Springer Link 2017, https://link.springer.com/referenceworkentry/10.1007/978-3-319-23514-1_177-1 (28.06.2023).

[33] G. Le Moli, *AI vs Human Dignity: When Human Underperformance is Legally Required*, "Revue Européenne du Droit" (2022) Vol. 4, No. 1, pp. 105-109.

## Responsibility

In the encyclical *Laborem Exercens* human work is linked not only with dignity, but also with responsibility. The issue of responsibility is raised with respect to employer-employee relation and ethically correct labour policy[34], as well as with respect to intellectuals, scientists and "those who bear the burden of grave responsibility for decisions that will have a vast impact on society."[35] Responsibility is also mentioned in *Sollicitudo Rei Socialis* in the context of international relations between rich and poor countries.[36] Responsibility means respecting and optimising the monetary value of work as a source of employee income. When limiting human participation in work processes, employees' income should not be reduced below the socially acceptable level. In addition, it is necessary to ensure continuous opportunities for human resource development so that people can adapt their competences to the current needs of the labour market. Similarly, the responsible use of AI should indicate one's tendency to engage AI tools only in those situations which do not impose risk to one's life and wellbeing. For example, producers and users of intelligent medical devices should first consider safety. Whereas there are medical centres that start using medical robots without any experience or authorization from the manufacturer or distributor, imposing a huge risk to the patients' life.[37] Similarly, responsibility in the use of self-driving vehicles indicates prioritising human health safety over possible profits,[38] and in case of an accident taking on the blame and liability.[39] In other words, man has to have ultimate control over any machine and its results, not the opposite.[40]

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[34] John Paul II, *Laborem Exercens*, 17, Vatican 1981.

[35] John Paul II, *Laborem Exercens*, 9, Vatican 1981.

[36] John Paul II, *Sollicitudo Rei Socialis*, 15, Vatican 1987.

[37] J. Styczyński, *Unauthorised robotic systems pose a huge risk to patients*, (2023), https://www.rynekzdrowia.pl/Nauka/Nieautoryzowane-systemy-robotyczne-powoduja-olbrzymie-ryzyko-dla-pacjentow,246724,9.html (28.06.2023).

[38] E. Cheng, *Self-driving car companies' first step to making money isn't robotaxis*, (2022), https://www.cnbc.com/2022/06/02/self-driving-car-companies-first-step-to-making-money-isnt-robotaxis.html (28.06.2023).

[39] C. McCormack, *Who's at fault when an autonomous vehicle gets into a collision?*, (2022), https://driving.ca/features/insurance/whos-at-fault-when-an-autonomous-vehicle-gets-into-a-collision (28.06.2023).

[40] M. Rybak, *Personal ethics and organisational ethics in the light of the teaching of John Paul II*, "Rynek Pracy", (2005) No. 7, pp. 73–100.

### Honesty (fairness)

In theological documents, honesty is always associated with truth and openness. The encyclical devoted to truth, *Veritatis Splendor*, clearly indicates the need for honesty and openness in social, economic and political contexts. It says: "The Supreme Good and the moral good meet in truth: the truth of God, the Creator and Redeemer, and the truth of man, created and redeemed by him. Only upon this truth is it possible to construct a renewed society and to solve the complex and weighty problems affecting it (…)."[41] Honesty in automation refers to truthful and transparent presentation of the advantages as well as the disadvantages of the planned solutions and their consequences. Honesty (being fair) implies readiness to provide clear information that AI is involved in a process or service. It is particularly important in the situations when recipients may not realise that they are being served by a robot. For instance, telemarketing robots ("bots") are able to interact with customers in a very natural way, responding to their inquiries and providing accurate information. In recent years, the Competition and Consumer Protection Office in Poland receives plenty of complaints against companies that communicate with customers using chatbots.[42] However, the problem with "robocalls" is not just the naive customers, who are unaware that there is no living person on the other side; the major threat is that use of chatbots may lead to unauthorised use of personal data and even fraud.[43] According to the Directive 2002/65/EC[44] people should be informed about the use of automated calling systems without participation of the interlocutor. However, as it is difficult to fight legally with such

[41] John Paul II, *Veritatis Splendor*, 98–99, Vatican 1993, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_06081993_veritatis-splendor.html (15.09.2023).

[42] T. Jurczak, *UOKiK receives complaints about bots*, (2023), https://serwisy.gazetaprawna.pl/poradnik-konsumenta/artykuly/8658758,chatboty-voiceboty-uokik-boty-prawa-konsumenta.html (28.06.2023).

[43] S. Czubkowska, M. Szymaniak, *„Are you sure you're human? No". The plague of robocalls reaches Poland*, (2021), https://spidersweb.pl/plus/2021/09/automat-telemarketingowy-plaga-robocalls-czy-pani-na-pewno-jest-czlowiekiem (28.06.2023).

[44] The European Parliament and the Council, *Directive 2002/65/EC of the European Parliament and of the Council of 23 September 2002 concerning the distance marketing of consumer financial services and amending Council Directive 90/619/EEC and Directives 97/7/EC and 98/27/EC*, Brussels 2002, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32002L0065 (15.09.2023).

practices,[45] *honesty* still provides an important protective power against the potential misuses of this kind of technology.

## Quality

The quality of work and products appeared numerous times in the bible. For example, Paul's First Epistle to the Corinthians clearly indicates that "the fire will test the quality of each one's work" (1 Corinthians 3–13). The quality is mentioned in *Laborem Exercens* with reference to the technology, which facilitates human work and leads to an increase in the quantity and quality of products.[46] On the other hand, the encyclical *Sollicitudo Rei Socialis* pertains to "the consequences of a certain type of development on the quality of life in the industrialised zones."[47] Automated work processes require care for quality, but not forced by the customer who pays for the product, but by the owner, manager and employees of automated production processes of goods and services. Quality as an ethical competence means readiness to control and continuous monitoring of processes and results, so the recipients get what they expect and what they have been promised.

## Courage

John XIII in his encyclical *Aeterna Dei Sapientia* used the term "moral courage"[48], which clearly associates this virtue with ethics. Courage is therefore a very important feature of ethical competence. Unlike dignity, it is not regulated by law, yet it should reflect a personal characteristic of a contemporary worker: his or her willingness to bear the costs of resignation from automation and AI applications if there is a risk of negative effects to fundamental human rights and values, as they were listed above. The encyclical *Sollicitudo Rei Socialis* emphasises that courage is required to take a difficult path to overcome the evil, and "one must have the courage to set out on this path, and, where some

[45] M. Madejski, *„Don't insult me, I'm not a bot." This is what we hear when we talk… with the bot*, (2020), https://www.money.pl/gospodarka/niech-pan-mnie-nie-obraza-nie-jestem-botem-to-uslyszymy-gdy-rozmawiamy-z-botem-6559985630215008a.html (28.06.2023).

[46] John Paul II, *Laborem Exercens*, 5, Vatican 1981.

[47] John Paul II, *Sollicitudo Rei Socialis*, 34, Vatican 1987.

[48] John XXIII, *Aeterna Dei Sapientia*, 3, Vatican 1961, https://www.vatican.va/content/john-xxiii/en/encyclicals/documents/hf_j-xxiii_enc_11111961_aeterna-dei.html (15.09.2023).

steps have been taken or a part of the journey made, the courage to go on to the end."[49] As a competence, courage is key in remote work, where individual employees in different locations often do not know each other in person. Such workers should have the courage to openly communicate injustices and other inefficiencies and pathologies in work and collaboration processes.

### Trustworthiness

*Trustworthiness* was referenced by John Paul II in *Centesimus annus* as one of the basic virtues of economic life, alongside truthfulness and hard work.[50] The scope and level of automation, AI and digital work solutions should be adapted to the context of value creation, i.e. resources, conditions, sometimes disregarding potential technological possibilities. For example, for developers of AI applications, trustworthiness needs to be proven for its use in critical systems such as i.e. avionics, mobility, defence, healthcare or finance. From the competence perspective, trustworthiness always means taking care about reliability of automated processes and AI applications, even though it is used to generate seemingly harmless products such as media messages. In addition, in the field of digital work, it refers to self-motivation and dependability, which is particularly important for process efficiency.

### Justice

In broad understanding, *justice* is one of the fundamental values considered in guidelines for development of technological solutions, i.e.. automation, AI and digital work solutions. As an ethical competence criterion, it implies caring about the equity in sharing the benefits of them, as well as readiness in promoting fairness in any activity performed with the help of them. The reference to justice in modern world and contemporary workplaces has been made numerous times in *Laborem Exercens*[51], while *Sollicitudo Rei Socialis* points directly to the context of technological advancements: "True development, in keeping with the specific needs of the human being-man or woman, child, adult or old

[49] John Paul II, *Sollicitudo Rei Socialis*, 38, Vatican 1987.

[50] John Paul II, *Centesimus annus*, 27, Vatican 1991, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_01051991_centesimus-annus.html (15.09.2023).

[51] John Paul II, *Laborem Exercens*, 2, Vatican 1981.

person- implies, especially for those who actively share in this process and are responsible for it, a lively awareness of the value of the rights of all and of each person. It likewise implies a lively awareness of the need to respect the right of every individual to the full use of the benefits offered by science and technology". Moreover, it further mentions that these rights should be implemented by i.a. "justice in employment relationships."[52] Referring to financial benefits from automation, justice means, apart from the return on particular capitals, also the redistribution necessary for the restoration and development of technical, human and other resources. Justice in digital work means the fair treatment of subordinates and co-workers.

## Secrecy

*Secrecy* (*confidentiality*) is an important ethical criterion valued not only in relation to AI, but also in the whole labour market. The entrepreneurs are increasingly aware of the need to protect their intellectual property rights, financial data, private information of employees, etc. There are numerous legal measures to assure safety in these areas, such as Polish RODO.[53] Employees are asked to sign confidentiality agreements. However, ethical competence seems to be the guarantor in this process. From the automation, AI and digital work perspective, it involves the ability of a worker to keep confidentiality about technological or algorithmic solutions and any data which should not be disclosed to unauthorised persons. The value of secrecy at different levels was expressed by John Paul II in his *Address to the Plenary Assembly of the Pontifical Commission for Social Communication*. It referenced the right for privacy to protect the private life of families and individuals, but also "the right of secrecy" in professional duty: "Indeed, whenever public good is at stake, discretion and discernment and careful judgement should be used in the preparation of news."[54] The latter is of particular importance in the context of the use of AI in broadly understood communication processes.

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[52] John Paul II, *Sollicitudo Rei Socialis*, 33, Vatican 1987.

[53] The European Parliament and the Council, *Regulation 2016/679 of The European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data and repealing Directive 95/46/EC*, Brussels 2016, https://eur-lex.europa.eu/eli/reg/2016/679/oj (15.09.2023).

[54] John Paul II, *Address of John Paul II to the Plenary Assembly of the Pontifical Commission for Social Communication*, Vatican 1994.

## 4. Conclusion

Increasing automation and use of AI, as well as significant changes in the labour market require more research on an employee's competence profile in the face of these specific conditions, and with respect to ethical dimensions. This paper attempted to compare the ethical competence criteria, found across a variety of publications, with the teaching of papal encyclicals and with regard to the aforementioned challenges of the modern labour market. Obviously, the presented model touches on only the most important issues. It is not an easy task to define and measure the ethical capabilities of a person. It is difficult to even imagine modern assessment centres which focus on workers' moral predispositions or ethical maturity, although the employers would certainly declare that they want only "ethical persons" as their staff. Thus, despite being widely explored by academics, ethical competence seems to be underrated in contemporary employee assessments methods.

Further research should be carried out in this area to explore i.e. the relative importance of ethical competence criteria regarding job positions, branches and organisational cultures. The ethical competencies of a worker are not only a *modus vivendi*, but they provide a real "power" to fight with potential threats emerging from new technologies. There are also opinions that although the participation of human factors in work processes will decrease due to automation and AI, the value of human resources will increase as a result of their scarcity. Thus, in order to analyse the ethical profile of a worker, one needs to consider the dignity of humans in work processes. It stems directly from the encyclical documents of popes, especially of John Paul II and his encyclical *Laborem Exercens.* In this document, the Pope addressed the role of human factors in technological progress at a time when artificial intelligence was not yet a widely discussed topic. Pope Francis addresses this issue in the context of the modern era. In his messages, he has repeatedly cautioned against the unethical application of AI.[55]

[55] Reuters, *Pope warns against potential dangers of artificial intelligence*, 2023.

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# Challenges and Changes in Senior Social Care Services during the Pandemic Period

## Abstract

The subject of the research are 107 recipients of social services who have been provided residential services since the beginning of the pandemic, i.e. since March 2020. The pandemic situation has significantly affected the financing as well as the functioning of social services, their employees and individuals of residential services. This study is focused on identifying key aspects and factors that most influenced the quality of services provided and life satisfaction of seniors in context of analysing the change in lifestyle habits of seniors before and during the pandemic Covid-19.

## Keywords

senior social care, mental health, pandemic Covid-19

## 1. Introduction

The pandemic and related measures to control the spread of the virus led to significant changes in the living conditions of seniors, especially those who are recipients of social services with a residential form. This study provides a comprehensive view of the experiences of older individuals, with an emphasis on identifying areas that need additional support measures. This research is important not only from the point of view of understanding the individual experiences of seniors, but also with regard to the formation of policies and measures that will support their well-being and quality of life in similar extraordinary situations.

Aging is a natural and gradual process that affects the human organism and is accompanied by inevitable and involutional changes. These changes are partly responsible for the increased risk of developing health problems in the elderly population. The authors confirm that the phenomenon of an aging population requires pressure on social services, which have undergone a historical development from the concept of a passive recipient of social services to the support of a holistic approach, the activation of recipients of social services to the humanization of care in old age.[1] Phenomena from the biological, psychological and social fields intertwine, influence each other and together create an overall picture of the natural aging of a person. This process is an integral part of the life cycle and can be influenced by genetic, environmental and lifestyle factors. Likewise, genetic factors play a key role in predisposing to certain signs of aging, and genetic inheritance can influence how quickly and to what extent these signs appear. Environmental factors such as lifestyle, diet, exercise and exposure to external conditions can further influence the course of aging.[2]

Based on prognostic analyzes by Eurostat until 2050, the following important indicators were identified, which assume that the aging of the population will progress and will be associated with longevity. While it has been shown that the increase in the number of residents over the age of 60 will increase from 1.93 million to 3.67 million residents by 2050. Care for the

[1] L.L. Cintulová, S. Buzalová, *Sociálne služby v súčasnosti*, Bratislava 2022, Vysoká škola ZaSP sv. Alžbety.

[2] R. Čevela, Z. Kalvach, L. Čeledová, *Sociální gerontologie*, Praha 2012, Grada.

elderly is also influenced by other factors in the development of society, which include:[3]

- a high number of seniors who are involved in the labor market even over the age of 64;
- the reversal of value orientation in society and the absence of intergenerational relations between the younger and older generations;
- reluctance of young people to take care of elderly dependents and provide long-term care at home;
- increasing the longevity of seniors to 90 years with the trend of emerging diseases;
- increased incidence of cancer and other oncological and cancerous diseases in the elderly, which increases the pressure on health care;
- increased rate of poverty and risk of social exclusion of older persons over 65;
- higher dependence of adults on social services and long-term care, a shift in the age of entry into social services facilities, which correlates with the chronic condition and low quality of life of seniors.

## 2. Effects of the pandemic on seniors

Authors[4] reflected the effects of the pandemic in various areas of social functioning. Especially during the first wave of the pandemic, perceived personal stress increased and psychological problems among people related to the pandemic increased. Seniors have been identified as a vulnerable group not only in terms of mortality, but also at risk of financial anxiety and financial hardship due to the COVID-19 pandemic. Adults showed an increased level of experienced stress and depressive feelings during the second and third wave of the COVID-19 pandemic in Slovakia. The results showed that they experience the most stress and depressive feelings due to uncertainty, instability, mistrust of the state and low living standards. The increase in mistrust was linked to the emergence

[3] K. Bundzelová, L.L. Cintulová, S. Buzalová, *Sociálna práca s osobami vyššieho veku*, Bratislava 2023, Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety v Bratislave.

[4] L.L. Cintulová, L. Radková, Z. Budayová, *Mental health of Roma women in post-covid era*, "Acta Missiologica" (2022) 16 Nr 2, pp. 116–129.

of conspiracy beliefs related to the disease COVID-19, to which older generations were particularly susceptible.[5]

The coronavirus pandemic has often evoked a financial threat that is characterized by a combination of fear, anxiety and concern about one's personal financial situation. In the context of the COVID-19 pandemic, there is evidence that there is a link between financial threat and impaired mental and physical health.[6] The research conclusions of de Sun et al.[7] emphasize that during the pandemic it is important to pay attention not only to the physical but also to the financial well-being of individuals and to provide support in the area of managing financial worries and stress.

It was found that older adults tended to report lower increases in unhealthy eating habits, television screen use, tobacco use, alcohol use, and pain medication use compared to younger adults.[8] This also includes a lower increase in unhealthy lifestyle changes or drinking. One study suggested that most older adults maintained a balanced diet, limited alcohol intake, and got adequate sleep.[9] However, another study found no changes in alcohol use patterns.[10] Absent correlational analyses, trust in fake news and conspiracy theories was strongly associated with negative attitudes toward vaccination and lower levels of political liberalism. The study claimed that the COVID-19 pandemic does not only have a short-term effect on society, but its consequences will be present in the long

[5] L.L. Cintulová, P. Beňo, T. Pavlovičová, *Aspects of social services and well being in post covid era*, „Int J Health New Tech Soc Work" (2023) 18 Nr 3, pp. 106–114.

[6] L.L. Cintulová, Z. Budayová, I. Juhásová., *Health of Roma People living in marginalized Communities in Slovakia*, "Clinical Social Work and Health Intervention" (2023) 14 Nr 1, pp. 7–15.

[7] Z. Sun, B. Yang, R. Zhang, X. Cheng, *Influencing factors of understanding COVID-19 risks and coping behaviors among the elderly population*, „Int J Environ Res Public Health" (2020) 13 Nr 17, pp. 5889–5891.

[8] A. Constant, D.F. Conserve (eds,), *Socio-Cognitive Factors Associated With Lifestyle Changes in Response to the COVID-19 Epidemic in the General Population*: Results From a Cross-Sectional Study in France, „Front Psychol" (2020) 11, pp. 57960–57962.

[9] E. Younger, A. Smrke (eds,), *Health-related quality of life and experiences of sarcoma patients during the COVID-19 pandemic*, „Cancers Basel" (2020) 12 Nr 8, p. 2288.

[10] R. Stanton, et al., *Depression, anxiety and stress during COVID-19: Associations with changes in physical activity, sleep, tobacco and alcohol use in australian adults*, „Int J Environ Res Public Health" (2020) Nr 5, pp. 33–42.

term for all citizens, younger and older generations, with different intensity and different impacts.[11]

These findings contrasted with other research showing that some older adults increased binge drinking, drinking frequency, alcohol consumption and cigarette smoking during the first wave of the pandemic. Changes in eating habits were also noted, with some individuals eating more and more frequently.[12] There is also a study that reported higher consumption of unhealthy foods among older adults compared to participants of other age groups.[13]

It is important to note that food insecurity has increased among older adults during the pandemic, although to a lesser extent compared to younger adults. The recorded reduction in care could also have resulted in problems with hunger and the tendency to substance and non-substance addictions, which negatively determined the spread of Covid-19 and its measures.[14] In addition, physical activity was associated with higher resilience, positive affect, and lower depressive symptoms. Older adults were also reported to have less change in unhealthy exercise behaviors.[15]

We analysed how the pandemic changed the living habits of seniors in the following text. It is important to emphasize that challenges and changes in the lifestyle habits of seniors can be individual and influenced by many factors, including place of residence, social relationships, physical and mental health, and availability of resources. Senior habits changed more passive living, Changes in sleep patterns and increased fatigue, higher aggressiveness, nervousness, restlessness, higher consumption of unhealthy foods, routine diet, unbalanced diet and Low interest, limited possibilities of activities, change of system of activity in social service facility.

During the pandemic, various programs were also deployed with the aim of reducing social isolation through contact with family in the form of whats

[11] V. Čavojová, P. Hamala, *Prežívanie a dôsledky pandémie COVID-19 na Slovensku*: *Pohľad sociálnych vied*, Bratislava 2022, Centrum spoločenských a psychologických vied SAV.

[12] A. Heid, F. Cartwright (eds.), *Challenges Experienced by Older People During the Initial Months of the COVID-19 Pandemic*, „Gerontologist" (2021) 21 Nr 61, pp. 48–58.

[13] B. Whitehead, *COVID-19 as a Stressor: pandemic expectations, perceived stress, and negative affect in older adults*, „J Gerontol B Psychol Sci Soc Sci" (2021) 18 Nr 76, pp. 59–64.

[14] Z. Budayová, L.L. Cintulová, *Stigmatization and harm reduction of drug users in post-covid era*, „Acta Missiologica" (2023) 17 Nr 1, pp. 122–130.

[15] F. Vukadin, P. Tománek, *The importance of meaning in educational work with adult migrants*, „Clinical Social Work and Health Intervention" (2023) 14 Nr 2, pp. 59–65.

up calls, the transformation of an online program for the elderly population proved to be effective. Innovative programs should therefore be created to support vulnerable older adults and minimize long-term consequences and feelings of loneliness.[16]

Fear related to COVID-19 and uncertainty about the future have become pervasive psychological aspects affecting the elderly population during the pandemic. Seniors were forced to face a significant risk associated with the disease, and many of them experienced increased stress and anxiety about possible infection. This fear may have led to self-defense measures such as isolation from the outside world, which also negatively affected their psychological well-being.[17]

Depression, anxiety and other psychological consequences have become common responses to pandemic restrictions. Older individuals suffered from loneliness due to separation from family and friends, which may have triggered or exacerbated psychological problems. In addition, uncertainty about the future and health concerns may have contributed to a deterioration in mood and well-being. Immediate responses to such fear may include strict measures of self-isolation and avoidance of outdoor activities, which can have a negative impact on mental health.[18]

The financial consequences associated with a lower quality of life in the lower senior strata were also evident. Some older individuals have lost access to income or faced a worsening economic situation, causing financial concerns and a low ability to secure necessary care and nursing services or compensatory aids. These financial pressures led to additional psychological problems and challenges in old age.[19]

The long-term effects on older adults can be varied and affect different aspects of their lives. These long-term consequences include chronic stress, impaired sleep quality, increased risk of psychological disorders, and social isolation.

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[16] R. Cauda, Z. Ondrušová, P. Tománek, M. Hardy, *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" (2021) 12 Nr 3, pp. 6–8.

[17] L.L. Cintulová, P. Beňo, T. Pavlovičová, *Aspects of social services and wellbeing in postcovid era*, „Int J Health New Tech Soc Work" (2023) 18 Nr 3, pp. 106–114.

[18] L.L. Cintulová, L. Radková, Z. Budayová, *Mental health of Roma women in post-covid era*, "Acta Missiologica" (2022) 16 Nr 2, pp. 116–129.

[19] L.L. Cintulová, Z. Budayová, I. Juhásová, *Health of Roma People living in marginalized Communities in Slovakia*, "Clinical Social Work and Health Intervention" (2023) 14 Nr 1, pp. 7–15.

These factors can negatively affect older adults' overall quality of life and contribute to long-term health problems.[20]

## 3. Research

The main goal of the research was to examine and analyze changes in behavior, thinking, common routine activities and functioning in social service facilities in the period before and after the Covid-19 pandemic. The author's research efforts were aimed at comparing and identifying differences in these areas between the two time periods in order to better understand the impact of pandemic events on the lives of seniors and staff in these facilities.

The study was focused on identifying changes in behavioral patterns, mental settings, as well as adaptation to new conditions and challenges brought about by the pandemic. Our intention was to collect and evaluate data that would give us a deeper insight into significant differences and specific areas that have changed the most, whether in the form of living habits, seniors' satisfaction or the functioning of the facilities themselves. The results of the data collection will provide a detailed view of the development and dynamics in the environment of social services before and after the Covid-19 pandemic, which could serve as a valuable source of information for adapting and improving the services provided in the future.

Hypothesis 1:
There will be differences in the impact of the pandemic on the living habits of seniors in social service facilities based on demographic characteristics.

Hypothesis 2:
There will be differences between recipients in social service facility who will undergo significant changes in daily routines and overall lifestyle in the facility.

[20] K. Bundzelová, L.L. Cintulová, S. Buzalová, *Sociálna práca s osobami vyššieho veku*, Bratislava 2023, Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety v Bratislave.

## 4. Sample

We determined the research sample based on the research criteria, a total of 107 questionnaires were returned to us. 57% of women and 43% of men were involved in the analysis of the impact of the coronavirus pandemic on their lives in a social service facility. They determined the age composition of the respondents, which ranged from 60 years, which represented 24.3%. 23.4% of respondents were over 85 years old, with a similar composition of respondents aged 69–77 years.

24.30% of the respondents stated that they were placed in a social facility due to the deterioration of their health condition from a medical facility. 41.1% of seniors requested the provision of social services at the initiative of the family and 34.6% of seniors decided to go to the facility based on their own will.

## 5. Results

According to the statements of the recipients, the pandemic has most changed the internal functioning of the facility, the personnel composition, the way of organizing activities, the implementation of therapies, communication and the introduction of measures, which was confirmed by 24.3%. 18.0% of women and 30.4% of men said that the thinking and behavior of people who lived in greater fear, isolation, and closure had changed. 23.0% of women and 17.4% of men confirmed that their life habits have changed, they are more passive and show less interest in new things. 15.0% of seniors indicated a change in the area of communication, and 16.8% of them indicated changes in the way they spend their free time in the facility.

17.8% expressed that they were most afraid of losing the financial security and social support they had until then. 26.2% expressed fear that there will be no one to take care of them, they are not provided with sufficient care. 23.4% were afraid of the consequences in connection with the unavailability or poor availability of health care, deterioration of the health condition and even death. 14.0% of seniors felt more lonely, they were afraid of losing contact with their family, because they restricted themselves more, were less frequent. 18.7% of recipients stated that the pandemic had an impact on leisure activities, new activities, therapies and events were not being carried out in the facility, which had an impact on their increased level of isolation and routine, especially in the first wave of Covid-19.

**Table 1**. The changes in the social care facility during pandemic

| Changes during the pandemic in the facility | | | | |
|---|---|---|---|---|
| | | Gender | | Total |
| | | Women | Mem | |
| Thinking and behavior | Count | 11 | 14 | 25 |
| | % | 18,0% | 30,4% | 23,4% |
| Interal rules, activities, functions | Count | 14 | 12 | 26 |
| | % | 23,0% | 26,1% | 24,3% |
| Life habbits and attitudes | Count | 14 | 8 | 22 |
| | % | 23,0% | 17,4% | 20,6% |
| Communication, relationships | Count | 10 | 6 | 16 |
| | % | 16,4% | 13,0% | 15,0% |
| Free time activities and hobbies | Count | 12 | 6 | 18 |
| | % | 19,7% | 13,0% | 16,8% |
| Total | Count | 61 | 46 | 107 |
| | 100,0% | 100,0% | 100,0% | 100,0% |

In the research, we also investigated the extent of the impact of the pandemic measures on the internal functioning of the facility. 25.0% of seniors indicated a medium and 23.3% indicated a high degree of impact of Covid-19 on how employees and social service providers had to deal with the situation. 40.0% of seniors said that the pandemic had a low impact on people's thinking and behavior. 23.3% of recipients confirmed a change in lifestyle habits due to the onset of the pandemic at a high level. 18.8% of respondents stated that the pandemic had the least effect on mutual relations in the facility and methods of communication, if they do not count the wearing of masks. 30.0% of recipients indicated that free time was largely affected by various measures that were introduced in that period.

20.6% of respondents said that the pandemic affected not only the implementation of activities, but also the complex operation and management of the facility, which obeyed the semaphore in social services and crisis management. 32.3% of recipients considered the biggest negative impact to be social isolation, loss of stimuli and reduced opportunities for communication and contact with the surrounding world outside the facility. 16.8% of recipients confirmed that the pandemic had a negative impact not only on the social services themselves, but also on their personality, there was a deterioration in the health status

and psychological well-being of seniors. 23.1% feel a deterioration of mental and physical resistance and it definitely had an impact on their overall health. Health and social impacts were demonstrated in 20.5% of recipients, who were negatively affected by the pandemic on several levels.

## 6. Discussion

The research found that more than half of nursing home residents without cognitive impairment reported feeling lonely. A study in nursing homes using a loneliness scale reported that almost all seniors felt lonely: 25% of seniors had moderate feelings and 75% of seniors showed high levels of loneliness and frustration. The study presented the factors determining the disruption of social relationships and a low level of life satisfaction[21]:

- The unfulfilled need for a meaningful relationship and the loss of self-determination due to institutionalization play a key role in feelings of loneliness.
- Meaningful activities and actively spent free time in the facility can reduce loneliness.
- Interventions that have been found to successfully reduce loneliness are play therapy, doll therapy, horticultural therapy, and reminiscence therapy.
- The pandemic situation increased the level of feelings of loneliness, anxiety and negative feelings in the personal experience of seniors.

Feeling lonely has many harmful consequences. They include an increased risk of depression, alcoholism, suicidal thoughts, aggressive behavior, anxiety and impulsivity. Some studiea[22] have found that loneliness is also a risk factor for cognitive decline and progression of Alzheimer's disease, recurrent stroke, obesity, increased blood pressure, and mortality. Lonely older people may be burdened with more symptoms before death and may experience more intensive care at the end of life compared to people who are not lonely.

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[21] J. Simard, L. Volicer, *Loneliness and isolation in long-term care and the COVID-19 pandemic*, „J Am Med Dir Assoc" (2020) 21 Nr 7, pp. 966–967.

[22] E.J. Williamson (ed.), *Factors associated with COVID-19-related death using OpenSAFELY*, "Nature" (2020) 584 Nr 7821, pp. 430–436.

*Hypothesis 1: There will be differences in the impact of the pandemic on the living habits of seniors in social service facilities based on demographic characteristics. We accept hypothesis one, as the level of significance p=0.026 (df9) confirmed the differences in life habits between men and women in the facility.*

The research results tracked changes in 6 areas, one of which was the way of eating. Men and women showed different food preferences, access to food, food consumption and lifestyle. The seniors expressed that they would welcome greater variability in meals at the facility, more light meals and fruit. At the same time, it was confirmed that the pandemic contributed to higher creativity in the field of food, therapies oriented towards the development of culinary therapy were introduced. Within the group of seniors, there was a request for greater variability in diet, change of meals and more fruit. These requirements indicate an effort to diversify and enrich the food regime in the facility, with an emphasis on changing the menu and a preference for typical Slovak and sweet dishes (steamed buns, ducat buns, strudels).

An interesting finding is that the pandemic has led to greater creativity in the field of food. In response to the new challenges brought by the pandemic, therapies aimed at developing sensory, taste and manual skills in food preparation were introduced. These therapies are known as culinotherapy and focus not only on taste perception, but also on the manual skills associated with food preparation. Such an approach can contribute to the overall improvement of diet quality and support seniors in the development of various skills, thereby contributing to their overall mental and physical health.

The lifestyle habits of seniors represent an important aspect of their overall health and quality of life. These habits include a wide range of activities that affect the physical, mental and social dimensions of their lives. These life habits include not only dietary preferences and physical activity, but also the way of interacting in social relationships, mental stimulation and, of course, healthy interpersonal relationships.

Men showed a higher score in physical activities compared to women, who prefer physical physical activities to a lesser extent (p=0.015; df4). This finding suggests that men may have a greater interest in physical activity compared to women who appear to have a lower preference for these activities. It may also be related to other factors, such as state of health, age of the pensioner, orientation to sports activities in the past, willingness to cooperate and motivation for activities in the facility.

Life habits can also include social relationships. Differences in the way men and women interact can affect their overall lifestyle, which was also confirmed by the research results at a significance level of p=0.041 (df6). Maintaining an active social life can help prevent feelings of isolation and loneliness. Engaging in social activities, meeting friends and family, and building new social ties can have a positive impact on overall psychological well-being.

*Hypothesis 2: There will be differences between recipients in changes in daily routines and overall lifestyle in senior care facility. Based on the result of the significance level p=0.034 (df8) confirmed differences between men and women in lifestyle in the facility have been demonstrated specifically in the following areas:*

- 55% of women and 45% of men confirmed that their way of spending their free time has changed compared to the period before the pandemic. 66% agreed with the statement that operations and activities at the facility have never been on the same track as they were before the outbreak of the coronavirus.
- 43% of women and 57% of men answered that they have a different lifestyle in the facility, which is related to the change in the regime of the facility and the limited visits and outdoor activities that the facility has implemented.
- 71% of the respondents from the total sample said that a strongly routine life prevails in the facility, despite the staff's efforts to organize various activities.
- The routine way of life appears in men and women mainly in ordinary activities that are subject to the operating mode of the device (days for swimming, days for relaxation, cognitive training, exact time of serving food, reserved time for visits, similar activities in a month, planned trips to the same locations—Christmas markets, swimming pool, theater).
- 46% agreed with the statement that the pandemic has changed the way the facility operates, recipients felt the biggest impacts in the first wave and the least in the third wave of measures against Covid-19-seminar in social services.
- 38% of women and 29% of men said that they perceived the greatest restrictions in the area of contact with family, had fewer opportunities for social activities (11%) and interactions between other generations and people were limited to wearing veils (13%). They could not participate in regular group events where seniors could communicate and gain positive experiences (6%).

- 52% of women and 48% of men said they had limited social contacts and felt isolated. 49% agreed that they were able to use online tools to communicate with family members, which helped them get through a bad time. 61% said that the staff of the facility helped them communicate with their family via Whats up. On the other hand, 33% of seniors admitted that they do not have a large network of social contacts and are happy if someone remembers them. Since seniors could not receive visitors or family members were afraid of contact with seniors in order not to spread the disease between clients, despite online communication, they prefer personal contact, which can strengthen and please them more, which was confirmed by 67% of respondents.

## 7. Conclusion

The pandemic has led to significant changes in the adaptation of service recipients in these facilities, with the new conditions causing many challenges. There was increased pressure and demand on staff and clients, which was reflected in areas such as changes in daily routines, social interactions, physical activity and mental health. In the final analysis, social services must remain flexible, innovative and adaptable in order to respond effectively to changing needs and circumstances.

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# Social Competencies of Students of Science and Social Majors for Volunteer Work

## Abstract

The article discusses the recognition of social competencies of students of science and social majors to do voluntary work. The theoretical concept on which the research is based is the concept of social competencies by J. Skrzypczak, who sees them as "the ability to do something, depending on the familiarity of knowledge, skills and abilities included in it, as well as on the degree of conviction about the need of using that ability." The main purpose of the research is to diagnose the social competencies of students of science and social majors to do voluntary work and to identify the differences between groups in this respect. The method of diagnostic survey was chosen for the purposes of the study. Research has shown slight differences between the students of science and social majors. They only concern the assessment of one's own level of motivation to help.

## Keywords

voluntary work, social competences, students, social studies, sciences

## 1. Introduction

The issue of voluntary work is increasingly gaining importance, not only due to services which are offered to those who need them, but mostly because of the scope of values it covers. Voluntary work is a specific activity. It is more often perceived as a kind of place for character honing, a place of self-fulfilment, and an internship for future professional work.[1]

At the beginning, it should be noted that it is worth undertaking research in this field for several important reasons. Firstly, voluntary work in Poland in a relatively new phenomenon and, indicated in written sources, there is little research devoted to the issue of competencies required to perform the tasks of volunteers, especially students who undertake voluntary activities.

Secondly, although the *Act of 24 April 2003 on public benefit and volunteer work* regulates legal issues relating to voluntary work, it does not refer in any way to what qualifications and predispositions people undertaking voluntary work should have. This task is left to the bodies organising voluntary work. Although, good intentions are very important in the process of helping, they are not enough. Unless we know how to provide assistance, we can do more harm than good.

Thirdly, the conclusions drawn from the research could be used to help to encourage students to engage in this type of activity, how to modify higher education curricula to stimulate motivation to act for the benefit of others, and at the same time how to help in a competent manner. "Volunteers who work with people should learn constantly […] Everyone who wants to help effectively should become a professional in helping. Therefore, volunteers should be characterised by constant improvement of their knowledge. In this respect, it is also important to compare one's activities with the achievements of other people."[2]

Fourthly, the duty of every science is to strive to gather important knowledge about the field of reality that interests us.

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[1] E. Turska, *Znaczenie wolontariatu w opiniach studentów pedagogiki*, „Dyskursy Młodych Andragogów" 21 (2020), pp. 191–204.

[2] B. Kromolicka, *Wolontariusz w służbie człowiekowi umierającemu. Na przykładzie Szczecińskiego Hospicjum Domowego,* Szczecin 2000, wyd. Uniwersytetu Szczecińskiego.

## 2. Grounding in theoretical concepts

The theoretical concept that can be referred to in this research is the **concept of social competencies by J. Skrzypczak**, who treats them as "the ability to do something, depending both on the awareness of the knowledge, skills and abilities involved, as well as on the degree of belief in the need to use this ability." It is therefore about how to use one's own abilities in usinsg learned skills, supported by specific theoretical knowledge to effectively cope with the surrounding world in a selected area."[3]

## 3. Current state of knowledge

The question of competencies has been the subject of interest of social scientists relatively recently, only since the mid-1980s, when research on the social competencies of adults was conducted by E. Aronson, D. T. Wilson, R. M. Akert[ E. Aronson, T.D. Wilson, R. M. Akert.[4] Research on competencies is conducted on many levels, including: the area of professional work, social communication, self-perception. When discussing the issue of research on competences, it is impossible to ignore the research conducted by M. Argyle, the aim of which was individual differences in the level of social competences. The author included gender, social class and personality as factors differentiating social competences.[5]

Research aimed at determining the relationship between professional preferences and social competencies was conducted by A. Matczak[6] with high school and university students.

Research on the caring competencies of hospice volunteers was conducted by B. Kromolicka.[7] They focused on the stages of preparing volunteers to work

[3] J. Skrzypczak, *Tak zwane kompetencje kluczowe, ich charakter i potrzeba kształtowania w toku edukacji ustawicznej*, „Edukacja Ustawiczna Dorosłych" 3(1998), p. 20.

[4] E. Aronson, T.D. Wilson, R.M. Akert *Psychologia społeczna. Serce i umysł*, Poznań 1997, Wyd. Zysk, pp. 282–285.

[5] A. Argyle, *Zdolności społeczne*, in: S. Moscovici (ed.), *Psychologia społeczna w relacjach ja-inni,* Warszawa 1998, wyd. Szkolne i Pedagogiczne, pp. 77–102.

[6] A. Matczak, *Preferencje zawodowe młodzieży a kompetencje społeczne,* „Psychologia Wychowawcza", 38(1998) 4, pp. 107–115.

[7] B. Kromolicka, *Wolontariusz w służbie człowiekowi umierającemu. Na przykładzie Szczecińskiego Hospicjum Domowego*, Szczecin 2000, wyd. Uniwersytetu Szczecińskiego.

with the sick, assessing their own skills and preparation for caring for the terminally ill, as well as the deficiencies felt by the respondents in contacts with the sick and their family.

It is also worth mentioning the research on the profiles of social competencies of people working (in helping professions) and the unemployed, conducted in 2000 by M. Czechowska-Bieluga, A. Kanios and E. Sarzyńska.[8]

In turn, in 2003 K. Bobrowska-Jabłońska[9] studied the importance of emotional intelligence and social competencies in education at Warsaw School of Economics (SGH). The research covered 226 students of this university. The research results revealed that SGH students cope best in situations requiring assertiveness, achieving one's own goals or needs by influencing others or resisting the influence of others, and the weakest in situations of close interpersonal contact, involving extensive disclosure of partners. The students cope relatively well in situations of social exposure, which mean being the object of attention and potential judgment from many people.

In 2005, research on emotional intelligence and social competencies among employed and unemployed people was conducted by M. J. Caban and T. Rewerski.[10] The research results revealed that there are significant differences in the level of emotional intelligence between the groups of employed and unemployed people.

Research on the social competencies of managers and unemployed people was conducted by B. Mazurek-Kucharska.[11] The aim of the research was to answer the question whether two social groups of people functioning differently differ in the level of social competencies.

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[8] M. Czechowska-Bieluga, A. Kanios, E. Sarzyńska, *Profile kompetencji społecznych osób pracujących i bezrobotnych,* Lublin 2000, wyd. UMCS.

[9] K. Bobrowska-Jabłońska, *Znaczenie inteligencji emocjonalnej i kompetencji społecznych w kształceniu w SGH—raport z badań,* E-mentor 2003 no. 2, https://www.e-mentor.edu.pl/artykul/index/numer/2/id/17, (13.06.2023).

[10] M. Caban, T. Rewerski, *Inteligencja emocjonalna i kompetencje społeczne u osób pracujących i bezrobotnych,* „Polityka Społeczna" 2(2005), pp. 8–10.

[11] B. Mazurek-Kucharska, *Kompetencje społeczne we współczesnej psychologii i teorii zarządzania. Przegląd wybranych podejść i problemów*, in: S. Konarski (ed.), *Kompetencje społeczno-psychologiczne ekonomistów i menedżerów Teoria—badania—edukacja,* Warszawa 2006, wyd. SGH, pp. 55–94.

The social competences of students of technical and social sciences were the subject of research by J. Wierzejska.[12] The author's research did not show any significant differences between the studied groups of academic youth.[13]

In turn, in 2018, A. Kanios and A. Bocheńska-Brandt examined the profiles of social competencies of students preparing to care for the elderly. The research results showed significant statistical differences in all distinguished types of social competencies between the studied groups of Polish and German students. In all analysed scales examining social competencies, Polish students achieved slightly higher results.[14]

## 4. Methodological foundations of own research

The main purpose of the research is the diagnosis of the social competencies of students of science and social majors to work as volunteers, and to compare both groups with each other.

The research questions were formulated as follows:

1. What knowledge of volunteer work do students of science and social majors have, and are there any differences between the researched groups in this respect?
2. What social skills do students of science and social majors have, and are there any differences between the studied groups in this respect?
3. What is the motivation for volunteer work among students of science and social majors, and are there any differences between the studied groups in this respect?

For the purposes of this article, the diagnostic survey method was chosen. The research technique employed in the research is the survey technique. Therefore, the study used a research tool which is *A self-designed survey questionnaire for research on the social competences of students of science and social*

[12] J. Wierzejska, *Kompetencje społeczne studentów kierunków technicznych i społecznych*, „Studia Edukacyjne" 39 (2016), pp. 155–168.

[13] E. Turska, *Znaczenie wolontariatu w opiniach studentów pedagogiki*, „Dyskursy Młodych Andragogów", 21(2020), pp. 191–204.

[14] A. Kanios, A. Bocheńska-Brandt, *Profile kompetencji społecznych studentów przygotowujących się do opieki nad osobami starszymi—badanie polsko-niemieckie*, „Kwartalnik Pedagogiczny" 64(2019) 4, pp. 237–254.

*majors to work in volunteering* (*own authorship*). The research was carried out in November 2022 using a Google survey. The research covered students of two universities: SGH Warsaw (science majors) and UMCS (humanities majors: pedagogy, social work, psychology). A total of 190 people were examined. The examination was diagnostic in its nature.

## 5. Own research results

A total of 190 students took part in the study, including less than half of the students (49.47%–94 people) of the Warsaw School of Economics (SGH) and slightly over half of the students (50.52%–96 people) of the Maria Curie-Skłodowska University in Lublin (UMCS).

**Chart 1**. Type of university of respondents

| Type of university | N | % |
|---|---|---|
| SGH | 94 | 49.47 |
| UMCS | 96 | 50.53 |

As empirical analyses have shown, 61.7% of SGH students were women, and less than every fourth respondent was a man (38.3%). In turn, women predominated among the UMCS academic youth. They constituted as much as 95.83% of the surveyed population.

There were only four men, which constitutes 4.17%. The differences between the study groups in this respect are statistically significant (p=0.000).

**Chart 2**. Gender of the surveyed students

| Gender | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Women | 58 | 61.7 | 92 | 95.83 |
| Men | 36 | 38.3 | 4 | 4.17 |

$c^2$=16.64 df=1 p=0.000

Another variable analysed was the level of studies. In both groups, the bachelor's level prevailed. Among SGH students the vast majority, that is, 93.62%, were bachelor's students, only three people (6.38%) studied at Master's level. A similar proportion was observed among UMCS students. Most of them, that is,

85.42%, are first-cycle degree programme students, while less than 15% (14.58%) are Master's level students.

**Chart 3**. Level of studies

| Level of studies | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Bachelor's | 88 | 93.62 | 82 | 85.42 |
| Master's | 6 | 6.38 | 14 | 14.58 |

$c^2$=0,93 df=1 p=0,333

The respondents were also asked what year they were currently studying. Among SGH students, the vast majority, that is, 91.49%, are first-year students. Single people (6 people—2nd year; 2 people—3rd year) studied in higher years of studies. The situation was different among UMCS academic youth. A significant part (62.50%) studied in the first year, but as many as ¼ were third-year students. The remaining 12.5% of respondents were second-year students.

**Chart 4**. Year of studies

| Year of studies | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| 1st year | 86 | 91.49 | 60 | 62.50 |
| 2nd year | 6 | 6.38 | 12 | 12.50 |
| 3rd year | 2 | 2.13 | 24 | 25.00 |

$c^2$=12,61 df=2 p=0,001

An interesting issue, due to the analysed problem, was the respondents' major of study. SGH students represented many different majors of study, while UMCS students represented only two. The majority of students (78.72%) of the university of economics are studying general major, while single people represented finance and accounting, information methods in economics or global business, finance and management. Among students from Lublin, 56.25% studied social work, while the remaining 43.75% studied pedagogy.

Among SGH students, less than half (46.81%) studied full-time. A similar part of them (44.68%) took evening studied. Only eight people (8.51%) took extramural studies. In turn, UMCS students represented 100% of the full-time studies.

**Chart 7**. Study mode

| Study mode | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| full-time | 44 | 46.81 | 96 | 100.00 |
| evening | 42 | 44.68 | 0 | 0.00 |
| extramural | 8 | 8.51 | 0 | 0.00 |

$c^2$ =34.65 df=2 p=0.000

As empirical analyses shown, the vast majority of surveyed students have experience in volunteering. Both SGH students (76.60%) and UMCS students (75%) work for charity.

**Chart 8**. Having experience in volunteer work

| Having experience in volunteer work | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| *Yes* | *72* | *76.60* | *72* | *75.00* |
| *No* | *22* | *23.40* | *24* | *25.00* |

$c^2$=0.329 df=1 p=0.855

The vast majority of young people engage in volunteering informally. As many as 77.78% of SGH students and 63.89% UMCS students did not sign any agreement to help with volunteering. Individual people (from both universities) indicated a formal mode of volunteering. Detailed data is provided in chart no. 9.

**Chart 9**. Ways of becoming involved in volunteering

| Ways of becoming involved in volunteering | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Agreement | 10 | 13.89 | 16 | 22.22 |
| Informal | 56 | 77.78 | 46 | 63.89 |
| Other | 6 | 8.33 | 10 | 13.89 |

The data concerns only those people who engage in volunteering
$c^2$=1,682 df=2 p=0,431

Students usually engage in volunteering occasionally. As the analyses showed, the vast majority of them (80.56%—SGH; 61.11%—UMCS) help unsystematically. Every third (33.33%) UMCS student and every sixth (16.67%) SGH student is involved in permanent volunteering.

**Chart 10**. Types of being involved in volunteering

| Types of being involved in volunteering | SGH | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Permanent | 12 | 16.67 | 24 | 33.33 |
| Occasional | 58 | 80.56 | 44 | 61.11 |
| Other | 2 | 2.78 | 4 | 5.56 |

$c^2$=3.294 df=2 p=0.192

The data concerns only those people who engage in volunteering

Another issue which was analysed were the types of people helped by students who engage in volunteering. As shown in the data in chart no. 11, the vast majority (61.11%) of SGH students are involved in helping children. One third of respondents (33.33%) help elderly people and youth (other students) (30.56%). More than one in four of them (27.78%) work as volunteers for people with disabilities.

A similar distribution of percentage data was observed among UMCS students. The vast majority of them, that is, 77.78%, help children by volunteering. Less than 40% (38.89%) work with elderly people. One third (33.33%) indicated students, and every fourth student indicated refugees (27.78%) and sick people (25%).

**Chart 11**. Types of people helped by students who engage in volunteering

| Types of people | SGH | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Children | 44 | 61.11 | 56 | 77/78 |
| Youth/students | 22 | 30.56 | 24 | 33.33 |
| Elderly people | 24 | 33.33 | 28 | 38.89 |
| Sick people | 22 | 30.56 | 18 | 25.00 |
| Disabled people | 20 | 27.78 | 16 | 22.22 |
| Refugees | 6 | 8.33 | 20 | 27.78 |
| Migrants | 0 | 0.00 | 6 | 8.33 |
| People with addictions | 4 | 5.56 | 0 | 0.00 |
| Other people | 8 | 11.11 | 6 | 8.33 |

The data concerns only those people who engage in volunteering

The vast majority of students could not precisely determine how much time they devote to volunteer work. This is probably due to the fact that most of them engage in volunteer work on an unsystematic basis. However, every fourth (25%) UMCS student devotes three to four hours a week to volunteering.

**Chart 12**. The amount of time (weekly) devoted to volunteer work

| Amount of time | SGH | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| 1–2 hours | 8 | 11.11 | 6 | 8.33 |
| 3–4 hours | 10 | 13.89 | 18 | 25.00 |
| 5–8 hours | 2 | 2.78 | 4 | 5.56 |
| Over 8 hours | 2 | 2.78 | 0 | 0.00 |
| Difficult to determine | 50 | 69.44 | 44 | 6.11 |

$c^2$=2.810 df=4 p=0.590
The data concerns only those people who engage in volunteering

According to the adopted concept of social competencies, they are understood as a set of knowledge, motivation and social skills. Therefore, the individual components of social competences for volunteering will be described later.

The first analysed variable is the knowledge of volunteer work possessed by students of science and social majors. In this respect, the issue was the rules that should be followed when engaging in volunteering. The surveyed SGH students indicated the principle of honesty as the most important. This choice was made by as many as 76.6% of respondents. Next the principle of respect for privacy (68.09%) and the principle of acceptance (63.83%) were pointed out. Students of social sciences made a similar choice. The principle of honesty (89.58%), the principle of acceptance (87.5%) and the principle of respect for privacy (79.17%) were also indicated as the most important principle.

The surveyed students were also asked about activities performed during their volunteer work. Most economics students indicated organizing charity events (52.78%). Every third of them (33.33%) gives private lessons. Less than ⅓ (30.56%) indicated help with cleaning activities. Every fourth SGH student indicated explaining difficult issues (27.78%) and organizing special events (25%). Slightly different activities are performed by students of social studies when performing voluntary work. The most frequently mentioned were conversations with the people under their care (58.33%) and organising charity events

(58.33%). Less than 40% organise special events. Going for walks with people in need also turned out to be an important issue (36.11%).

**Chart 13**. Principles to follow when engaging in volunteering

| Principles | Science majors | | Social majors | | c2 | p |
|---|---|---|---|---|---|---|
| | N | % | N | % | | |
| The principle of respect for privacy | 64 | 68/09 | 76 | 79.17 | 1,503 | 0.220 |
| The principle of proper communication | 54 | 57.45 | 72 | 75.00 | 3,275 | 0.070 |
| The principle of acceptance | 60 | 63.83 | 84 | 87.50 | 7,251 | 0.007 |
| The principle of trust | 50 | 53.19 | 74 | 77.08 | 5,979 | 0.014 |
| The principle of honesty | 72 | 76.60 | 86 | 89.58 | 2,007 | 0.156 |

The data does not add up to 100% because the selection was multiple

**Chart 14**. Activities performed in the course of volunteer work

| Activities performed in the course of volunteer work | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Having conversations | 24 | 33.33 | 42 | 58.33 |
| Going for walks | 16 | 22.22 | 26 | 36.11 |
| Explaining. clarifying | 20 | 27.78 | 18 | 25.00 |
| Helping with cleaning | 22 | 30.56 | 24 | 33.33 |
| Organising charity events | 38 | 52.78 | 42 | 58.33 |
| Giving lectures on a given topic | 8 | 11.11 | 6 | 8.33 |
| Providing assistance with personal hygiene activities | 2 | 2.78 | 6 | 8.33 |
| Helping with homework (tutoring) | 24 | 33.33 | 18 | 25.00 |
| Organizing special events | 18 | 25.00 | 28 | 38.89 |
| Establishing contacts with institutions and organizations | 2 | 2.78 | 16 | 22.22 |

The data does not add up to 100% because the selection was multiple

How do students find out about the possibility of volunteering? This issue also seemed quite intersting. As empirical analyses shown, this feature does not differentiate the respondents. Most often, these are friends who volunteer. This answer was given by 75% of SGH students and 77.78% of UMCS students.

Science major students also mentioned student organisations operating at the university (72.22%) and Facebook (66.67%). Students of social sciences indicated the Internet (72.22%) and student organisations (52.78%).

**Chart 15**. Sources of knowledge about volunteering

| Sources of knowledge about volunteering | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| From the Internet | 44 | 61.11 | 56 | 72.22 |
| From Facebook | 48 | 66.67 | 36 | 50.00 |
| Through student organizations operating at the university | 52 | 72.22 | 38 | 52.78 |
| Through friends who volunteer | 54 | 75.00 | 56 | 77.78 |
| Through conversations with academic teachers | 6 | 8.33 | 22 | 30.56 |
| Through student internships | 2 | 2.78 | 24 | 33.33 |

The data does not add up to 100% because the selection was multiple

The opinions of the surveyed students on the personality traits of a good volunteer, were one of the analysed issues in terms of students' knowledge about volunteer work. The students of science and social sciences indicated empathy (SGH—80.85%; UMCS—89.58%), openness (SGH—78.72%; UMCS—93.75%) and communication skills (SGH—74,47%; UMCS—75%).

**Chart 16**. Opinions of the surveyed students on the personality traits of a good volunteer

| Opinions of the surveyed | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Openness | 74 | 78.72 | 90 | 93.75 |
| Communication skills | 70 | 74.47 | 72 | 75.00 |
| Empathy | 76 | 80.85 | 86 | 89.58 |
| Responsibility | 58 | 61.70 | 70 | 72.92 |
| Honesty | 60 | 63.83 | 66 | 68.75 |
| Punctuality | 22 | 23.40 | 24 | 25.00 |
| Careful listening | 44 | 46.81 | 66 | 68.75 |
| Sensitivity | 52 | 55.32 | 76 | 79.19 |

The data does not add up to 100% because the selection was multiple

The respondents were also asked about the benefits of volunteering. As the analyses showed, for both groups of surveyed students the most important thing is the opportunity to help those in need (SGH—89.36%; UMCS—95.83%). In addition, students of science and social studies indicated:

- the opportunity to gain new knowledge and skills (SGH—53.19%; UMCS—72.92%);
- the opportunity to gain new experience (SGH—53.19%, UMCS—81.25%);
- the opportunity to change one's mind-frame (SGH—51.06%; UMCS—62.5%);
- the opportunity to influence the surrounding reality (UMCS—68.75%);
- the opportunity to meet new people (SGH—48.94%).

**Chart 17**. Benefits of volunteering

| Benefits | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| The opportunity to help those in need | 84 | 89.36 | 92 | 95.83 |
| The opportunity to influence the surrounding reality | 40 | 42.55 | 66 | 68.75 |
| The opportunity to meet new people | 46 | 48.94 | 44 | 45.83 |
| The opportunity to gain new knowledge and skills | 50 | 53.19 | 70 | 72.92 |
| The opportunity to gain new experience | 50 | 53.19 | 78 | 81.25 |
| The opportunity to gain professional internship | 18 | 19.15 | 38 | 39.58 |
| The opportunity to change one's mind-frame | 48 | 51.06 | 60 | 62.50 |

The data does not add up to 100% because the selection was multiple

Another analysed variable was motivation to work as a volunteer. In this respect, there were slight differences between the studied groups. SGH students indicated the following motives for volunteering:

- willingness to help others—87.23%;
- satisfaction, self-satisfaction—65.96%;
- willingness to meet new people—51.06%;
- gaining knowledge and new skills—44.68%;
- self-fulfilment—42.55%.

In turn, students of social sciences most often indicated the following motives:

- willingness to help others—85.42%;
- gaining professional experience—60.42%;
- gaining knowledge and new skills—58.33%.

**Chart 18**. Motives for volunteering

| Motives | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Willingness to help others | 82 | 87.23 | 82 | 85.42 |
| Satisfaction and self-satisfaction | 62 | 65.96 | 56 | 58.33 |
| Increased self-esteem | 28 | 29.79 | 26 | 27.08 |
| Willingness to meet new people | 48 | 51.06 | 34 | 35.42 |
| Gaining knowledge and new skills | 42 | 44.68 | 56 | 58.33 |
| Gaining professional experience | 22 | 23.40 | 58 | 60.42 |
| Self-fulfilment | 40 | 42.55 | 48 | 50.00 |
| Preparation for your future profession | 12 | 12.77 | 46 | 47.92 |

The data does not add up to 100% because the selection was multiple

Students who perform volunteer work were asked to rate their own level of motivation to volunteer work. SGH students turned out to be more self-critical in this respect. Nearly half of them (44.44%) rated their level of motivation for charity work as average. The same number of respondents (27.78%) stated that their level of helping was high or low. The situation in this respect is slightly different in the group of UMCS students. The vast majority of them (75%) rate their level of motivation as average. Almost every fifth respondent (19.44%) indicated a high level of motivation for voluntary work. Only four people (5.56%) assessed that they had a low level of motivation to help. There were statistically significant differences between the study groups (p=0.030).

**Chart 19**. Assessment of one's own level of motivation to volunteer

| Level of motivation | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| High level of motivation | 20 | 27.78 | 14 | 19.44 |
| Medium level of motivation | 32 | 44.44 | 54 | 75.00 |
| Low level of motivation | 20 | 27.78 | 4 | 5.56 |

$c^2$=8.943 df=3 p=0.030
The data concerns only those people who engage in volunteering

In turn, the group of people who do not engage in volunteering were asked about the reasons for this decision. Students of both groups most often indicated

lack of free time, not feeling such a need at this point in their lives, or lack of faith in their own abilities. Detailed data is provided in chart no. 20.

**Chart 20**. Reasons for not engaging in volunteering

| Reasons for not engaging in volunteering | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Lack of free time | 12 | 54.55 | 12 | 50.00 |
| Lack of proper knowledge and skills | 2 | 9.09 | 4 | 16.67 |
| Lack of faith in their own abilities | 2 | 9.09 | 8 | 33.33 |
| Unpopularity of volunteer work | 2 | 9.09 | 2 | 8.33 |
| No need felt | 10 | 45.45 | 6 | 25.00 |
| I don't know where to apply, how to start | 4 | 18.18 | 4 | 16.67 |

The data concerns only those people who engage in volunteering

The last issue analysed in this research project is students' social skills for volunteer work. Firstly, the surveyed academic youth were asked about their opinions on whether they had the skills needed to work as volunteers. The vast majority of them (both SGH and UMCS students) believe that they have such skills. As many as 65.96% of SGH students and 64.58% of UMCS students are convinced of this fact. Percentage differences were visible among undecided people. As many as 1/3 (31.25%) of students of social sciences and 23.4% of students of economics had difficulty in expressing a clear opinion on this issue.

**Chart 21**. Opinions on the skills of the surveyed students needed for volunteer work

| Opinions of the surveyed | Science majors | | Social majors | |
|---|---|---|---|---|
| | N | % | N | % |
| Yes | 62 | 65.96 | 62 | 64.58 |
| No | 10 | 10.64 | 4 | 4.17 |
| O don't know/It's hard to say | 22 | 23.40 | 30 | 31.25 |

$c^2$=1.890 df=3 p=0.030

The last issue analysed was self-assessment of skills required for volunteer work. The following types of skills were analyzed: communication skills, creativity and creative work skills, group/team work skills, good work organisation skills and specialised skills.

When it comes to communication skills, the largest percentage of SGH students (42.55%) rate it at a high level, while the largest group of UMCS students rate it at an average level (47.92%). Both groups of respondents assessed the creativity and creative work skills as well as the group/team work skills at an average level.

In turn, good work organisation skills were rated at a high level in both groups. Quite important specialised skills at the disposal of the surveyed youth are, in their opinion, at an average level.

There were no statistically significant differences in this respect between the study groups.

**Chart 22**. Self-assessment of skills needed for volunteer work

| Opinions of the surveyed | | Science majors | | Social majors | | $\chi^2$ | p |
|---|---|---|---|---|---|---|---|
| | | % | N | N | % | | |
| Communication skills | High level | 40 | 42.55 | 32 | 33.33 | 1.386 | 0.499 |
| | Medium level | 34 | 36.17 | 46 | 47.92 | | |
| | Low level | 20 | 21.28 | 18 | 18.75 | | |
| Creativity and creative work skills | High level | 18 | 19.15 | 22 | 22.92 | 0.209 | 0.900 |
| | Medium level | 52 | 55.32 | 50 | 52.08 | | |
| | Low level | 24 | 25.53 | 24 | 25.00 | | |
| Group/team work skills | High level | 32 | 34.04 | 34 | 35.42 | 0.284 | 0.867 |
| | Medium level | 34 | 36.17 | 38 | 39.58 | | |
| | Low level | 28 | 29.79 | 24 | 25.00 | | |
| Good work organisation skills | High level | 40 | 42.55 | 40 | 41.67 | 0.023 | 0.988 |
| | Medium level | 28 | 29.79 | 30 | 31.25 | | |
| | Low level | 26 | 27.66 | 26 | 27.08 | | |
| Specialised skills | High level | 20 | 21.28 | 30 | 31.25 | 1.532 | 0.464 |
| | Medium level | 56 | 59.57 | 46 | 47.92 | | |
| | Low level | 18 | 19.15 | 20 | 20.83 | | |

## 6. Summary

The surveyed students who engage in volunteer work are mostly women. The vast majority of them are first-year bachelor's degree students. Students of sciences majors represented mainly economic sciences, while students of social sciences represented social work and pedagogy. The vast majority of young people engage in volunteering informally. They could not determine exactly how much time they devote to volunteer work. This is probably due to the fact that most of them engage in volunteer work occasionally.

It turns out that, most often volunteers offer their assistance to children.

Analysing the issues of social competencies for volunteer work, a general conclusion can be drawn that the surveyed students have the necessary knowledge, motivation and skills for volunteer work. Interestingly, the differences between the studied groups are actually small and concern only the assessment of their own level of motivation to help. And the motivation to help pro-socially is an extremely important predictor of action. Aristotle has already claimed that true human happiness, which he understood as eudaimonia, consists more in loving than in being loved.[15] We find a similar meaning in the words attributed to St. Paul, who emphasized that "it is more blessed to give than to receive" (Ac 20:35).

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# Impacts of the Coronavirus Pandemic on Social Problems and Poverty of the Elderly in Slovakia

## Abstract

This article analyses the impact of the coronavirus pandemic on the social problems and poverty of the elderly. Quarantine measures caused increased isolation, loneliness, psychological problems and limited access to medical care, which negatively affected their physical and mental health. The demographic shift towards an aging population presents seniors with complex challenges, including the struggle to meet basic needs and live on the poverty line. These related problems, associated with a lack of attention from the environment, have a negative impact on their quality of life. In the article, we analyse the state of poverty development, based on current statistics. The current isolation, loneliness and loss of independence are intertwined with low income and the possibility of institutionalization, which has increased with the advent of the pandemic situation and the economic crisis.

## Keywords

poverty of seniors, pandemic Covid-19, statistical analyses of poverty, ageing

## 1. Introduction

Over the past two years, the world has found itself struggling with an unprecedented global pandemic that has significantly affected all spheres of human life. The economic crisis caused by the Coronavirus brought with it not only challenges in the field of public health, but also fundamental economic and social impacts on almost all groups of the population; those most affected are women, seniors, single mothers or long-term employees over 55 years of age. The group mostly at risk of poverty are seniors, who are not included in the labour market and are dependent on the social services system. As a result of their low income, they cannot secure adequate health and social care. Another group at risk of poverty are the Roma people, who due to reduced mental health, become unaccepted by society. Their level of poverty is inherited from generation to generation, which we call intergenerational poverty. The study revealed a positive correlation between family environment, social environment conditions and poverty. The identification of these relationships, in the context of the marginalized Roma environment, points to the need for specially targeted and culturally sensitive interventions. Social factors such as discrimination, poverty and lack of access to resources can negatively affect their quality of life.[1] Other study research studies[2] figure out the correlation between age and gender, psycho well-being and pandemic crisis. To a greater extent, women showed lower emotional resistance and deteriorated psychological health compared to men during the pandemic, while women (45.4%) experienced worse social isolation compared to men (34.6%).

The Covid-19 pandemic has put a lot of pressure on the provision of social services for vulnerable groups. The closure of some services and restrictions on movement have limited the access of vulnerable groups to important basic services; the number of day-patients has decreased and deaths have been observed in social care facilities.[3]

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

[2] L.L Cintulová, L. Radková, Z. Budayová, *Mental health of Roma women in post-covid era*, "Acta Missiologica" (2022) 16 Nr 2, pp. 116–129.

[3] L.L. Cintulová, Z. Budayová, S. Buzalová, *Historical development and transformation of senior social services in Slovakia* (monography), Ireland 2022, International scientific board of catholic researchers and teachers in Ireland.

The struggle to provide basic needs and living on the poverty line represent serious challenges for seniors, which can have a negative impact on their physical and mental health. These difficulties are often accompanied by a lack of attention from those around them, which can exacerbate feelings of isolation and loneliness in older individuals. Low income and the possibility of institutionalization only compound the complexity of this situation. It is apparent that seniors face many difficulties, including the loss of independence and the need to cope with the possibility of the disintegration of their previous life values. These values were created and shaped during the productive period of their lives. The fact that they have to cope with difficult life situations in the late stages of life can lead to increased stress and emotional burden.

It is important to realize that the negative impact of these factors on the health of seniors does not only have individual consequences, but can also have broader implications for society. Adequate support and care for seniors, with an emphasis on their social, psychological and economic needs, can play a key role in ensuring their dignified and quality life in the face of these significant challenges.

The fact that there is a positive correlation with poverty, suggests that family environment and social conditions may be important factors in shaping the economic situation of individuals and families. For example, limited access to social, economic or educational resources in the family environment can contribute to poverty, while the transition to seniority becomes more complicated in terms of financial security. The long duration of the coronavirus pandemic also has an impact on the risk of poverty[4]. The pandemic has had significant effects on mental health. Study has explored how age and gender intersect with mental health outcomes, including stress, anxiety, and depression. Women are more likely to report higher levels of psychological distress, especially at senior age.[5]

[4] K. Bundzelová, L.L. Cintulová, S. Buzalová, *Sociálna práca s osobami vyššieho veku*, Bratislava 2023, Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety v Bratislave.

[5] L.L. Cintulová, P. Beňo, T. Pavlovičová, *Aspects of social services and wellbeing in postcovid era*, „Int J Health New Tech Soc Work" (2023) 18 Nr 3, pp. 106–114.

## 2. Risks of an aging population and aspects of poverty

In line with Eurostat's 2011 forecasts, by 2050, the world's demographic structure will change fundamentally, when the number of people over 60 exceeds the number of children under 15. This demographic shift means that every inhabitant of the planet will be a member of the older generation. Specifically in Slovakia, it is expected that by 2070 the share of seniors in the total population will increase to 35%, which undoubtedly represents a challenge for the social and health system. The current Slovak pensioner, as a result of his living situation and quality of life, faces the risk of social exclusion, gradually becoming a marginal figure in various areas of social participation. Leškova[6] stated that basic living costs are a source of stress and worry for seniors, as their financial resources are insufficient. This reaction is understandable, given the given economic situation. Pensioners are a vulnerable group at risk of poverty, due to low incomes and high living costs and rising prices. For them, poverty is a concrete reality that affects their daily life. Some seniors therefore have to completely change their lifestyle.

Study based on the analyses of the impact of pandemic crisis on the stigmatization of vulnerable people, have shown that they face increase rate of poverty due low living standard and lack of health care. During the pandemic, many of inhabitants did not access to health care in the time they need it, it caused more social exclusion.[7]

In Europe, children and the elderly, who had limited opportunities to earn income from work, were traditionally considered at-risk groups for poverty. This phenomenon is called old poverty and was typical of the first half of the 20th century. The old poverty was replaced by a new poverty.[8] Authors[9] in the study expressed that the new poverty is a phenomenon which arose in connection with industrialization and globalization, and which changed the conditions of people's existence. The new poverty applies mainly to those

[6] A. Lešková, *Príbeh staroby alebo život seniora optikou sociálnej zraniteľnosti*, „Slovenské pohľady na literatúru, umenie a vedu" (2018) Nr 10, pp. 29–33.

[7] Z. Budayová, L.L. Cintulová, *Stigmatization and harm reduction of drug users in post-covid era*, „Acta Missiologica" (2023) 17 Nr 1, pp. 122–130.

[8] A. Banovčinová, *Chudoba a sociálne vylúčenie*, Trnava 2023, TypiUniversitatis Tyrnaviensis, p. 185.

[9] S. Miháliková, E. Bútorová (eds), *Starší ľudia medzi nami. Kde sme, kam smerujeme*, „Sociológia—Slovak Sociological Review" (2023) 55 Nr 3, pp. 370–374.

who are marginalized in the labour market or have low incomes from paid activities. The new poverty is manifested by material and social deprivation and is characterized by developed and transforming countries. New poverty is a phenomenon that occurs in the 20th and 21st centuries, in countries with a high level of industrial development and social protection. It is poverty that is born in contrast to wealth and that is associated with exclusion from the labour market, education and health care.[10] Bočáková[11] states that differences in one's wealth and low employment income are the main determinants of poverty and emphasises that low income has a direct impact on poverty, but is also related to low old-age pensions.

## 3. Influence of pandemic on the poverty

Due to the impact of the Covid-19 pandemic, global progress in poverty reduction has stopped. More than one billion people have been lifted out of extreme poverty in the previous three decades. The incomes of the least developed countries grew. By 2015, it was possible to reduce the global rate of extreme poverty by more than half. Subsequently, the pace of reduction slowed down due to weak global economic growth. The economic recession caused by Covid-19 and later, the war in Ukraine destroyed this progress. The global goal of eliminating extreme poverty by 2030 is unrealizable. According to current trends, in 2030, 574 million people—almost 7% of the world's population, mostly in Africa—will still live in extreme poverty. The largest annual increase since global poverty monitoring began in 1990 was recorded in 2020, in which the number of extremely poor people increased by more than 70 million. If we use a broader definition of poverty, almost half of the world—more than 3 billion people—live on less than $6.85 a day, the average of national poverty lines for upper-middle-income countries. According to this criterion, poverty is widespread and persistent even outside of Africa. Poverty threatens the prospects of billions of people around the world. The data confirms that the income losses of the poorest 40% of the world's population were double that of the

[10] K. Bundzelová, L.L. Cintulová, S. Buzalová, *Sociálna práca s osobami vyššieho veku*, Bratislava 2023, Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety v Bratislave, p. 119.

[11] O. Bočáková, *Pohľad na chudobu cez prizmu súčasnej rodiny, chudoba ako teoreticky a praktický problém*, zborník vedeckých štúdií, Trnava 2021, Trnava university, pp. 71–95.

richest 20%.[12] According to the World Bank in 2020, the pandemic has become a factor in global inequality, which has increased again after a long period. Its negative effects were felt most by those who were already in the greatest poverty. Their incomes fell twice as much as the incomes of the richest. In addition, they faced serious obstacles in health and education, which could have lasting consequences on their future standard of living. Based on the available information, it is clear that the pandemic caused an increase in poverty, especially among people of retirement age, which also affected Slovakia.[13]

## 4. Research and statistical analyses

The aim of the study is to analyse statistical data that includes the effects of inflation and the pandemic situation on poverty and the quality of life of older groups of citizens who are most at risk of social exclusion. Inflation, coupled with the coronavirus pandemic, poses a complex challenge to the economy and social stability. The effects of these factors on the elderly population are subjected to careful analysis to understand how these trends affect their financial situation and overall quality of life. Statistics on poverty among older people in the context of inflation and the pandemic allow us to identify increased risks in terms of income, access to health care and social integration. High inflation can lead to the devaluation of money and, consequently, to the loss of the purchasing power of pensions, which has a direct impact on the living conditions of senior citizens.

The results of this analysis should serve as a basis for the creation of targeted policies and measures that should mitigate the effects of inflation and the pandemic on the elderly population. According to the data of the Statistical Office of the Slovak Republic (hereinafter ŠÚSR), there was a gradual increase in inflation measured by the consumer price index. In 2020, the average annual inflation was 1.9%, which represents a slight increase compared to the previous year. The following year, in 2021, inflation rose to 3.2%, signalling an acceleration in price growth. In 2022, the situation worsened significantly, when inflation

[12] A. Widuto, *Energy poverty in the EU, European Parliamentary Research Service 2023*, https://www.europarl.europa.eu/ (23.12.2023).

[13] World bank group, *Correcting course. Poverty and shared prosperity 2022*, Washington DC 2022, International Bank for Reconstruction and Development, p. 271.

reached an average value of 12.8%, which indicates a significant increase in the price of goods and services in Slovakia.[14]

In January 2022, inflation increased to 8.4%, driven mostly by rising energy and food prices. Year after year price growth in January 2022 reached the highest monthly inflation value in the Slovak Republic for more than 17 years (since July 2004). Both month after month and year after, the prices of the most important items in the consumer basket of Slovak households moved, namely rising food prices by more than 8%, housing and energy prices, and fuel prices by 12.6%. Only the price reduction of clothing and footwear had a moderate dampening effect on a month after month basis. The largest item in the expenditure structure of Slovak households—housing and energy—increased the price growth to a value of 12.6%, which was primarily caused by the increase in regulated energy prices.[15]

According to the latest Eurostat statistics (2023), in August 2023, the Eurozone saw annual inflation fall to 5.2%, a slight improvement on the 9.1% recorded the previous year. In the broader context of the European Union (hereafter EU), inflation in August 2023 was set at 5.9%, which represents a decrease compared to 10.1% in 2022. In Slovakia, a decrease in annual inflation was recorded to 9.6% in August 2023, in compared to 13.4% in the previous year, ranking Slovakia third in the EU and first in the eurozone in terms of annual inflation rate.[16]

Year-on-year, aggregate inflation reached 7.1% in October 2022. Food was 8.9% more expensive year-on-year, so after 20 months, the growth in their prices fell below the level of 10%. Only bread and cereals had a double-digit rate of price growth, as well as less important food components by weight—such as fish, sugar and confectionery, as well as spices and ingredients. Only oils and fats were cheaper year-on-year by 8.2%. The growth of prices in the housing and energy sector moderated to 5.8% compared to October 2022,[17] which was the lowest

[14] R. Vlačuha, Y. Kováčová, EU SILC *2020 Indikátory chudoby a sociálneho vylúčenia—životné podmienky,* Bratislava 2020, ŠÚ SR, https://slovak.statistics.sk/ (21.12.2023).

[15] R. Vlačuha, Y. Kováčová, M. Kubala, *EU SILC 2021 indikátory chudoby a sociálneho vylúčenia, životné podmienky*, Bratislava 2022, Štatistický úrad Slovenskej republiky, https://slovak.statistics.sk (20.12.2023).

[16] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad Slovenskej republiky, https://slovak.statistics.sk/ (21.12.2023).

[17] R. Vlačuha R., Y. Kováčová, M. Kubala, *EU SILC 2021 indikátory chudoby a sociálneho vylúčenia, životné podmienky*, Bratislava 2022: Štatistický úrad Slovenskej republiky, https://slovak.statistics.sk (21.12.2023).

value since the end of 2021. A more significant slowdown in the growth rate was recorded by prices in transport, mainly due to the continued decline in fuel prices, which were by 6.3% cheaper than in October a year ago. In October 2023, the consumer price index increased year-on-year for households of employees by 7.2%, for low-income households by 7.3% and for households of pensioners by 6.8%. In summary for the ten months of 2023, consumer prices increased by 11.5% year-on-year (for households of employees by 11.4%, for low-income households by 12.1% and for households of pensioners by 11.9%).[18]

According to the latest Eurostat and ŠÚSR statistics, due to the pandemic, there was a sharp increase in inflation, which had a significant impact on the economic conditions of lonely seniors. This population group has become particularly vulnerable, due to the rising cost of living. In the next section of our article, we will focus on the analysis of the factors that determine the occurrence of poverty and the identification of groups that are most exposed to the risk of poverty. We assume that the segment of lonely pensioners is also the group of people most at risk of poverty.

## Analyse: risk of poverty rate and demographic indicators

Vlačuha and Kováčová[19] define the poverty risk rate as "the share of persons (in percentage) in the total population whose equivalent disposable income is below the poverty risk threshold". They further state that this fact has also been picked up by the harmonized statistical survey of the member states of the European Union (hereafter EU)—"Survey on income and living conditions—EU SILC, which is the official source of data with which we obtain a comprehensive picture of poverty and social exclusion." In Slovakia, the EU SILC sample survey has been implemented since 2005.[20]

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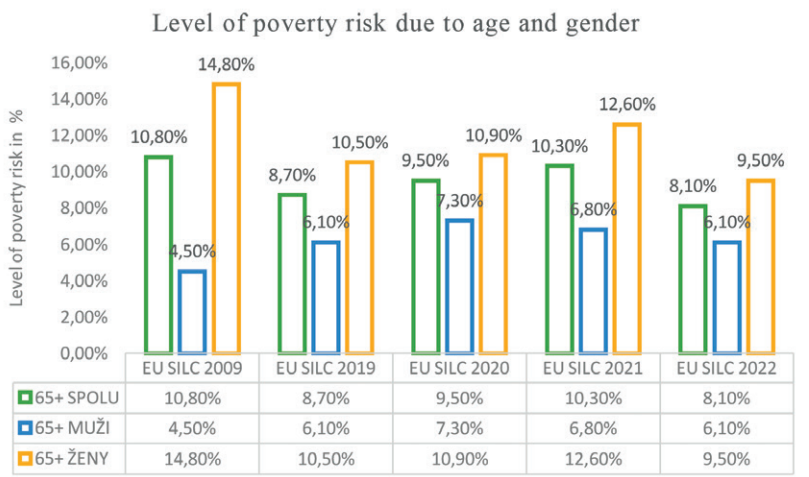
[18] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad Slovenskej republiky, https://slovak.statistics.sk/ (21.12.2023).

[19] R. Vlačuha, Y. Kováčová, M. Kubala, *EU SILC 2021 indikátory chudoby a sociálneho vylúčenia, životné podmienky*, Bratislava 2022, Štatistický úrad Slovenskej republiky, https://slovak.statistics.sk (21.12.2023).

[20] R. Vlačuha, Y, Kováčová, J. Velčická, *EU SILC Vývoj chudoby a životných podmienok v SR 2009–2014*, Bratislava 2015, Štatistický úrad Slovenskej republiky, september 2015 č. 900—0075/2015, https://slovak.statistics.sk/ (23.12.2023).

Our opinion is in accordance with the authors of Vlačuha et al.[21] claimed that according to statistical data from the EU — SILC, which are visualized on Graph 2, the at-risk-of-poverty rate for the 65+ demographic group confirms the existence of gender differences, meaning that women, including single pensioners, are at a higher risk of poverty than men. When comparing the years 2009—2019, the poverty risk rate for women decreased by 4.3%, which represents a decrease to 10.5%. However, the impact of the pandemic in 2021 caused the highest increase in this rate to 12.6%. The graphic data showed that when comparing the years 2009 and 2022, there was only a slight change in the poverty risk rate for persons aged 65+. Despite the fact that the impact of the pandemic increased the poverty risk rate, lower values were recorded in 2021 and 2022.[22]




| | EU SILC 2009 | EU SILC 2019 | EU SILC 2020 | EU SILC 2021 | EU SILC 2022 |
|---|---|---|---|---|---|
| 65+ SPOLU | 10,80% | 8,70% | 9,50% | 10,30% | 8,10% |
| 65+ MUŽI | 4,50% | 6,10% | 7,30% | 6,80% | 6,10% |
| 65+ ŽENY | 14,80% | 10,50% | 10,90% | 12,60% | 9,50% |

**Graph 1**. Level of poverty risk based on age and gender

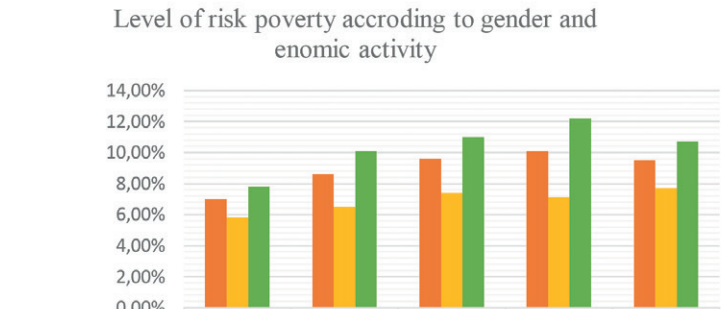
Based on the available statistics, we conducted an analysis that revealed that 2021 saw the greatest increase in poverty in the general population and affected women the most, while 2020 was more difficult for men. In our view, this data points to significant gender differences in the risk of poverty rate and signal the

[21] A. Widuto, *Energy poverty in the EU*, European Parliamentary Research Service 2023, https://www.europarl.europa.eu/ (23.12.2023).

[22] R. Vlačuha, Y. Kováčová, EU SILC *2020 Indikátory chudoby a sociálneho vylúčenia—životné podmienky,* Bratislava 2020, ŠÚ SR, https://slovak.statistics.sk/ (21.12.2023).

need for further research and policy action. Next, we analyse the percentage differences in the rate of poverty risk among single pensioners, in the context of economic activity, with an emphasis on gender differences.

Graph 2 explicitly shows an upward trend in the percentage of at-risk-of-poverty, which is correlated with economic activity and gender in the group of pensioners in the time frame from 2018 to 2022. In 2018, the overall at-risk-of-poverty rate reached 7% and in 2022 it increased to 9.50 %. The most significant increase was recorded in 2021, where the total value reached 10.1% and for women 12.2%. Gender inequality was again on display, with women of pensionable age at higher risk of poverty than men. Furthermore, from the graphical display, we can assume that the impact of the pandemic began to show slightly from 2020, while the peak was reached in 2021. However, the annual overall percentage ratio is 0.6% smaller and for women 1.5% lower compared to 2021 Thisdata indicates that the impact of the pandemic on the economic situation has eased slightly, but the situation is still worse than in 2018.[23]




| | EU SILC 2018 | EU SILC 2019 | EU SILC 2020 | EU SILC 2021 | EU SILC 2022 |
|---|---|---|---|---|---|
| spolu dôchodcovia | 7,00% | 8,60% | 9,60% | 10,10% | 9,50% |
| muži | 5,80% | 6,50% | 7,40% | 7,10% | 7,70% |
| ženy | 7,80% | 10,10% | 11,00% | 12,20% | 10,70% |

**Graph 2**. Poverty risk rate by economic activity and by gender

[23] R. Vlačuha, Y. Kováčová, M. Kubala, *EU SILC 2021 indikátory chudoby a sociálneho vylúčenia, životné podmienky*, Bratislava 2022, Štatistický úrad SR, https://slovak.statistics.sk (20.12.2023).

Income is redistributed between individuals and households through social transfers and taxes, which can have a significant impact on poverty and income inequality. This means that poverty and social exclusion can be reduced with the help of social protection measures. This goal can be achieved, for example, by providing social benefits. One of the methods of evaluating the effectiveness of social protection measures, is the comparison of poverty risk indicators, before and after social transfers.[24]

In the EU SILC survey, the following are considered social transfers: family benefits and allowances for families with children, housing allowances, unemployment benefits, old-age benefits, survivors' benefits, sickness benefits, disability benefits, education allowances, allowances and allowances within social exclusion.[25]

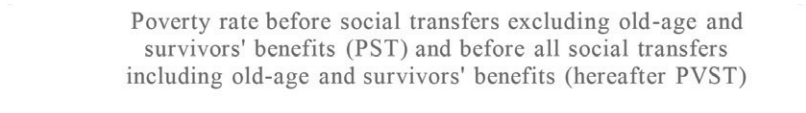
Graph 3 presents the level of the risk of poverty through the implementation of social transfers, with the exception of pension and survivor benefits, and in parallel shows the level of the poverty risk rate before all social transfers (including pension and survivor benefits) from 2018 to 2022. The graph shows that the poverty risk rate of persons 65+ has gradually increased over the five-year period, and despite the decrease in 2022[26], the percentage difference is still 1.6% higher than in 2018. The gender gap is evident, but it is interesting to note that according to the graph, women over 65 are exposed rate of poverty risk before social transfers (except pension and survivor benefits) more than men, and vice versa before all transfers, i.e. including pension and survivor benefits, men are more exposed to the risk of poverty than women. This points to the fact that women in the past had lower salaries or stayed at home, which is still reflected in their pension. According to Graph 3, social transfers are vitally important, because without social assistance from the state, the poverty risk rate for both sexes exceeded the 80% mark. Without state welfare, the at-risk-of-poverty rate for women reached a maximum of 84.30% in 2021, and with survivor benefits and pension benefits, the highest value was 16.10% in 2020 and 2021, a 68.2% increase. For men, the highest value before social transfers was in 2020, reaching

[24] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad SR, https://slovak.statistics.sk/ (21.12.2023).

[25] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad SR, https://slovak.statistics.sk/ (21.12.2023).

[26] R. Vlačuha, Y. Kováčová, M. Kubala, *EU SILC 2021 indikátory chudoby a sociálneho vylúčenia, životné podmienky*, Bratislava 2022, Štatistický úrad SR, https://slovak.statistics.sk (20.12.2023).

11.5%, and before all social transfers, including survivors' and old-age benefits, in 2021, it increased by 72.80%, reaching a value of 84.3%.[27]




| | EU SILC 2018 - PST | EU SILC 2018 - PVST | EU SILC 2019- PST | EU SILC 2019- PVST | EU SILC 2020- PST | EU SILC 2020- PVST | EU SILC 2021- PST | EU SILC 2021- PVST | EU SILC 2022- PST | EU SILC 2022- PVST |
|---|---|---|---|---|---|---|---|---|---|---|
| 65 + | 9,80% | 79,70% | 13,40% | 81,70% | 14,20% | 79,50% | 14,10% | 82,20% | 11,40% | 81,30% |
| 65+ muži | 7,10% | 79,40% | 10,00% | 83,10% | 11,50% | 82,70% | 11,10% | 84,30% | 9,00% | 84,00% |
| 65+ ženy | 11,50% | 79,90% | 15,60% | 80,90% | 16,10% | 77,30% | 16,10% | 80,80% | 12,90% | 79,50% |

**Graph 3**. Poverty rate before social transfers excluding old-age and survivors' benefits

In our opinion, social transfers for people over 65 years of age, who are often exposed to a higher risk of the poverty rate, are cardinal for ensuring basic living conditions. Although social transfers contribute to poverty reduction, they are not always adequate. The key tool in the fight against poverty and social exclusion is national legislation, which creates a legal and terminological environment, defines individual measures, the conditions of their use and exploitation, and target groups.

[27] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad SR, https://slovak.statistics.sk/ (21.12.2023).

## 5. Discussion

The study[28] claims that in 2022, there was a tendency for energy prices to rise, which escalated after Russia's military intervention in Ukraine in February 2022. This phenomenon caused serious consequences for a large part of the European population, which was already affected by the Covid-19 pandemic. According to him, the European commission (2022) analysed other factors such as high inflation rate, inadequate growth of energy prices, low level of income and suboptimal energy efficiency in households, which influenced the increase of EP. Widuto[29] states, that according to the European index of domestic energy poverty (hereinafter EDEPI) in 2022, EP is the lowest in Slovakia, Hungary and Bulgaria, that is, these countries are the most affected by EP within the EU. Data according to Eurostat (2024) are also not positive for Slovakia. The Harmonized Index of Consumer Prices (hereinafter HICP) is a standardized indicator for evaluating inflation dynamics within EU member states. From July 2023 to December 2023, the Slovak Republic achieved the highest monthly inflation rate in the eurozone, based on HICP measurement. This result indicates that the growth rate of prices of goods and services in Slovakia in the given time period exceeded the growth rate of prices in other eurozone countries.

Although Vlačuha[30] states that there is an inverse relationship between the risk of poverty and age, but according to the EU — SILC 2023 statistics, individuals of retirement age were the least at risk of poverty at 8.10%, while the highest rate of poverty risk was registered by children under 17 years of age (22, 10%). In the breakdown by economic activity, the employed were followed by individuals of retirement age with 9.50%, while the unemployed were the most exposed to poverty (53.40%). The at-risk-of-poverty rate before social transfers, excluding old-age and survivors' benefits, was lowest for individuals of retirement age at 11.40%. Only before all social transfers, the group of individuals of retirement age was most at risk of poverty. Based on this data, we decided to include in our research, a sub-question focused on this area,

[28] S. Miháliková, E. Bútorová (eds.), *Starší ľudia medzi nami. Kde sme, kam smerujeme*, „Sociológia—Slovak Sociological Review" (2023) 55 Nr 3, pp. 370–374.

[29] A. Widuto, *Energy poverty in the EU*, European Parliamentary Research Service 2023, https://www.europarl.europa.eu/ (23.12.2023).

[30] R. Vlačuha, M. Kubala, *EU SILC 2023 Indikátory chudoby a sociálneho vylúčenia*, Bratislava 2023, Štatistický úrad SR, https://slovak.statistics.sk/ (21.12.2023).

to discover how pensioners themselves perceive the level of poverty risk after the pandemic and whether their opinions, subjective feelings coincide with the results of the EU — SILC 2022. This topic is very important and relevant for understanding contemporary society and the situation of the oldest generation in Slovakia. We analysed how the pandemic affected the risk of poverty among single pensioners, who undoubtedly, in our opinion, belong to the vulnerable groups exposed to the risk of poverty.

In Slovakia, there is a low rate of preventive programs in the fight against poverty among various population groups. Social distancing measures and lockdowns have contributed to increased feelings of isolation and loneliness, especially among the elderly and those living alone. Social services are required to maintain their mental health, eliminate poverty and provide emotional support.[31]

## 6. Conclusion

The impact of the pandemic on the risk of poverty of the citizens of the Slovak Republic is inevitably complex and affects many aspects of life. The conclusion of this analysis suggests that the economic and social consequences of the pandemic have caused an increased risk of poverty for some population groups. Unemployment, interrupted education, deteriorating working conditions and health insecurity have contributed to the vulnerability of many people. Government measures aimed at restoring the economy and providing social support can play a key role in mitigating the impact of the pandemic on poverty. It is important to create policies that ensure fair access to opportunities in order to minimize social inequalities. At the same time, it is necessary to pay attention to psychosocial health and the promotion of mental well-being, because long-term stress can have a negative effect on the ability of individuals to escape from poverty. Overall, there is a need to integrate different sectors of society, including public, private and non-profit organizations, to create a comprehensive and sustainable approach to addressing the risk of poverty. Church institutions can play an important role in this matter, including the 'socially significant' Roman Catholic Church in Slovakia, and in some regions of the country also the Greek

[31] L.L. Cintulová, Z. Budayová, S. Brédová, *Sociálna prevencia a príprava sociálnych pracovníkov v oblasti prevencie*, vysokoškolská učebnica, Bratislava 2022, Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety.

Catholic, Orthodox and Protestant Churches. This experience should serve as a lesson for the future and inspire the creation of more resilient societies that can face similar challenges with solidarity and effective measures.

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# The Basic Principles of Personalistic Pedagogy According to Joseph Ratzinger/ Benedict XVI

## Abstract

The rapid changes in the socio-cultural context of life and education of the young generation in Europe prompt contemporary educators to look for pedagogical trends that may be an inspiration for comprehensive education that rises to current challenges. The authors, therefore, refer to the relational concept of a person by Joseph Ratzinger and derive from it, the fundamental principles of personalistic pedagogy. In the first part of the paper, the basic terms related to the person and their upbringing will be outlined. The second part focuses upon chief educational difficulties; in the subsequent sections, they present the conditions of authentic upbringing and the assumptions of the education process presented by Joseph Ratzinger/Pope Benedict XVI.

## Keywords

J. Ratzinger, Benedict XVI, personalism, education

## 1. Personalism and education—terminological resolutions

Contemporary political, economic, social, cultural, religious, and existential contexts are particularly complex. Local factors related to human life and functioning in a specific place, merge with the increasing importance of global trends.[1] This results in significant difficulties in establishing essential pedagogical terms, as they acquire different meanings in various contexts, while global influences impose fluidity on many definitions, leading to them being blurred. Hence, even fundamental existential questions receive highly diversified answers: Who is a human being? What does a human being see as the meaning of his life? How does he define his relationships with others? What values does he live by? The multitude and diversity of responses contribute to the emergence of various pedagogical currents, including those that refer to the term 'personalism'. Their multiplicity and diversity often contribute to the loss of the essence of the term. Among these trends, are Thomistic, axiological, phenomenological, existential, idealistic, critical, absolutist, and neo-Thomistic. As Stanisław Kowalczyk observes, due to the analysis of the content of personalism, we should distinguish its several aspects: metaphysical, which emphasizes the personal nature of the essence of being; epistemological, which means that knowledge is expressed through personality; ethical, which stresses ethical experience, and theological, which refers to the concept of a personal God.[2] Each of the currents mentioned above underscores the exceptional value of the human person.[3]

Joseph Ratzinger/Pope Benedict XVI also referred to personalistic trends and developed his personalistic thinking based on relational personalism. Usually,

[1] Cf. J. Mariański, *Sekularyzacja i desekularyzacja w nowoczesnym świecie*, Lublin 2006, KUL; G. Rossiter, *Understanding the changing landscape of contemporary spirituality: A useful starting point for reviewing Catholic school religious education*, "The Person and the Challenges" 3 (2013) no 1, pp 157–179; E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, UPJPII.

[2] S. Kowalczyk, *Człowiek w myśli współczesnej. Filozofia współczesna o człowieku*, Michalineum, Warszawa 1990, p. 377.

[3] Cf. C. Bartnik, *Personalizm*, Lublin 1995, S. Michałowski, *Kategorie edukacyjne w pedagogii współbycia osobowego*, in: *Wychowanie chrześcijańskie. Między tradycją a współczesnością*, ed. A. Rynio, Lublin 2007, p. 192; S. Kowalczyk, *Człowiek w myśli współczesnej*, Warszawa 1990, p. 399–421; C. Strzeszewski, *Humanizm integralny J. Maritaina a Vaticanum II*, in: *Jacques Maritain prekursor soborowego humanizmu*, eds. S. Kowalczyk, E. Balawajder, Lublin 1992, pp. 183–189; *Świat osoby. Personalizm Czesława Bartnika,* eds. K. Guzowski, G. Barth, Lublin 2016.

as regards the development of his concept of a person, two main periods are distinguished. In the first one, there was the transition from substance to subsistence, that is, from a static understanding of a person and his essence (close to reism), to dynamic, historic-salvific, existential, with an emphasis on a person's existence. The second period involves the transition from subsistence to relation. Here, a person is not only an individual, but a relational individual.[4]

According to Joseph Ratzinger, a person does not exist in absolute singularity. Since the Absolute is a person, it is not singular. If something lacks or cannot have a relationship, it cannot be a person. Transcending singularity is inherent in the concept of a person.[5] This is evident in the very words from which this idea emerged: "The Greek word *prosopon* means literally 'look toward'; with the prefix '*pros*' (toward) it includes the notion of relatedness as an integral part of itself. It is the same with the Latin *persona*."[6] Thus, a human being obtains his personal identity through reference to others. Endowed with the ability to know, love, and freedom, a person resembles God, who is a communion of love. To understand the reasoning of Pope Benedict XVI, it is necessary to bear in mind that he views the person from a theological, and not purely philosophical, perspective. Christian revelation shows God, who is personal on the existential plane, not the substantial one. The Holy Trinity is the Communion of Divine Persons in one Divine Nature; it is self-contained, yet remains in relationships.[7]

J. Ratzinger was building on John Paul II's work on personalism[8], "The image of God means, first of all, that human beings cannot be closed in on themselves. Human beings who attempt to do this, betray themselves. To be the image of God implies relationality. It is the dynamic that sets the human being in motion towards the totally Other. Hence it means the capacity for relationship; it is the human capacity for God. Consequently, human beings are most profoundly human when they step out of themselves and become capable of addressing God on familiar terms. […] Therefore, the image of God also means that human persons are beings of word and of love, beings moving toward Another,

[4] Benedict XVI, *Świadkowie Chrystusa. Apostołowie i uczniowie*, Rosikon Press, Warszawa 2007, p. 22.

[5] J. Ratzinger, *Introduction to Christianity*, Ignatius Press, 2004, p. 184.

[6] J. Ratzinger, *Introduction…,* p. 180.

[7] Cf. J. Ratzinger, *Introduction…*, pp. 180–196.

[8] Cf. E. Osewska, B. Simonič, *A Civilization of Love according to John Paul II*, „The Person and the Challenges" 9 (2019) no 1, pp. 23–32.

oriented to giving themselves to the Other and only truly receiving themselves back in real self-giving."[9] Thus a human being, by his inherent nature, is a being directed "from" and "toward"—he needs to reach out to others.

In Ratzinger's relational concept of a person, a human being exists in reciprocal 'for', in a relation of a mutual gift that has a personal and community-building character. The gift means self-giving, it strengthens and shapes the bond between persons, as "we can only be saved—that is, become ourselves—when we engage in the proper relationship."[10] In his teaching, Joseph Ratzinger stresses that a human being becomes himself not by what he does, but by what he receives. He must, therefore, wait for the gift of love as he cannot receive love except as a gift. He cannot 'do' it himself. And one can become completely human only by being loved, by allowing oneself to be loved.[11]

The world in which we live proposes "to place a vain hope in the work of our own hands."[12] For we are self-sufficient and can create ourselves. Here, Joseph Ratzinger sees a great danger, for we know how to 'do' things, but we have forgotten how to 'be'. As he explains, we are aware of what can be 'made' of things and people, but we hardly speak of what these things are, what a human being truly is.[13] The rapid development of technology often leads to reducing human beings to mere cogs in economic and technological progress, as they must be subjected to the mechanisms of production or social engineering. Also, they become an easy target in the games of various strategies and ideologies.

According to the Chrurch's social doctrine a human being exists 'for' and is endowed with the ability to know, love, and be free. But Benedict XVI is also aware of the ways in which love has been misconstrued, misinterpreted and undervalued,[14] because a human being is to grow in a world full of tension, fear, and "post-truth". Ideologies are constantly invented by people who promise many

[9] J. Ratzinger, *'In the Beginning…' A Catholic Understanding of the Story of Creation and the Fall*, trans. Boniface Ramsey, O.P., William B. Eerdmans Publishing Company, Grand Rapids, Michigan, 1995, pp. 47–48.

[10] J. Ratzinger, *'In the Beginning…'*, p. 73.

[11] Cf. J. Ratzinger, *Introduction…*, p. 272.

[12] *Message of His Holiness Benedict XVI for Lent 2006*, *"Jesus, at the sight of the crowds, was moved with pity"* (Mt 9:36), https://www.vatican.va/content/benedict-xvi/en/messages/lent/documents/hf_ben-xvi_mes_20050929_lent-2006.html (12.04.2024).

[13] Cf. J. Ratzinger, *To Look on Christ: Exercises in Faith, Hope, and Love*, Crossroad Publishing Company, New York 1991.

[14] Cf. *Caritas in Veritatae* 2.

things, but primarily care for their good and reject what constitutes the essence of being human. That is why these ideologies become a prison for humanity. For it is hard to refer to the dignity of human, to protect and respect it, if a human being is reduced solely to few dimensions, subjected to the influence of global corporations, dependent upon the decisions of politicians and imposed cultural patterns. This dramatic situation results from the formation of socio-cultural life based on a false understanding of the essence of person. From the point of view of Christian personalism, the view characteristic of the exact sciences is particularly dangerous: it states that a human being is an accidental specimen of the biocosmos evolution. In the field of social sciences man is reduced to a social construct, a semantic creation of cultural narratives.[15]

In contemporary reality, one is faced with a strong "*attempt to promote a vision of man apart from God and apart from Christ*. This sort of thinking has led to man being considered as 'the absolute center of reality, a view which makes him occupy—falsely—the place of God and which forgets that it is not man who creates God, but rather God who creates man. Forgetfulness of God led to the abandonment of man.' It is therefore 'no wonder that in this context a vast field has opened for the unrestrained development of nihilism in philosophy, of relativism in values and morality, and of pragmatism—and even a cynical hedonism—in daily life'. European culture gives the impression of 'silent apostasy' on the part of people who have all that they need and who live as if God does not exist."[16] Bearing this in mind, can we seek hope for a human being, his life, growth, and education?[17] Can we expect that the approach to human suddenly changes?

Every human being needs to be educated, especially in the face of the diversity and multitude of ideologies, philosophies of life, and ideas about life. They make it difficult to see the goal and meaning of our lives clearly. Benedict XVI spoke about this urgent need for education in his Letter to the Roman Diocese issued in 2008: "It is impossible not to be concerned about the formation of the

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[15] Cf. S. Kowalczyk, *Ciało człowieka w refleksji filozoficznej*, Lublin 2009, KUL, pp. 9–122.

[16] *Post-Synodal Apostolic Exhortation Ecclesia in Europa of His Holiness Pope John Paul II to the Bishops, Men and Women in the Consecrated Life and All the Lay Faithful on Jesus Christ Alive in His Church, the Source of Hope for Europe*, p. 9, https://www.vatican.va/content/john-paul-ii/en/apost_exhortations/documents/hf_jp-ii_exh_20030628_ecclesia-in-europa.html (11.04.2024).

[17] Cf. *Wychowanie chrześcijańskie. Między tradycją a współczesnością*, ed. A. Rynio, Lublin 2007, KUL.

new generations, about their ability to give their lives a direction and to discern good from evil, and about their health, not only physical but also moral. Educating, however, has never been an easy task and today seems to be becoming ever more difficult."[18] It is, therefore, legitimate here to ask the question: what is education? Academic disciplines define it in various ways, addressing its scope, underlying disciplines, character, significance, and functions in man's life. Undoubtedly, education is a dynamic reality directed toward the growth of man. It requires effort, taking action, and transitioning from positive longings to realization, from one's developmental good seen from the future perspective to its realization.[19]

Pope Benedict XVI saw the changes in the socio-cultural sphere, such as the increasing attitude of laissez-aller, the decline of authorities, individualism, subjectivism, the wavering of universal values hierarchy, the marginalization of Christianity, consumerism, the cult of the body, and others. That is why he pointed to the emergency of education and cautioned educators against the temptation to give up or refrain from educational activities.[20] As he explained, "We all have at heart the good of the people we love, especially our children, adolescents, and young people."[21]

In his eyes, the growth of children and youth is an urgent challenge and a priority that should be put into practice by educators. Therefore, he emphasized three crucial aspects of education:

1. Education requires that a human being is treated as a person (attitude, behavior, transformation);
2. A human being should be perceived through the prism of his ontological relation with God who revealed Himself in Jesus Christ;
3. The integrity of education, with particular emphasis on the formation of conscience.[22]

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[18] *Letter of His Holiness Benedict XVI to the Faithful of the Diocese and City of Rome on the Urgent Task of Educating Young People*, https://www.vatican.va/content/benedict-xvi/en/letters/2008/documents/hf_ben-xvi_let_20080121_educazione.html (11.04.2024).

[19] Cf. M. Nowak, *Teorie i koncepcje wychowania*, Warszawa 2008, Wydawnictwa Akademickie i Profesjonalne, pp. 178–181.

[20] Benedict XVI, *Letter*…

[21] Benedict XVI, *Letter*…

[22] M. Górecka, *Pedagogia Boża wobec kryzysu wychowawczego w ujęciu Benedicta XVI*, "Niedziela ogólnopolska" 36 (2023), p. 69.

The concept 'integrity of education' came to dominate the language of Catholic education since Vatican Council II, but J. Ratzinger links strongly this idea with personalism and christocentrism. Benedict XVI was deeply worried about the educational crisis, because he saw a dichotomy developed between the education based on a cognitive emphasis and the integral education. While adopting the Pope's idea that education should treat a human being as a subject, and should have a Christological dimension and integrity, it is also worth noting the contemporary difficulties regarding education.

## 2. The various difficulties of contemporary educators

It is difficult to determine unequivocally who or what is at the root of the crisis in education. Also, why so many difficulties in the process of education are encountered by all those involved in education, including parents, caregivers, and teachers? The individualism, subjectivism, relativism, emotivism, and irrationalism propagated by postmodernity, lead to a resignation from presenting and formulating universal truths and classical educational principles.[23] Examining the situation, Benedict XVI identified two main threats inherent in educators themselves. The first is the temptation to "give up", to refrain from the efforts of education, and to abandon the search for solutions. That is why educators often withdraw from fulfilling these tasks, even if they see that they would be right. Moreover, sometimes they do not even undertake them. In this way, they conform to societal acceptance of the arbitrary behavior of the pupil and axiological chaos. The second threat that refers to educators themselves is "the risk of not even understanding what their role or rather the mission entrusted to them is."[24] Education is sometimes treated as the fulfillment of professional obligations written in work regulations—it does not entail one's commitment or responsibility. And yet, education requires personal and religious maturity from educators. Without it, they merely execute directives of educational policy.

An educator needs to understand who the pupil is. For a given mode of education will largely depend upon the adoption of a specific concept of human nature stemming from philosophical currents and political assumptions. The main tendencies in educational currents have arisen in relation to political, social,

[23] Cf. *Caritas in Veritatae* 21–33.

[24] Benedict XVI, *Letter*…

and cultural life. They have been expressed in three streams of pedagogical thought: the personalistic current, which is usually put forward by Christian democracy parties; the Marxist current, found in socialism and communism, and the secularist/liberal current, which is close to liberal-socialist and social-democratic powers. It can be assumed that these currents are based on three basic categories: personalistic refers to the category of "the person," Marxist emphasizes the category of "practice," while secularist stresses "secularity."[25]

If educators are not mature, if they do not accept the basic anthropological principles, do not understand the present context of education and are not convinced that what they do is right, then, as the result, the contemporary mentality and culture prevail "which induce one to have doubts about the value of the human person, about the very meaning of truth and good, and ultimately about the goodness of life."[26]

"There is a growing mentality of relativism, which holds that everything is equally valid, that truth and absolute points of reference do not exist."[27] What remains important is only what can be experienced and calculated, and individual freedom (mistakenly understood as unlimited autonomy), becomes the highest value to which all other values are to be subordinated.[28] "It then becomes difficult to pass on from one generation to the next, something that is valid and certain, rules of conduct, credible objectives around which to build life itself."[29] However, one may still be optimistic for "none of these difficulties is insurmountable. They are, as it were, the other side of the coin of that great and precious gift which is our freedom, with the responsibility that rightly goes with it. As opposed to what happens in the technical or financial fields, where today's advances can be added to those of the past, no similar accumulation is possible in the area of people's formation and moral growth, because the person's freedom is ever new. As a result, each person and each generation must

[25] Cf. M. Nowak, *Podstawy pedagogiki otwartej. Ujęcie dynamiczne w inspiracji chrześcijańskiej*, Lublin 1999, pp. 230–265.

[26] Benedict XVI, *Letter…*

[27] *Message of His Holiness Pope Benedict XVI For the Twenty-Sixth World Youth Day (2011).* https://www.vatican.va/content/benedict-xvi/en/messages/youth/documents/hf_ben-xvi_mes_20100806_youth.html (12.04.2024).

[28] *Address of His Holiness Benedict XVI to the Participants in the Convention*, Verona https://www.vatican.va/content/benedict-xvi/en/speeches/2006/october/documents/hf_ben-xvi_spe_20061019_convegno-verona.html (16.04.2024).

[29] Benedict XVI, *Letter…*

make his own decision anew, alone. Not even the greatest values of the past can be simply inherited; they must be claimed by us and renewed through an often anguishing personal option."[30] That is why education is crucial. And just like human is endowed with dignity, so is education. While he was addressing the professors and educators at the Catholic University of America on 17t April 2008, the Pope said that the dignity of education consists in striving for the true excellence and happiness of those under care.[31]

With regard to the educators who carry formation of young generation, Benedict XVI uderlines: "Faith, hope and charity go together. Hope is practised through the virtue of patience, which continues to do good even in the face of apparent failure, and through the virtue of humility, which accepts God's mystery and trusts him even at times of darkness. Faith tells us that God has given his Son for our sakes and gives us the victorious certainty that it is really true: God is love! … Faith, which sees the love of God revealed in the pierced heart of Jesus on the Cross, gives rise to love. Love is the lightand in — the end, the only light—that can always illuminate a world grown dim and give us the courage needed to keep living and working. Love is possible, and we are able to practise it because we are created in the image of God".[32] An educator, teacher, pedagogue therefore, is faced with a person and not some 'material' to be formed freely in love, hope and faith. That is why education should aim toward the future developmental good of the pupil, so that he realizes his potentiality, shapes his will, and grows as "a unique person", both on the individual and social planes. The question is, however, what the basic conditions and principles of education in pedagogical activity are.

## 3. Conditions of authentic education

The radical changes in contemporary context of education does require the search for answers to questions about the nature of the human being, his or her dignity and the correct process of education. The style and pace of life in contemporary, postmodern societies has changed the way that many people, especially

[30] Benedict XVI, *Letter*…

[31] *Address of His Holiness Benedict XVI, Conference Hall of the Catholic University of America in Washington, D.C, 17 April 2008*, https://www.vatican.va/content/benedict-xvi/en/speeches/2008/april/documents/hf_ben-xvi_spe_20080417_cath-univ-washington.html (12.04.2024).

[32] *Deus Caritas Est* 39.

youth relate to meanings, virtues and the purposes of life. Young people may pay little attention to deeper questions because its meanings seem to have little connection with their everyday living.[33] In order to help children and young people to achieve personal and religious maturity, educators need to meet the conditions proposed by Pope Benedict XVI, in his *Letter to the Diocese of Rome on the urgent task of education.*

The first of these conditions is to get up close and personal, to show trust, which is born from love. Building a lasting bond with the child requires dedication and commitment. The first years of a child's life seem to be the most vital. For during this time, their growth, conditioned by the quality and frequency of sensory experiences from the surrounding environment, both objective and subjective (the mother and father), may progress correctly. Consequently, a bond of closeness will naturally form. That is why, Pope Benedict XVI appeals to parents to always remain in "reciprocal love". As he explains, "this is the first great gift your children need if they are to grow up serene, acquire self-confidence and thus learn to be capable in turn of authentic and generous love. Further, your love for your children must endow you with the style and courage of a true educator, with a consistent witness of life and the necessary firmness to temper the character of the new generations, helping them to distinguish clearly between good and evil so they in turn can form solid rules of life that will sustain them in future trials."[34] Closeness and trust result from love, and parental love should be selfless, seeking to give rather than take. Love means longing for good—both external and internal. The former is "mere decency, honesty or social utility of a person—the substance of his so-called moral backbone."[35] The latter, however, is "the happiness of a person—it is the internal feeling that life is meaningful and that one wants to live."[36] Therefore, a parent or teacher "knows that if he is to educate he must give a part of himself, and that it is only in this way that he can help his pupils overcome selfishness and become in their turn capable of authentic love."[37] We can now see what a difficult task parents

[33] Cf. G. Rossiter, *Religious education and the changing landscape of spirituality: Through the lens of change in cultural meanings*, "Journal of Religious Education" 55 (2010) 2.

[34] Benedict XVI, Letter …

[35] J. Chmielewski, *Wychowanie do szczęścia*, "Edukacja i Dialog" (2004), no. 10, p. 2.

[36] J. Chmielewski, *Wychowanie do szczęścia*, p. 2.

[37] Benedict XVI, *Letter*…

and educators face: to raise children out of love, in love and toward love. It is both a gift and a mission.

The capacity for loving is strongly connected with the capacity for suffering, inscribed in our life. In his encyclical *Spe salvi*, Benedict XVI explains that the measure of one's humanity is determined in relation to suffering and the one who suffers. Accepting the one who suffers means that we somehow take on his suffering. This is expressed in the Latin term *con-solatio*, "to be together" so that the one who suffers does not feel alone. Thus, love is realized which cannot exist without self-sacrifice. Otherwise, a man becomes an egoist and denies love.[38] The Pope explains the essence of Christian love and notes that a person is not loved because of this or that trait. One loves the other who manifests himself through various qualities, but is always more than the sum of them. One loves the other the way he is, along with his weaknesses.[39]

Another condition for education to be authentic is finding a balance between freedom and discipline. As the Pope explains, "If no standard of behavior and rule of life is applied even in small daily matters, the character is not formed and the person will not be ready to face the trials that will come in the future."[40] To educate well means to instruct on how to use freedom. But what is freedom according to Benedict XVI? On the occasion of the XX World Youth Day, the Pope said that "freedom is not simply about enjoying life in total autonomy, but rather about living by the measure of truth and goodness so that we ourselves can become true and good. This gesture is necessary even if initially our yearning for freedom makes us inclined to resist it."[41] Those who educate "must therefore accept the risk of freedom and be constantly attentive in order to help him [the pupil] to correct wrong ideas and choices."[42] But we, as educators, must never refrain from reacting when we see that our pupil errs, "to pretend we do not see the errors or worse, that we share them as if they were the new boundaries

[38] *Encyclical Letter* Spe Salvi *of the Supreme Pontiff Benedict XVI to the Bishops, Priests and Deacons, Men and Women Religious and All the Lay Faithful on Christian Hope.*

[39] Cf. J. Ratzinger, *To Look on Christ*…

[40] Benedict XVI, *Letter*…

[41] *Homily of His Holiness Pope Benedict XVI, Cologne-Marienfeld, 21st of August 2005*; https://www.vatican.va/content/benedict-xvi/en/homilies/2005/documents/hf_ben-xvi_hom_20050821_20th-world-youth-day.html (11.04.2024).

[42] Benedict XVI, *Letter*…

of human progress."[43] We must not forget that the educational relationship, sometimes very difficult, is the encounter of two kinds of freedom, and education itself is a process in which a man's freedom is shaped.

In the process of education, the authority of the educator is crucial. It is "the fruit of experience and competence, but is acquired above all with the coherence of one's own life and personal involvement, an expression of true love."[44] Due to his sincere actions for the benefit of the pupil, living in line with the adopted norms and principles, competence and experience, an educator is "a witness of truth and goodness. He too, of course, is fragile and can be mistaken, but he will constantly endeavor to be in tune with his mission."[45]

Responsibility is yet another condition for authentic education. In the teaching of Benedict XVI, there are three kinds of responsibility. First, we have a responsibility before ourselves, that is, personal. There is also a social responsibility, for we live among other people and through our actions, choices, and words, we influence the entire community.[46] If we are believers, we recognize our responsibility before God. Responsibility requires one's effort, consistency, and keeping one's word.

This educational striving should be accompanied by unwavering hope, which Benedict XVI calls "the soul of education". When placed in God, hope gives support in moments of weakness, it prompts one to act and give a sense of strength, due to the value of the goal one has chosen. "Hope that is addressed to God is never hope for oneself alone, it is always also hope for others; it does not isolate us but renders us supportive in goodness and encourages us to educate one another in truth and in love."[47] Christians are people of hope. However, "our hope is threatened on many sides and we even risk becoming, like the ancient pagans, people 'having no hope and without God in the world' […]. What may be the deepest difficulty for a true educational endeavour consists precisely in this: the fact that at the root of the crisis of education lies a crisis of trust in life."[48] The goal of Christian hope is, therefore, the gift of love that goes beyond what we can

[43] Benedict XVI, *Letter*…

[44] Benedict XVI, *Letter*…

[45] Benedict XVI, *Letter*…

[46] Cf. Benedict XVI, *Letter*…

[47] Benedict XVI, *Letter*…

[48] Benedict XVI, *Letter*…

do; one that we cannot force, and which is fundamental for us. Our hope tells us that our longing for infinity is not in vain.[49]

The above-mentioned points allow us to outline an integral theory of education based on Joseph Ratzinger/Pope Benedict XVI foundations. Among the most vital traits of the Pope's model of education, there are:

1. Subjectivity which entails the awareness of one's place in the world, and the ability to create one's own life. It confirms that education is about a subject that is always unique;
2. Educational relation, that takes into account the subjectivity of the educator and the pupil;
3. Integrity, understood as the growth of the entire person. It encompasses his physical, mental, social, spiritual, and religious life;
4. Relationality, that is, our being "for", the ability to reach out to the Other, to know and to love; the ability to be a gift;
5. Educational optimism, that "makes" us overcome difficulties through the proper use of freedom and responsibility. It manifests itself in one's readiness to help correct erroneous choices;
6. Education out of love, in love, and toward love;
7. Recognition of the authority of the educator who, through wisdom, competence, and commitment, engages in the process of education;
8. The educator who can bear witness to the values/virtues he has adopted;
9. Balance between freedom and discipline in line with one's developmental processes;
10. Educational awareness and responsibility for the educational process (personal responsibility; responsibility before society and God);
11. The principle of hope, that makes it possible to overcome obstacles that arise from the current socio-cultural context;
12. Adopting Christian realism which asserts that education is not only about a relationship between people, but also a relationship with God, who confirms the reliability of His promises thereby affirming our capacity to attain humanity and sanctity.

In a time of social, cultural, and spiritual confusion, Benedict XVI explains the profound significance of the Incarnation, Life, Passion, and Resurrection of Jesus, for good is stronger than evil. As he writes, "When the foundations are shaken, however, and essential certainties are lacking, the impelling need for

[49] Cf. J. Ratzinger, *To Look on Christ*…

those values once again makes itself felt: thus today, the request for an education which is truly such is in fact increasing. Parents, anxious and often anguished about the future of their children, are asking for it; a great many teachers going through the sorrowful experience of their schools' deterioration are asking for it; society overall, seeing doubts cast on the very foundations of coexistence, is asking for it; children and young people themselves who do not want to be left to face life's challenges on their own are also asking for it in their inmost being. Those who believe in Jesus Christ, moreover, have a further and stronger reason for not being afraid: they know in fact that God does not abandon us, that his love reaches us wherever we are and just as we are, in our wretchedness and weakness, to offer us a new possibility of good."[50]

## 4. Conclusion

There is no simple guarantee that the proposals given above will solve alle the problems of contemporary education, but the basic principles of personalistic pedagogy given by Cardinal Joseph Ratzinger / Pope Benedict XVI lead to pedagogy of hope and is helpful to see new orientation of education and pedagogy. At the anthropological level, Benedict XVI highlits the dignity of human being and his/her relationships with Jesus Christ, other persons and himelf/herself. Pope Benedict XVI points to pedagogy in truth, love, closeness, trust, freedom, and discipline, at the same time emphasizing the significance of the educator's authority. A person and his comprehensive growth are the subject of education. To educate well, therefore, one must know who a human being is, and what his nature is.[51] At the same time, one must remember the relationship of this person with others, including God. It is then that a man is not closed within himself but has a chance to grow fully.

[50] Benedict XVI, *Letter*…

[51] Cf. *Address of His Holiness Benedict XVI to the Bishops of the United States of America on their 'Ad limina' visit,* 19th January 2012, https://www.vatican.va/content/benedict-xvi/en/speeches/2012/january/documents/hf_ben-xvi_spe_20120119_bishops-usa.html (11.04.2024).

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# Parental and Teacher Perspectives on Children's Use of the Internet

## Abstract

As a result of the COVID-19 pandemic, the use of technology and the internet was highlighted when teachers were encouraged to prepare teaching materials, so that online classes could be conducted smoothly and children`s education could continue. This form of teaching and activities, as well as isolation itself, resulted in children spending hours in front of the screen. The paper will present the results of a survey of the opinions of teachers (N=43) and parents of school-age children (N=55), regarding the habits, benefits and dangers of using the internet by children in the lower grades of elementary school. Descriptive and frequency analysis, as well as z-test and t-test, were used to process the obtained data in order to determine whether there is a difference in the opinion of teachers and parents about the forms of the child's use of the internet, the benefits and safety of using the internet.

## Keywords

teacher, parent, child, internet, dangers

## 1. Introduction

Today, children use the internet for building friendships, entertainment, learning, and acquiring new knowledge and skills. The COVID-19 pandemic has emphasized the importance of using technology in education. Teachers had to use various digital tools to ensure the continuity of the educational process. This contributed to an increase in the time children spent in the virtual world. Moreover, the child's inability to distinguish the inner and outer world is an incentive for parents and teachers to raise children's awareness of the importance of safe internet use. It is necessary to explain to the child that, if he sees or receives some inappropriate and disturbing online, he should share this information with his parents and teachers. Children must realize that their interests are understood and valued, but for reasons of their safety and protection against possible malicious attempts to access their personal data, they need to share information about the content they follow.

## 2. The Role of Parents and Teachers in Protecting the Child while Using the Internet

The digital age has brought numerous advantages and challenges, bringing forward new and interesting learning and communication tools for children. However, there are certain risks present, and parents and teachers play a key role in protecting child's rights in an online environment, in particular, privacy and the safe acquisition of new knowledge and skills.

Parents of children in the lower grades of elementary school are aware of the educational potential offered by the internet: children can explore new worlds, acquire knowledge, gain new insights, awaken their creativity and curiosity. According to parents, the internet offers interactive forms of learning and virtual forms of communication that are attractive and useful to children.

Rapidly developing, the digital technology has greatly changed the way children and adults communicate and behave. Parents' role today becomes more complex: although the internet makes everyday life easier for individuals, parents need to be careful and monitor children's online activities. As much as the internet has made life easier for an individual, the dangers lurking on it are just as pronounced.[1]

[1] N. Ružić, *Zaštita djece na internetu*, "Nova prisutnost" 9 (2020), pp. 155–169.

Protecting a child from inappropriate online content is a continuing challenge for parents that requires effective parental control. Encouraging open communication between children, parents and teachers about the child's activities on the internet, and teaching children about online safety, are important forms of child protection.

For parents to adequately teach their child how to use the internet, it is necessary to make them aware of the advantages and disadvantages. The results of a survey conducted in the United Kingdom showed that half of parents believe that using the internet has more advantages than disadvantages, while the other half solicited advice on how to protect the child during the process of using the internet.[2]

It is essential that the parent monitors the child's online activities, provide guidance on how to safely use internet resources, and create an environment in which the child will feel comfortable sharing their online experience. There are different forms of parental mediation in the child's activities on the internet: active mediation, mediation that includes setting certain rules, simply monitoring the child's activities, and setting technical restrictions.[3] There is no definitive conclusion as to which method is more effective, but authors emphasize that parental involvement in the child's activities on the internet can affect the number of risky situations that the child encounters.

Teachers are aware of the value of the internet and digital technology in the child's knowledge acquisition and communication with the environment, as well as the dangers and challenges it poses to the child. For the benefit and safety of the child, the teacher should apply proactive protective measures. In addition to the dangers that internet use can pose to a child, teachers are aware of various resources aimed at awakening the child's educational potential. Online platforms which are accessible to children can encourage learning and develop individual potential and digital competencies.

By using the internet, children may be exposed to inappropriate content, privacy violations, cyberbullying, and various forms of threats that can negatively affect their socio-emotional development. Therefore, the moral role of the teacher is to instruct the child with respect to the knowledge and skills on how

[2] Office of Communications. Children and parents: media use and attitudes report 2019. (2020), https://www.ofcom.org.uk/__data/assets/pdf_file/0023/190616/children-media-use-attitudes-2019-report.pdf (03.09.2023).

[3] T. Velki and I. Letica Borić, *Rizična ponašanja djece i mladih na internetu*, in: T. Velki and K. Šolić (eds.), *Izazovi digitalnog svijeta*, Osijek 2019, J. J. Strossmayer University in Osijek, pp. 61–98.

to safely use the internet in an appropriate and timely manner. Implementing digital literacy within the curriculum emphasises the need for developing digital competencies from an early school age, alongside with the online safety that continues to be less represented. With critical thinking as one of the fundamental curriculum values, the teacher's role is to teach the child how to critically evaluate the information obtained, recognize reliable sources, and protect personal data. Educating a child to become a digitally competent citizen builds the foundations of an individual's ethically responsible behavior on the internet.

## 2.1. Cooperation between parents and teachers

The cooperation of parents and teachers is necessary, as it establishes a unique approach to developing and building student safety while using the internet, alongside with the involvement of pedagogues and psychologist, since they can provide the child with the additional necessary support. In order to prevent the appearance of inappropriate content when using school online resources, IT support in content filters, monitoring software and a secure communication platform are required. These resources enable the creation of a safe ecosystem within the jurisdiction of the school. Building trust between students and teachers creates a pleasant atmosphere that encourages mutual dialogue during which students present their online experiences, questions and concerns. This can lead to reporting of online abuse or suspicious online encounters, empowering the student to take control of his virtual activity.

By implementing digital literacy and internet security in the school curriculum, encouraging cooperation between teachers and parents, and creating a safe and open space for communication, students develop the knowledge, skills and abilities necessary for safe living in the virtual world. Cooperation between teachers and parents is crucial in protecting children while using the internet, as it ensures the overall safety of the child's internet use.

## 3. Methodology

This paper will present the results of research regarding the opinions of parents and teachers about the forms of their use of the internet, about the online activities of a child from their family/class, as well as the competences of monitoring

and protecting a child from their family/class while using the internet. For the purposes of the research, the questionnaire *Behaviour and habits of children on the Internet: attitudes of children, parents and teachers* was modified.[4] From the existing *Questionnaire for teachers*, out of twenty scales, those related to personal use of the Internet, friendship with a child from the class on a social network, frequency of the child's use of the internet, forms of the child's use of the internet, personal information of the teacher about violence against children when using the internet were taken and negative behaviors of children in relation to other children while using the internet. The same questionnaire was used for parents and teachers.

The adapted questionnaire contained an explanation of the purpose of the research; independent variables (gender, age and level of education), and closed-ended questions about the forms of personal use of the internet and modern technology by parents and teachers, as well as the child's forms of use of the internet and modern technology. Research participants expressed their opinion through dichotomous answers (YES/NO) to the statements offered. On the scale for assessing the opinion of the research participants on the *Advantages of the internet for children* (k=8) and the *Dangers of using internet for children* (k=8), the research participants had the option of a five-point Likert scale, ranging from completely disagree (1) to completely agree (5) to express the degree of their own assessment of the importance of the statement.

The reliability of the instrument was confirmed using the Cronbach alpha test $\alpha$=0.86.

Frequency analysis of data, t-test and z-test of proportions were used to process the data obtained from the research in order to determine whether there is a difference in the percentage of opinions of parents and teachers in relation to a particular statement.

The research goal was to examine the opinions of parents and teachers in lower grades of elementary school with respect to personal IT competences as a significant factor in the supervision of children's safe use of the internet.

In accordance with the aim of the research, the following hypotheses were set:

H1: There is no statistically significant difference in the opinion of parents and teachers about the forms of their use of the internet.

[4] E. Muratbegović, S. Vujović, *Ponašanje i navike djece na internetu: stavovi djece, roditelja i nastavnika informatike,* Sarajevo 2016, Save the Children in North West Balkans.

H2: There is no statistically significant difference in the personal use of social networks between parents and teachers.
H3: There is no difference in the opinion of parents and teachers about the frequency and forms of children's/students' access to the internet.
H4: There is no statistically significant difference in the opinion of teachers and parents regarding the advantage of using the internet for children.
H5: There is no statistically significant difference in the opinion of teachers and parents regarding the dangers of using the internet for children.

Primary school teachers and parents from Zadar County participated in the research. After processing the results of the survey, the relevance of the questionnaire data was determined for teachers (N=43) and parents (N=55).

## 4. Interpretation of results and discussion

**Table 1**. Descriptive statistics

| CLAIMS | | TEACHERS | | PARENTS | |
|---|---|---|---|---|---|
| | | f | % | f | % |
| Your gender is? | Male | 1 | 2.3 | 7 | 12.7 |
| | Female | 42 | 97.7 | 47 | 85.5 |
| | Prefer not to say | 0 | 0 | 1 | 1.8 |
| What is your level education? | Professional degree | 11 | 25.6 | 7 | 12.7 |
| | Master's degree | 30 | 69.8 | 9 | 16.4 |
| | Other | 2 | 4.6 | 39 | 70.9 |

Table 1. shows that the majority of teachers were women (97.7%), similar to the number of female parents (85.5%), while a small percentage of participants (1.8%) preferred not to state their gender. The majority of research participants from the population of teachers have higher levels of education (25.6% have a professional degree, and 69.8% have a master's degree). The majority of parents (70.9%) belong to the other category (secondary education and unqualified).

**Table 2**. Forms and frequency of internet use by research participants

| CLAIMS | | | PARENTS | | TEACHERS | | z-test | p |
|---|---|---|---|---|---|---|---|---|
| | | | f | % | f | % | | |
| Do you use the internet and modern technology? | Do you use the internet? | yes | 52 | 94.5 | 43 | 100 | –1.555 | 0.118 |
| | | no | 3 | 5.5 | 0 | 0 | | |
| | Do you use a computer/ laptop in your daily life and work? | yes | 36 | 65.5 | 42 | 97.7 | –3.927 | 0.000 |
| | | no | 19 | 34.5 | 1 | 2.3 | | |
| | Do you have mobile internet? | yes | 53 | 96.4 | 41 | 95.3 | 0.252 | 0.802 |
| | | no | 2 | 3.6 | 2 | 4.7 | | |
| How often do you use the internet? | I access the internet every day | yes | 49 | 89.1 | 42 | 97.7 | –1.637 | 0.101 |
| | | no | 0 | 0 | 0 | 0 | | |
| | Once a week | yes | 3 | 7.3 | 0 | 0 | – | |
| | | no | 0 | 0 | 0 | 0 | | |
| | Several times a week | yes | 2 | 3.6 | 1 | 2.3 | – | |
| | | no | 0 | 0 | 0 | 0 | | |
| Where do you use the internet? | At my work place | yes | 35 | 63.6 | 42 | 97.7 | –4.075 | 0.000 |
| | | no | 20 | 36.4 | 1 | 2.3 | | |
| | At friend's | yes | 13 | 23.6 | 14 | 32.6 | 0.098 | 0.327 |
| | | no | 42 | 76.4 | 19 | 44.2 | | |
| | At the bar | yes | 31 | 56.4 | 18 | 41.9 | –1.424 | 0.155 |
| | | no | 24 | 43.6 | 14 | 32.6 | | |

From the results shown in Table 2, it is evident that almost all teachers use the internet and mobile internet, as well as a computer/laptop in their daily life and work. A large percentage of parents use the internet and mobile internet (over 95%), while slightly more than average (65.5%) make use of a computer/ laptop in their daily life and work. The results show that parents and teachers access the internet every day. However, there is a difference in the location of internet use between teachers and parents. Applying the z-test, it is observed that there is a statistically significant difference ($z= -3, 927$; $p<0,000$) in the use of the internet between teachers and parents in everyday life and work. It can be concluded that teachers use the internet more in everyday life and at the

workplace than parents. Also, there is a statistically significant difference (z= –4,075; p<0,000) in the location of internet use between teachers and parents. These results suggest that teachers and parents are active users of the internet and modern technology, but there is a difference in their use of computers/ laptops in everyday life and work, as well as the location of use. Differences in their use in the forms and locations of internet use may imply a difference in opinion and attitude about the safety of children and their use of the internet.

**Table 3**. Personal use of social networks by parents and teachers

| CLAIMS | | PARENTS | | TEACHERS | | z-test | p |
|---|---|---|---|---|---|---|---|
| | | f | % | F | % | | |
| Do you have a social network profile? (Facebook, Instagram, Twitter) | yes | 49 | 89.1 | 32 | 74.4 | 1.903 | 0.057 |
| | no | 6 | 10.9 | 11 | 25.6 | | |
| My child /A child from my class is my friend on a social network | yes | 27 | 49.1 | 2 | 4.7 | 4.782 | 0.000 |
| | no | 28 | 50.9 | 38 | 94.1 | | |
| My child/Child in the class is not in my social networks friends list. but I occasionally follow his activities on social networks | yes | 32 | 58.2 | 12 | 27.9 | 2.990 | 0.002 |
| | no | 23 | 41.8 | 25 | 58.2 | | |
| I monitor the activity of my child/children from the class, on the Internet in a different way. | yes | 10 | 19.6 | 11 | 25.6 | –0.088 | 0.373 |
| | no | 40 | 80.4 | 24 | 55.8 | | |

Table 3. shows that most teachers and parents have a profile on a social network. Although there is a difference between teachers and parents in the percentage of having profiles on social networks, it is not statistically significant. Using the z-test, a statistically significant difference between teachers and parents is visible in relation to the statement *My child /A child from my class is my friend on the social network* (z=4,782; p<0,000). Also, a statistically significant difference was found between teachers and parents in relation to the statement *My child/ The child from the class is not among my friends*

*on the social networks I use, but I occasionally follow his activities on social networks* (z=2.990; p=0.002). Parents, regardless of whether they are not friends with the child on the social network, find a way to monitor the child's activities, so they can promptly protect him from possible cyberbullying. Therefore, parents are more often friends with the child on the social network and follow his activities, which is also consistent with the role they play in the child's life.

**Table 4**. How often does a child from your class/your child access the internet?

| CLAIMS | TEACHERS | | PARENTS | |
|---|---|---|---|---|
| | f | % | f | % |
| He never accesses the Internet | 2 | 4.7 | 4 | 7.3 |
| He accesses the internet every day | 33 | 76.7 | 42 | 76.4 |
| He accesses the internet once a week | 2 | 4.7 | 0 | 0 |
| Several times a week | 6 | 14.0 | 9 | 16.4 |
| Once a month or less often | 0 | 0 | 0 | 0 |
| Total | 43 | 100.0 | 55 | 100 |

Table 4. shows that most teachers and parents feel that children access the internet daily. According to the data, it can be observed that neither teachers nor parents are of the opinion that children access the internet once a month. Moreover, there is also a small percentage of children who do not access the internet at all. Based on the results, it can be concluded that children access the internet on a daily basis, which implies the need to educate not only children about the safe use of the internet, but also their parents and teachers, due to the advances in digital technology.

Livingston et al.[5] also found that 93% of children access internet every day. Research shows that children spend an average of one hour a day on the internet.

[5] S. Livingstone, L. Haddon, A. Görzig, K. Ólafsson, *Risks and safety on the internet: the perspective of European children: full findings and policy implications from the EU Kids Online survey of 9–16 year olds and their parents in 25 countries*, London 2011, EU Kids Online Network, London, UK.

**Table 5**. A child from your class / Your child uses the internet for the following activities

| CLAIMS | | TEACHER | | PARENTS | |
|---|---|---|---|---|---|
| | | f | % | f | % |
| Search for interesting content | Never | 1 | 2.3 | 3 | 5.5 |
| | Sometimes | 30 | 69.8 | 27 | 49.1 |
| | Often | 11 | 25.6 | 25 | 45.5 |
| Communication with friends | Never | 3 | 7.0 | 4 | 7.3 |
| | Sometimes | 15 | 34.9 | 26 | 47.3 |
| | Often | 24 | 55.8 | 25 | 45.5 |
| Play online games | Never | 5 | 11.9 | 2 | 3.6 |
| | Sometimes | 16 | 38.1 | 37 | 67.3 |
| | Often | 21 | 50 | 16 | 29.1 |
| Search for school-related content (encyclopedias, stories, books…) | Never | 1 | 2.3 | 9 | 16.4 |
| | Sometimes | 30 | 69.8 | 24 | 43.6 |
| | Often | 12 | 27.9 | 22 | 40.0 |
| Makes Youtube videos | Never | 17 | 39.5 | 46 | 83.6 |
| | Sometimes | 23 | 53.5 | 3 | 5.5 |
| | Often | 1 | 2.3 | 6 | 10.9 |

The results in Table 5 show that children often use the internet for various purposes, especially searching for information needed for school, communicating with friends, playing online games and searching for interesting content. The results show that the majority of parents (83.6%) believe that their children never record YouTube videos. Slightly more than half of the participants from the population of teachers (53.5%), are of the opinion that children from their class sometimes record YouTube videos.

The obtained results indicate the diversity of the child's activities on the internet as well as the differences of opinion between parents and teachers in relation to the child's individual activities on the internet.

**Table 6**. Opinions of teachers and parents about the benefits of using the internet for children

| CLAIMS | TEACHERS | | | PARENTS | | | t-test | p |
|---|---|---|---|---|---|---|---|---|
| | N | M | SD | N | M | SD | | |
| The child learns new and useful content on the internet. | 43 | 3.26 | 0.539 | 55 | 3.55 | 0.741 | 2.241 | 0.050 |
| Using the internet, the child acquires digital competences that he will need later | 43 | 3.33 | 0.566 | 55 | 3.73 | 0.804 | 2.886 | 0.007 |
| It is better for children to spend time on the internet than in front of the TV | 43 | 2.56 | 0.881 | 55 | 2.35 | 0.673 | 1.295 | 0.390 |
| By using the internet, children develop faster intellectually | 43 | 2.37 | 1.024 | 55 | 2.67 | 1.072 | 1.409 | 0.317 |
| By using the internet, the child learns to search for information independently | 43 | 3.21 | 0.861 | 55 | 3.60 | 0.955 | 2.120 | 0.067 |
| Children develop their abilities better by playing games on the internet | 43 | 2.12 | 1.051 | 55 | 1.98 | 0.652 | 0.765 | 0.887 |
| The use of the internet contributes to better communication between children | 43 | 1.98 | 0.938 | 55 | 2.24 | 0.769 | 1.471 | 0.282 |
| The internet helps children complete their schoolwork | 42 | 2.76 | 0.958 | 55 | 3.38 | 0.933 | 3.215 | 0.002 |

From the results in Table 6. it can be seen that parents have a more positive opinion about the benefits of using the internet for children than teachers. Using the t-test, a statistically significant difference was found in the opinion of parents and teachers in relation to the statement *The child learns new and useful content on the internet* (t=2.241; p=0.05), in relation to the statement *Using the internet, the child acquires digital competences that he will need later* (t=2.886; p=0.007), and in relation to the claim that the internet helps children to complete school assignments (t=3.215; p=0.002). Comparing all three statements, parents expressed a more positive opinion about the benefits of using the internet for their child. Although there is no statistically significant difference in the opinion of teachers and parents, the results show parents have a more positive opinion in relation to teachers, in relation to the statement *Using the internet, the child learns to search for information independently*.

**Table 7**. The opinion of teachers and parents of school children about the dangers of using the internet for children

| CLAIMS | TEACHERS | | | PARENTS | | | t-test | p |
|---|---|---|---|---|---|---|---|---|
| | N | M | SD | N | M | SD | | |
| Regular use of the internet by a child leads to internet addiction | 43 | 3.88 | 0.793 | 55 | 4.24 | 0.744 | 2.291 | 0.043 |
| Children are exposed to violent and inappropriate content on the internet | 43 | 3.88 | 0.762 | 55 | 4.33 | 0.640 | 3.109 | 0.003 |
| It is better for children to look for explanations of unknown words in books than on the Internet | 43 | 3.42 | 1.006 | 55 | 3.18 | 1.234 | 1.060 | 0.577 |
| Excessive use of the internet can separate children from their parents and friends | 43 | 4.05 | 0.872 | 55 | 3.96 | 1.053 | 0.462 | 0.194 |
| Children play sports less because of the internet | 43 | 3.81 | 0.958 | 55 | 3.51 | 0.940 | 1.551 | 0.241 |
| Instead of playing with their peers. children spend time on the internet | 42 | 3.90 | 0.906 | 55 | 3.69 | 0.998 | 1.088 | 0.552 |
| By using the internet, children are in potential danger from predators | 43 | 3.91 | 0.840 | 55 | 4.09 | 0.800 | 1.074 | 0.564 |
| The internet can have a very negative impact on children's development | 42 | 3.62 | 0.987 | 55 | 3.71 | 0.712 | 0.504 | 0.614 |

The results shown in Table 7. show a statistically significant difference in the opinions of teachers and parents. Compared to teachers, parents expressed greater concern in relation to the statement *Regular use of the internet by a child leads to internet addiction* (t=2.291; p=0.043) and in relation to the statement *Children are exposed to violent and inappropriate content on the internet* t=3.109 p<0,0038. In all other statements, there is no statistically significant difference in the opinion of parents and teachers in relation to the potential dangers that a child may encounter when using the internet.

Leung's and McBride-Chang's[6] research showed that online friendships positively affect the well-being of an individual child and their daily relationships. By participating in games on the internet, following different social groups,

[6] A. M. Leung, C. McBride-Chang, *Game on? Online friendship, cyberbullying, and psychosocial adjustment in Hong Kong Chinese children*, „Journal of Social and Clinical Psychology" 32 (2013) 2, pp. 159–185.

children completely immerse themselves in what they are watching, lose their sense of reality, and perceive participation in online activities as a special reward.[7] Certain studies have revealed that children are generally very little physically active on weekends and holidays, their sleep time and waking time changes, which is a consequence of more time spent in front of the TV screen, computer, and playstation.[8] The authors believe that the mentioned disorders are the result of poorly structured time management, in which parents play an important role. In order not to endanger the health and safety of children, parents should organize activities that will positively affect the health of the child.

According to Duvnjak and Šincek[9], peer violence does not occur only once or twice, but is repeated. There are different forms of traditional peer abuse such as: hitting, mocking, malicious teasing or calling names, but also indirect forms such as: social isolation, avoidance or friendship manipulation. Li's[10] research data shows that the same people are prone to violence on the internet and in the traditional sense (about 30%). The goal of both traditional violence and internet violence is to hurt another person.[11] It should also be noted that violence on the internet differs from classic violence in that the materials with inappropriate content are published and available to everyone, which can ultimately result in negative social and psychological consequences for the child.

Anderson and Bushman[12] indicate a connection between peer and media violence. Children who are exposed to media violence at an earlier school age become verbally and physically aggressive at a later stage. Based on the

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[7] J. Nakamura, M. Csikszentmihalyi, *Flow Theory and Research*, in: C. R. Snyder, S. J. Lopez (eds.), Oxford Handbook of Positive Psychology, Oxford 2009, pp. 195–206.

[8] K. Brazendale, M. W. Beets, R. G. Weaver, R. R. Pate, G. M. Turner-McGievy, A. T. Kaczynski, J. L. Chandler, A. Bohnert, P. T. von Hippel, *Understanding differences between summer vs. school obesogenic behaviors of children: the structured days hypothesis*, „International Journal of Behaviors Nutrition and Physical Activity" 14 (2017), pp. 1–14.

[9] I. Duvnjak, D. Šincek, *Vršnjačko nasilje u digitalnom svijetu*, in: T. Velki., K. Šolić (eds.), *Izazovi digitalnog svijeta,* Osijek 2019, J.J. Strossmayer University in Osijek, pp. 105–121.

[10] Q. Li, *Bullying in the new playground: Research into cyberbullying and cyber victimization,* „Australasian Journal of Educational Technology" 23 (2007) 4, pp. 435–454.

[11] R. M., Kowalski, S. P. Limber, P. W. Agatston, *Cyberbullying: Bullying in the Digital Age*, New Jersey 2008, Blackwell Publishing.

[12] C. A. Anderson, B. J. Bushman, *Effects of violent video games on aggressive behaviour, aggressive cognition, aggressive affect, psyhological arousal and prosocial behaviour: A Meta-Analiytic Review of the Scientific Literature,* „American Psyhological Society" 12 (2001) 5, pp. 353–359.

conducted research, Livazović[13] states that prolonged exposure to violent content can affect a child's behavior.

According to the UNESCO report (2015)[14], the problem of internet safety (delinquency, excessive exposure to the internet, cyber-bullying) is expressed worldwide, with children and young people being recognized as the most at-risk group, since they are not sufficiently aware of the present dangers. Therefore, it is not enough for parents and educational staff to alert children to be careful when using the internet, but it is necessary to teach the child to reduce the risk of using the internet by engaging in responsible and ethical behaviour.[15] According to Borovac[16], a child should learn to understand media literacy in order to be able to think critically about the contents he follows and participates in.

For many years, different theories have described the negative influence of the media on children's behavior: *General Agression Model*[17], *Cognitive Neo-association Theory*[18], *Script Theory*[19], *Symbolic Interaction Theory*[20] and *the Differential Susceptibility to Media Effects Model*[21]. However, the problematization of the threat to the security and privacy of internet users is still in its infancy.

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[13] G. Livazović, *Utjecaj medija na poremećaje u ponašanju adolescenata*, Zagreb 2009, University in Zagreb.

[14] UNESCO, World Trends In Freedom of Expression and Media Development: Special Digital Focus, 2015, http://unesdoc.unesco.org/images/0023/002349/ 234933e.pdf (20.06.2023).

[15] A. Thierer, *Parental Controls and Online Child Protection: A Survey of Tools and Methods,* Washington 2009, D.C.: The Progress & Freedom Foundation.

[16] T. Borovac, *Pregled istraživanja o informacijskoj sigurnosti*, in: T. Velki, K. Šolić (eds.), *Priručnik za informacijsku sigurnost i zaštitu privatnosti*, Osijek 2018, J.J. Strossmayer University in Osijek, pp. 13–34.

[17] C. A. Anderson and B. J. Bushman, *Effects of violent video games on aggressive behaviour, aggressive cognition, aggressive affect, psyhological arousal and prosocial behaviour: A Meta-Analiytic Review of the Scientific Literature*, „American Psyhological Society" 12 (2001) 5, pp. 353–359.

[18] L. Berkowitz, *Aggression: Its causes, consequences, and control*, New York 1993, McGraw-Hill.

[19] L. R. Huesmann, L. D. Eron, *Television and the aggressive child: A cross-national comparison*, New Jersey 1986, Hillsdale, NJ: Lawrence Erlbaum.

[20] R. Catalano, R. Kosterman, J. D. Hawkins, M. Newcomb, R. Abbott, *Modeling the etiology of adolescent substance use: A test of the social development model,* „Journal of Drug Issue" 26 (1996) 2, pp. 429–455.

[21] P. M. Valkenburg, J. Peter, *The differential susceptibility to media effects model*, „Journal of Communication" 63 (2013), pp. 221–243.

Research has shown that poor family relationships, weak peer affiliation and certain personality traits (neuroticism, impulsiveness, excitement seeking, unscrupulousness) can be linked to various risky behaviors of an individual on the internet.[22]

## 5. Conclusion

This research aimed to determine the opinion of teachers and parents about personal forms of internet use and competencies in monitoring and protecting children during their internet use. The research results show that the majority of teachers and parents use the internet and modern digital technology in their daily life and work. A higher percentage of parents than teachers are present on social networks. Teachers are not friends on social networks with children from their class, whereas parents and their children are. These results are expected, when considering the role of parents and the importance of their role as primary educators in the child's life. Furthermore, teachers and parents are aware of the frequency of children's and students' access to the internet.

Since this paper investigates the important topic that is safety of children's internet use, the aim was to determine the opinion of teachers and parents about the advantages and dangers of children's internet use. Research results show that teachers and parents agree that by using the internet children acquire new knowledge and develop digital competencies.

Both parents and teachers believe that the internet helps children to independently search for information and complete their schoolwork. They identify the following dangers: potential screen addiction, violence in games, exposure to inappropriate content, social isolation from the real world, and reduction in physical activity.

Furthermore, both parents and teachers are aware of the need for cooperation, dialogue and mutual support in order to teach the child safe and responsible use of the internet. According to teachers and parents, continuous education of the child, as well as their own, is necessary, so that the child's use of the internet is safe and productive, in accordance with his developmental needs and interests.

[22] T. Velki, I. Letica Borić, *Rizična ponašanja djece i mladih na internetu*, in: T. Velki, K. Šolić (eds.), *Izazovi digitalnog svijeta,* Osijek 2019, J.J. Strossmayer University in Osijek, pp. 61–98.

This study and similar research provide an incentive for the development of educational policies and programs aimed at promoting safe use of the internet in the family and at school, helping the child develop digital literacy and critical thinking in order to understand the potential risks of the virtual world.

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# Exam Cheating Then and Now: A Comparison of Academic Dishonesty in the World's Oldest Testing System and Present-day Academia

## Abstract

In recent years, cheating in exams has been reported to be a serious issue in many countries. Some believe the problem to be more severe, due to the development of modern technologies. But academic dishonesty is not a new phenomenon. This article is going to look into the cheating methods used in the world's first examination system in Imperial China and the means devised to prevent these malpractices. These are compared with examples of exam cheating observed in contemporary societies and the measures that institutions take to safeguard test and certificate validity.

Cheating practices in Imperial exams are described on the basis of the available literature and the preserved artefacts. The state of the problem of cheating by contemporary students has been assembled, based on research articles. Despite all the changes that have occurred in educational systems over the years, cheating methods have not in essence changed significantly.

## Keywords

academic misconduct, academic integrity, cheating in exams, Chinese Imperial examinations

## Introduction

One of the most widely cited definitions of *academic dishonesty* according to Whitley and Keith-Spiegel[1] is that of Pavela[2], who distinguished four types of the phenomenon: cheating, fabrication, plagiarism and facilitating. According to this author, *cheating* is "intentionally using or attempting to use unauthorized materials, information, or study aids in any academic exercise". He defines *facilitating academic dishonesty* as "intentionally or knowingly helping or attempting to help another to commit an act of academic dishonesty".

*Plagiarism*, according to this author, is "deliberate adoption or reproduction of ideas or words or statements of another person as one's own without acknowledgement". And *fabrication* is "intentional and unauthorised falsification or invention of any information or citation in an academic exercise".

Cizek provides an expanded definition of *academic cheating*: "any intentional action or behavior that violates the established rules governing the completion of a test or assignment; cheating gives one student an unfair advantage over other students on a test or an assignment and decreases the accuracy of the intended inferences arising from a student's performance on a test or an assignment."[3] According to this researcher, "a person may not actually take a test himself or herself, but may use another person (called a 'confederate') to take the test in his or her place."[4] Otherwise called *impersonation*, in Pavela's typology, this would be an example of an act of *facilitating academic dishonesty*.

All the above-mentioned types of academic malpractices are omnipresent in the contemporary educational systems. Reports in the popular press[5],

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[1] B. E. Whitley, P. Keith-Spiegel, *Academic dishonesty. An educator's guide*, Mahwah, NJ 2002, Lawrence Erlbaum Associates, pp. 16–17.

[2] G. Pavela, *Judicial review of academic decision-making after Horowitz*, "School Law Journal" 8 (1978) 1, p. 78.

[3] G. J. Cizek, Cheating in academics, in: C. Spielberger (ed.), *Encyclopaedia of Applied Psychology*, San Diego, CA 2004, Academic Press, p. 308.

[4] G. J. Cizek, *An overview of issues concerning cheating on large-scale tests*, in: J. O'Reilly (ed.), *Proceedings of the National Association of Test Directors*, Mesa, AZ 2001, NATD, p. 7.

[5] Cf. R. Adams, *Rising number of pupils caught bringing phones into exams*, in: *The Guardian,* 2019, December 13. *https://www.theguardian.com/education/2019/dec/13/pupils-phones-exams-gcse-a-level-technology-cheat* (12.02.2023) and H. Richardson, *More students found cheating in GCSE and A-Level exams*, in: *BBC News*, 2018, January 5, https://www.bbc.com/news/education-42578874 (12.02.2023).

as well as in scientific research[6], prove that academic dishonesty is a serious problem and that it has increased dramatically in the last decades. Many see the cause of this rise in the development of technology and the possibilities that the Internet offers.[7] Shifting education online in effect of the global Covid-19 pandemic has brought exam cheating to yet another level.[8]

Due to the visible rise in exam cheating in recent years, and the debate that has arisen around the issue, some people tend to think that examination malpractice is a modern phenomenon. But cheating in exams is, in fact, as old

[6] Cf. G. J. Cizek, *An overview of issues concerning cheating on large-scale tests*, in: J. O'Reilly (ed.), *Proceedings of the National Association of Test Directors*, Mesa, AZ 2001, NATD, p. 7; M. Birks, J. Mills, S. Allen, S. Tee, *Managing the mutations: Academic misconduct in Australia, New Zealand and the UK*, "International Journal for Educational Integrity" 16 (2020) 6, (12.02.2023); L. Garavalia, E. Olson, E. Russell, L. Christensen, *How do students cheat?*, in: E. M. Anderman, T. B. Murdock (eds.), *Psychology of academic cheating*, Burlington, MA 2007, Elsevier Academic Press, pp. 33–58; D. L. McCabe, L. K. Treviño, K. D. Butterfield, *Cheating in academic institutions: A decade of research*. "Ethics & Behavior" 11 (2001) (3), pp. 219–232; M. Peters, *Academic integrity: An interview with Tracey Bretag*, "Educational Philosophy and Theory" 51 (2019) 8, pp. 751–756; A. M. Sendur, *(Nie)uczciwość akademicka polskich studentów a poświadczanie kwalifikacji* [Academic (dis)honesty of Polish students and the certification of their competences], in: A. Dąbrowski, R. Kucharczyk, A. Leńko-Szymańska, J. Sujecka-Zając (eds.), *Kompetencje dla XXI wieku: Certyfikacja biegłości językowej* [Competences of the 21st century: Certification of language proficiency], Warszawa 2020, Wydawnictwa Uniwersytetu Warszawskiego, pp. 244–266.

[7] Cf. R. Adams, *Rising number of pupils caught bringing phones into exams*, in: *The Guardian,* 2019, December 13. https://www.theguardian.com/education/2019/dec/13/pupils-phones-exams-gcse-a-level-technology-cheat (12.02.2023); T. Hollman, N. Palmer, D. Chaffin, K. Luthans, *Lying, cheating, & stealing: Strategies for mitigating technology-driven academic dishonesty in collegiate schools of business*, "Mountain Plains Journal of Business and Technology" 22 (2021) 1, pp. 31–50; T. Lancaster, R. Clarke, *Rethinking assessment by examination in the age of contract cheating*, in: *Plagiarism across Europe and beyond 2017—Conference Proceedings*. Brno 2017, pp. 215–228; A. Lathrop, K. E. Foss, *Student cheating and plagiarism in the internet era: A wake-up call*, Englewood 2000, Libraries Unlimited; H. Mellar, R. Peytcheva-Forsyth, S. Kocdar, A. Karadeniz, B. Yovkova, *Addressing cheating in e-assessment using student authentication and authorship checking systems: Teachers' perspectives.* "International Journal of Educational Integrity" 14 (2018) 2, pp. 1–21; D. J. Pell, *That's cheating: The (online) academic cheating 'epidemic' and what we should do about it*, in: J. Baxter, G. Callaghan, J. McAvoy (eds.), *Creativity and critique in online learning* Cham 2018, Palgrave Macmillan, pp. 123–147; Y. Rosmansyah, I. Hendarto, D. Pratama, *Impersonation attack-defense tree*, "International Journal of Emerging Technologies in Learning (iJET)" 15 (2020) 19, pp. 239–246.

[8] Cf. E. Bilen, A. Matros, *Online cheating amid COVID-19,* "Journal of Economic Behavior and Organization", 182 (2020), pp. 196–211; Sendur, A. M., & Kościńska, A. *Kształcenie w sieci—teoria i praktyka. Przewodnik dla nauczycieli języków obcych i nie tylko* [Web-based Education—Theories and Applications. Companion for Language Teachers and Other Educators], Kraków 2021, Oficyna Wydawnicza KAAFM, pp. 149–181.

as any examination system. And the oldest noted examination system was that in Imperial China: "In any history of testing, the Chinese Imperial examinations naturally come first, as this was the first state-wide effort to establish a testing system under centralized control."[9]

In this article we are going to look into the different cheating methods which examinees used in the Chinese Imperial exams and the procedures undertaken to prevent these practices. The account is based on the available literature on the subject and on the existing artefacts. We are also going to compare these malpractices with the ones which contemporary students use to achieve their goals, as well as the preventive measures adopted by educational and certification institutions to safeguard test and certificate validity. Thus, the research methodology that will be used in this article is literature review.

## Cheating in the Chinese Imperial Examination System

The origins of the Imperial examination system—the Kējǔ[10]—can be traced back to the Imperial period of the Han dynasty (201 BCE–8 AD), when they were used to recruit members of the national bureaucracy. But it is during the Sui dynasty (581–617) that it became a fully-fledged examination system. It was extensively developed and expanded over the centuries until 1905, when it was eventually abolished during the final years of the Qing dynasty.

The Imperial examinations can be considered as the first standardised method of recruitment. Their aim was to select the best (at least in theory) candidates for government offices regardless of their social class. The Emperors' intent was

[9] B. Spolsky, *History of language testing*, in: E. Shohamy, I. Or, S. May (eds.), *Language testing and assessment. Encyclopedia of language and education*, New York 2017, Springer International Publishing, p. 376.

[10] Cf. L. Cheng, A. Curtis, *English language assessment and the Chinese learner*, New York/London 2010, Routledge; H. De Weerdt, *Competition over content. Negotiating standards for the civil service examinations in Imperial China (1127–1279)*, Cambridge, MA 2007, Harvard University Asia Center; B. A. Elman, *A cultural history of civil examinations in late Imperial China*. Berkeley 2000, University of California Press; I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press; B. Spolsky, *The state of the art in language assessment: Notes for the third millennium*, "Russian Language Journal", 55 (2005) 180/182, pp. 169–187; B. Spolsky, *History of language testing*, in: E. Shohamy, I. Or, S. May (eds.), *Language testing and assessment. Encyclopedia of language and education*, New York 2017, Springer International Publishing, pp. 375–384.

to recruit civil officials on the basis of merit rather than family or political connections, reducing at the same time the power of aristocracy, and to promote men who were more likely to be loyal to the emperor and not to their family interests. In this way "the Chinese model set the precedent of using tests as a competitive selection device."[11]

The reward was so lucrative and esteemed that hundreds of thousands of candidates[12] took part in the consecutive stages of the examination process over and over again, many well into their advancing years. Some devoted their entire lives to taking the exams. The esteem and the financial benefits that could be earned through obtaining good results in the examinations were of such value that it was worthwhile to take the risks and try to cheat one's way through the examinations.

Miyazaki[13], Elman[14], Cheng and Curtis[15], and Suen and Yu[16] describe a number of noteworthy procedures introduced in the Imperial examinations in order to prevent cheating, whereas Elman[17], Buckley Ebrey[18], and *The Shanghai Imperial Examination System Museum* catalogue[19] present pictures of

[11] B. Spolsky, *The state of the art in language assessment: Notes for the third millennium*, "Russian Language Journal", 55 (2005) 180/182, p. 169.

[12] P. Buckley Ebrey, *The Cambridge illustrated history of China*, Cambridge 1996, Cambridge University Press, p. 147 and H. De Weerdt, *Competition over content. Negotiating standards for the civil service examinations in Imperial China (1127–1279)*, Cambridge, MA 2007, Harvard University Asia Center, pp. 5–6.

[13] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press.

[14] B. A. Elman, *A cultural history of civil examinations in late Imperial China*. Berkeley 2000, University of California Press and B. A. Elman, *Civil examinations and meritocracy in late Imperial China*, Cambridge, MA 2013, Harvard University Press.

[15] L. Cheng, A. Curtis, *English language assessment and the Chinese learner*, New York/London 2010, Routledge.

[16] H. K. Suen, L. Yu, *Chronic consequences of high-stakes testing? Lessons from the Chinese civil service exam*, "Comparative Education Review" 50 (2006) 1, pp. 46–65.

[17] B. A. Elman, *A cultural history of civil examinations in late Imperial China*. Berkeley 2000, University of California Press and B. A. Elman, *Civil examinations and meritocracy in late Imperial China*, Cambridge, MA 2013, Harvard University Press.

[18] P. Buckley Ebrey, *The Cambridge illustrated history of China*, Cambridge 1996, Cambridge University Press, p. 147 and H. De Weerdt, *Competition over content. Negotiating standards for the civil service examinations in Imperial China (1127–1279)*, Cambridge, MA 2007, Harvard University Asia Center.

[19] *Shanghai Imperial examination system museum catalogue*, *The*., n.d.

historical exhibits, period pieces and reproductions portraying the reality of the system.

The Imperial system had probably one of the most elaborate security measures. The exams were strictly supervised to ensure transparency and to deter cheating. They were conducted under special, very stern conditions, at every level. In each provincial capital, there was a permanent examination compound. To make sure that no unauthorised person entered the hall and to prevent any communication with the outside world during the exams, there was only one entrance, which was used by the staff and the candidates alike. The site was isolated from the outside world by a great wall. There was a number of tall watchtowers on the site, from which the candidates were observed, as well as the main guard tower overlooking the whole compound. Inside, the compound was subdivided like a honeycomb. It contained an aggregation of thousands of single doorless rooms, or cells: each large enough to hold just one man. The cells were equipped with three long boards—one served as a desk, one as a seat and another one functioned as a shelf. Candidates taking provincial examinations spent three days and two nights in succession inside the cubicle.

There were some very strict rules and detailed specifications concerning clothing and personal items that could be brought into the compound. On entry, the candidates were searched twice—at the first and the second gate—to make sure they had no books, notes or money with which they could bribe a clerk. And it was not just the students who were searched. Minor administrative officials were also frisked upon entry to the compound. According to Miyazaki[20], the soldiers went as far as to cut open dumplings that the students brought with them, in order to examine their fillings. If something suspicious was found, the inspecting soldier received an award and the wrongdoer was punished. If any irregularity were to be discovered at the second gate, not only would the student be punished, but so would the first inspector.

Prior to the exam, test booklets were checked to make sure they were blank and that no cheat sheets had been smuggled in. According to Miyazaki, a candidate was allowed to leave his seat only once during the exam, to drink tea or go to the toilet. The students were not allowed to talk, to change seats or even to hum, even though it would have been quite natural when they were preparing rhymes for poems. Dropping a paper aroused suspicion, which could lead to the

[20] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, p. 44.

student having a special seal stamped onto his sheet. This could consequently affect the judge's impression and lead to the student's failure. The time allotted for the particular tasks was very restricted. Candidates' work on the tasks was monitored by marking their progress on the papers at a given time. If many candidates wrote almost identical answers, all were failed. After marking was completed, the candidate's papers from the earlier district and prefectural examinations were used to verify his identity by comparing the calligraphy.

In order for all the students to be treated equally and to prevent any possibility of the graders (judges) showing partiality towards certain candidates, severe restrictions connected with marking the papers were introduced. First of all, anonymity was ensured by having the examination papers coded. The candidate's name was removed from the answer sheet and only the seat number was used to identify him and his answer. Secondly, the place in which each examiner would serve was not decided until the last moment. The examiners were completely shut off in their quarters and could not leave the area until the last paper had been marked. But probably the most characteristic procedure that the Imperial examinations are famous for is the use of different colour ink and the copying of the students' papers before they were judged. The candidates were supposed to write their papers in black ink and no other colour was permitted. The black versions were then copied by clerks on separate sheets of paper, this time using vermilion ink. Next, both copies were passed on to the proofreaders, who made their corrections in yellow. Both, the copyists and the proofreaders, took full responsibility for their work by noting their names on the papers; any wrongdoing on the side of this staff was penalised. The vermilion copies were then judged by the examiners and marked, using blue ink.

If any signs of cheating were discovered, both the student and the staff member were punished. Heavy penalties were imposed on the cheating candidate or his accomplice if they were caught: from being caned or placed in stocks for a month, through public disgrace, a permanent stain on the professional record, to being barred from future examinations. If an examiner was found to have taken a bribe or shown favouritism, he could lose his office and might even be banished. There was also a registered case of death sentences being carried out on the chief examiner and some other highest-ranking officials who were accused of malfeasance.[21]

[21] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, pp. 61–62.

Despite the fact that so much effort was made to prevent both the students and the examination staff from cheating, it is known that substitutes frequently sat the exams in place of the candidates, and the judges could not discover this deception from the papers alone.[22] According to Chen, as many as 30–40% of prefectural examinees during the late Qing dynasty were illegally hired substitutes.[23] In spite of the search procedures on entry to the compound, it was not rare for a candidate to slip something past the eyes of the inspectors. Miyazaki claims that "during their worst times […] enough books were brought in to stock a bookstore."[24] There is also proof available that candidates sneaked in cheat sheets on fans, items of clothing or written on their skin, hidden inside pockets, hats, the soles of their shoes, the linings of clothes, in the handles of pens, the bases of ink slabs and in lunch boxes. Notes on undergarments were sometimes written with invisible ink made from herbs, which became visible when rubbed with dirt.[25]

Publishers, who realised that many of the examination questions were repeated or just slightly modified in subsequent sessions, compiled and printed collections of examination answers for the candidates to memorise, or to use as cheat sheets. They did this in spite of the fact that official decrees outlawed such procedures.[26] These practices resemble what we would now call essay or paper mills.

Bribery of officials and compound workers was also a common activity. They might have been bribed to place cheat sheets in the exam booths before the exam started, to switch identification numbers of candidates with those obtaining high

[22] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, p. 21.

[23] As cited in H. K. Suen, L. Yu, *Chronic consequences of high-stakes testing? Lessons from the Chinese civil service exam*, "Comparative Education Review" 50 (2006) 1, pp. 46–65.

[24] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, p. 44.

[25] M. Moore, *Ancient Chinese 'cheat sheets' discovered*, in: *The Telegraph*, 2009, July 15, https://www.telegraph.co.uk/news/worldnews/asia/china/5834418/Ancient-Chinese-cheat-sheets-discovered.htm (12.02.2023) and H. K. Suen, L. Yu, *Chronic consequences of high-stakes testing? Lessons from the Chinese civil service exam*, "Comparative Education Review" 50 (2006) 1, p. 57.

[26] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, p. 17.

scores, or to give high scores to essays that had some secret signs in them, like a certain character appearing at a pre-arranged space and line.[27]

Despite the elaborate security measures to ensure transparency of the exams, including strict supervision, stern examination conditions, tough marking rules and severe punishments, cheating in the Imperial examination system flourished. The methods used by the test-takers do not seem very different from the ones used by students today. They involved impersonation, collusion, copying from notes smuggled into the examination hall on all kinds of materials, and bribery. The reward was so profitable that the benefits outweighed the potential risks.

## A Comparison of Academic Cheating by the Contemporary Students and that in Imperial China

As has been demonstrated above, academic malpractice is not a new invention. It has existed from the moment the first high-stakes examinations were introduced many centuries ago. It is still present today and seems to be on the rise. But how much does the phenomenon itself and the activities connected with it in the modern world differ from those in the world's oldest testing system?

The existence of exam malpractice forces certification institutions into adopting tough security measures, meant to prevent exam cheating and to safeguard the validity of the results.[28] It is no longer a guard observing the test takers from a watchtower, but a human invigilator or a remote invigilation system that is meant to deter candidates from attempting any kind of academic fraud, or to observe any violation of rules. Specifications concerning personal items that can be brought into the examination room are laid down to prevent candidates from bringing in illicit materials, just like in the Chinese exams. Examination facilities have to meet special conditions. Candidates should be seated far apart so as to minimise distractions and to prevent prohibited collaboration. In some

[27] I. Miyazaki, *China's examination hell. The civil service examinations of Imperial China*, New Haven/London 1981, Yale University Press, p. 62.

[28] Cf. Y. Rosmansyah, I. Hendarto, D. Pratama, *Impersonation attack-defense tree*, "International Journal of Emerging Technologies in Learning (iJET)" 15 (2020) 19, pp. 239–246; Cambridge Assessment International Education, *Cambridge Handbook 2021. Regulations and guidance for administering Cambridge exams*, Cambridge 2020, UCLES, pp. 105–108; https://www.ets.org/toefl/score-users/about/security (12.02.2023); https://www.occupationalenglishtest.org/test-regulations/ (12.02.2023).

venues, special partitions are available for the testing stations, which, in essence, resemble the exam cubicles from the Imperial exams. In high-stakes exams, rules and regulations state the sanctions applied against candidates or staff engaging in malpractice. They are not as extreme as the ones which culprits faced in Imperial China, but depending upon the stakes, they may be rather severe. Depending upon the certification institution and the jurisdiction of the country where the fraud has occurred, the examinee involved in malpractice may be banned from taking the test in future, be liable to legal action or may be reported to regulatory authorities. Coding papers in order to ensure students' anonymity, which has its beginnings in the Imperial exams, is now a regular procedure. Marking exam papers in high-stakes exams is also often conducted under strict restrictions.

The Covid-19 pandemic has brought about changes in education and in assessment. New cheating methods connected with e-learning and other kinds of online education have been in place for some time now[29], but the fast-paced transition from classroom teaching and assessment to distance education and online testing has made the problem more salient. Consequentially, new remote invigilation systems, which had already been in use prior to the pandemic, were further developed and introduced to the market on a much larger scale.[30]

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[29] Cf. M. Dadashzadeh, *The online examination dilemma: To proctor or not to proctor?*, "Journal of Instructional Pedagogies" 25 (2020), pp. 1–11; J. Davis, *Interview with a cyber-student: A look behind online cheating*, "Online Journal of Distance Learning Administration", 19 (2016) 3, https://www.learntechlib.org/p/193191/ (12.02.2023); L. P. Hollis, *Ghost-students and the new wave of online cheating for community college students*, "New Directions for Community Colleges" 183 (2018), pp. 25–34; T. Lancaster, R. Clarke, *Rethinking assessment by examination in the age of contract cheating*, in: *Plagiarism across Europe and beyond 2017—Conference Proceedings*. Brno 2017, pp. 215–228; H. Mellar, R. Peytcheva-Forsyth, S. Kocdar, A. Karadeniz, B. Yovkova, *Addressing cheating in e-assessment using student authentication and authorship checking systems: Teachers' perspectives.* "International Journal of Educational Integrity" 14 (2018) 2, pp. 1–21.

[30] Cf. O. Akaaboune, L. H. Blix, L. G. Carrington, C. D. Henderson, *Accountability in distance learning: The effect of remote proctoring on performance in online accounting courses*, "Journal of Emerging Technologies in Accounting" 19 (2022) 1, pp. 121–131; R. Bawarith, A. Basuhail, A. Fattouh, A. S. Gamalel-Din, *E-exam cheating detection system*, "International Journal of Advanced Computer Science and Applications" 8 (2017) 4, http://dx.doi.org/10.14569/IJACSA.2017.080425 (12.02.2023); M. Dadashzadeh, *The online examination dilemma: To proctor or not to proctor?*, "Journal of Instructional Pedagogies" 25 (2020), pp. 1–11; M. J. Hussein, J. Yusuf, A. S. Deb, L. Fong, S. Naidu, *An evaluation of online proctoring tools*, "Open Praxis" 12 (2020) 4, pp. 509–525; J. E. Purpura, M. Davoodifard, E. Voss, *Conversion to remote proctoring of the Community English Language Program online placement exam at Teachers College, Columbia University*, "Language Assessment Quarterly" 18 (2021) 1, pp. 42–50.

However, despite all of the measures taken, academic cheating seems to be ubiquitous. Traditional techniques that existed in the 1300-year history of the Chinese Imperial examinations are still in use: cheat notes and other illicit materials and equipment are smuggled into the examination rooms. Students bring in notes on pieces of paper, on school supplies like rulers or Tippex, and on one's body.[31] Electronic devices and the Internet are becoming the new cheat sheets.[32] Students smuggle in notes on their mobile phones, use the devices to check information on the Internet, take photographs of examination papers and send them to another person, with the aim of seeking help during an exam or saving them for future use, they also communicate with an accomplice outside of the exam room. Essay mills sell commissioned pieces of writing, and essay banks offer pre-written essays that students can purchase.[33] Facilitating academic dishonesty by hiring impersonators to sit the test, or even sit a whole

[31] Cf. E. Denisova-Schmidt, Y. Prytula, N. R. Rumyantseva, *Beg, borrow, or steal: Determinants of student academic misconduct in Ukrainian higher education*, "Policy Reviews in Higher Education" 3 (2019) 1, pp. 4–27; S. Fontaine, E. Frenette, M. H. Hébert, *Exam cheating among Quebec's preservice teachers: The influencing factors*, "International Journal of Educational Integrity" 16 (2020) 14, https://doi.org/10.1007/s40979-020-00062-6; L. Garavalia, E. Olson, E. Russell, L. Christensen, *How do students cheat?*, in: E. M. Anderman, T. B. Murdock (eds.), *Psychology of academic cheating*, Burlington, MA 2007, Elsevier Academic Press, pp. 33–58; M. Sendur, *(Nie)uczciwość akademicka polskich studentów a poświadczanie kwalifikacji* [Academic (dis)honesty of Polish students and the certification of their competences], in: A. Dąbrowski, R. Kucharczyk, A. Leńko-Szymańska, J. Sujecka-Zając (eds.), *Kompetencje dla XXI wieku: Certyfikacja biegłości językowej* [Competences of the 21st century: Certification of language proficiency], Warszawa 2020, Wydawnictwa Uniwersytetu Warszawskiego, pp. 244–266.

[32] Cf. S. Fontaine, E. Frenette, M. H. Hébert, *Exam cheating among Quebec's preservice teachers: The influencing factors*, "International Journal of Educational Integrity" 16 (2020) 14, https://doi.org/10.1007/s40979-020-00062-6; L. Garavalia, E. Olson, E. Russell, L. Christensen, *How do students cheat?* in: E. M. Anderman, T. B. Murdock (eds.), *Psychology of academic cheating*, Burlington, MA 2007, Elsevier Academic Press, pp. 33–58; T. Lancaster, R. Clarke, *Rethinking assessment by examination in the age of contract cheating*, in: *Plagiarism across Europe and beyond 2017—Conference Proceedings*, Brno 2017, pp. 215–228; A. Lathrop, K. E. Foss, *Student cheating and plagiarism in the internet era: A wake-up call*, Englewood 2000, Libraries Unlimited; H. Mellar, R. Peytcheva-Forsyth, S. Kocdar, A. Karadeniz, B. Yovkova, *Addressing cheating in e-assessment using student authentication and authorship checking systems: Teachers' perspectives*, "International Journal of Educational Integrity" 14 (2018) 2, pp. 1–21.

[33] Cf. C. Crook, E. Nixon, *How Internet essay mill websites portray the student experience of higher education*, "The Internet and Higher Education" 48 (2021), pp. 1–9 and D. J. Pell, *That's cheating: The (online) academic cheating 'epidemic' and what we should do about it*, in: J. Baxter, G. Callaghan, J. McAvoy (eds.), *Creativity and critique in online learning*, Cham 2018, Palgrave Macmillan, pp. 123–147.

course for another student, is also present in contemporary education.[34] Different kinds of collusion and corruption, similar to those described in the literature on the Imperial examinations, are still not uncommon today.[35] Shon[36] and Davis, Drinan, and Gallant[37] describe in greater detail, the numerous ways in which contemporary students cheat in exams and classroom tests, at different levels of education.

Times have changed, but practices among students and exam candidates do not differ to a great extent. Examination forms and procedures are continuously being transformed; new cheating methods are born or old ones are modified. Academic misconduct has been with us for hundreds of years and does not seem to be heading for extinction.

## Discussion

Cheating in exams is not a new phenomenon. It has existed from the moment the first examinations in which the test-taker had something to win or lose began. In the Chinese Imperial examinations, the candidate's future and the wellbeing of the whole family depended upon the results. In the modern culture, exams and other kinds of certification also play a crucial role. Thousands of candidates take exams in order to move through to the successive levels of education, or to

[34] Cf. J. Davis, *Interview with a cyber-student: A look behind online cheating*, "Online Journal of Distance Learning Administration" 19 (2016) 3, https://www.learntechlib.org/p/193191/ (12.02.2023); L. P. Hollis, *Ghost-students and the new wave of online cheating for community college students*, "New Directions for Community Colleges" 183 (2018), pp. 25–34; Y. Rosmansyah, I. Hendarto, D. Pratama, *Impersonation attack-defense tree*, "International Journal of Emerging Technologies in Learning (iJET)" 15 (2020) 19, pp. 239–246.

[35] Cf. G. J. Cizek, *An overview of issues concerning cheating on large-scale tests*, in: J. O'Reilly (ed.), *Proceedings of the National Association of Test Directors*, Mesa, AZ 2001, NATD, pp. 1–30; E. Denisova-Schmidt, *Corruption in higher education: Global challenges and responses*, 2020, Brill; E. Denisova-Schmidt, Y. Prytula, N. R. Rumyantseva, *Beg, borrow, or steal: Determinants of student academic misconduct in Ukrainian higher education*, "Policy Reviews in Higher Education" 3 (2019) 1, pp. 4–27.

[36] P. C. H. Shon, *How college students cheat on in-class examinations: Creativity, strain, and techniques of innovation*, "Plagiary: Cross-Disciplinary Studies in Plagiarism, Fabrication, and Falsification" 1 (2006), pp. 130–148.

[37] S. F. Davis, P. F. Drinan, T. B. Gallant, *Cheating in school: What we know and what we can do*, Chichester 2009, Wiley-Blackwell, pp. 89–100.

receive an attestation of their knowledge, skills, competencies or expertise. Certificates open doors to better jobs or higher positions.

A wide range of similarities can be found between the systems. Starting from the examination venues, the rules and regulations concerning the test-takers and the examination staff, the sanctions imposed upon those who breached the rules, the ways of safeguarding the integrity of the exams by the use of a variety of invigilation methods, to the choice of cheating methods and techniques. The differences are mainly connected with the social, cultural and technological developments that have occurred over the hundreds of years in question. They relate mainly to the severity of the consequences imposed upon the wrongdoer, the forms in which exam invigilation is conducted, and the materials used in the particular cheating techniques.

Research studies have revealed multiple reasons for cheating in exams. Candidates point to the low usability of the tested material, to the fact that the material is too difficult and requires too much effort to learn, to heavy workload and insufficient study time.[38] But the primary motive is the desire to achieve a better grade. This was true in the Imperial examinations and it still is today. As Drake noted over 80 years ago, when he set out to find the answer to the question why students cheat: "it is evident that cheating grows out of the competitive system under which college credits are awarded."[39] Therefore the higher the stakes, the more there is to gain by illicit behaviours.

To many, cheating in tests and exams may seem a victimless crime that does not call for serious research. Others may think that trying to combat this state of affairs is doomed to failure, for it is inextricably bound with any examination system. So why is examination malpractice really a problem?

Obviously, it is morally and ethically wrong, and just because of this reason, it should be combatted. But primarily, there is the very significant issue of validity. The concept of validity refers to the accuracy of the interpretations about examinees, based upon their test scores. It is "the degree to which scores on an appropriately administered instrument support inferences about variation in the

[38] A. M. Sendur, *(Nie)uczciwość akademicka polskich studentów a poświadczanie kwalifikacji* [Academic (dis)honesty of Polish students and the certification of their competences], in: A. Dąbrowski, R. Kucharczyk, A. Leńko-Szymańska, J. Sujecka-Zając (eds.), *Kompetencje dla XXI wieku: Certyfikacja biegłości językowej* [Competences of the 21st century: Certification of language proficiency], Warszawa 2020, Wydawnictwa Uniwersytetu Warszawskiego, p. 254.

[39] C. A. Drake, *Why Students Cheat*, "The Journal of Higher Education" 12 (1941) 8, p. 420.

characteristic that the instrument was developed to measure."[40] Considering that the main purpose of a graded test is to determine what students have learnt after instruction, cheating interferes with an evaluator's ability to make such judgments.[41] Therefore, the effects of exam cheating are inaccurate and unreliable inferences about the test-takers' knowledge, skill or ability.

## Conclusions

In order to minimise the scope of exam cheating and its consequences, teachers and administrators should be aware of the prevalence of the dishonest behaviours. They should be familiar with the ways in which students cheat. But this knowledge alone is not enough. Greater consistency in policies and procedures is essential.[42] Teachers and institutions should create clear and straightforward rules of conduct concerning academic integrity, and make sure to consistently enforce them at every stage of education. And most importantly, they should convey the message about the importance of academic honesty and the consequences of dishonest behaviour to students from the earliest stages of education. Looking back in time, it would be unwise to believe that these measures will eradicate academic cheating completely, however, it seems to be the only way to at least deplete the unwelcome practices. Differences concerning attitudes towards cheating between nationalities have been observed in research studies[43], which allows us to believe that enforcing appropriate policies concerning academic integrity proves effectual in lowering the rate of dishonest behaviours in academia.

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[40] G. J. Cizek, *Defining and distinguishing validity: Interpretations of score meaning and justifications of test use*, "Psychological Methods" 17(1) (2012), p. 35.

[41] L. Garavalia, E. Olson, E. Russell, L. Christensen, *How do students cheat?*, in: E. M. Anderman, T. B. Murdock (eds.), *Psychology of academic cheating*, Burlington, MA 2007, Elsevier Academic Press, p. 35.

[42] Cf. M. Birks, J. Mills, S. Allen, S. Tee, *Managing the mutations: Academic misconduct in Australia, New Zealand and the UK*, "International Journal for Educational Integrity" 16 (2020) 6 and T. Hollman, N. Palmer, D. Chaffin, K. Luthans, *Lying, cheating, & stealing: Strategies for mitigating technology-driven academic dishonesty in collegiate schools of business*, "Mountain Plains Journal of Business and Technology" 22 (2021) 1, pp. 31–50.

[43] A. M. Sendur, Academic malpractice in tests and exams from an international perspective, "Przegląd Badań Edukacyjnych" ("Educational Studies Review"), 36 (2022) 1, pp. 153–175.

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# Chess as a pedagogical tool

## Abstract

The present article discusses an original way of learning chess in the school context. This proposition concerns the first year of learning chess by the seven-year-old pupils. The organizational principles are described, resulting in the children's age, psychological disposition and didactic implications. Four school subjects are linked with chess instructions. Firstly, chess is presented as a physical education, which is not common. Subsequently, Polish, mathematics and arts activities are suggested. The whole project is dedicated to promoting chess learning in a friendly context, even for children who will not choose to become chess players.

## Keywords

chess, primary education, integrated skills

## 1. Introduction

The aim of this article is to provide a solution to the problem of teaching chess in large groups which are not chess-oriented. The proposition concerns seven-year-olds because at this level of teaching, the problem seems most serious. The first aspect to discuss has to be the motor phase of child development. The second one will be the integrated character of teaching at this school level. It will be proved that learning chess through movement can resolve both problems.

Two different and common methods of teaching chess are: firstly, at home and secondly, in a club. A new way—at school, for the whole group just has come to the fore. A pedagogical approach in this case, emanating from the first two methods of teaching, is inappropriate.

The first situation takes a truly pupil-oriented approach, including: personalized explanation, modification of the game to meet individual needs of the player, to reduce the differences between the players' level (for example: the person who teaches plays without the Queen or without pawns, etc.), a time-slot is chosen in an appropriate way when the „teacher" and the „pupil" are in a good mood, are not bound by time limits, and are at leisure.

The second situation is characterized by the pupils' attitude: they are ready to study chess—by their willingness to study, and by level of intellectual development. Usually, the groups of pupils are small, for example 10–12 persons. In addition, they can be of different levels, so that the teacher can explain advanced rules to some pupils and the beginners can observe them at the same time.

In the case of popularizing chess classes at school, the situation is completely different. Usually, in the field of public education, groups are large—over 20 persons. The seven-year-olds are at very different stages of physical and intellectual development. Therefore, they differ in the way in which they deal with different kinds of activities, for example, some of them can run very fast, others are able to focus on one topic for longer. The risk arises in a situation when, encouraged by the advantages of learning chess, the teacher (or school authorities, or the government) impose chess learning on everybody in a tournament-like approach to teaching. For pupils who do not have appropriate skills for learning chess (and these are over-represented in an ordinary group), this forceful approach can lead to low self-esteem. Indeed, the teacher has to offer a wide range of activities to suit particular skills. The target is to identify the topmost types of skills represented by individual children, and identity those who potentially qualify for playing chess.

## 2. Didactic unit composition

The lesson comprises a single meeting which has its own aims and schedule. The didactic unit is the sequence of a few lessons with a common topic. At integrated teaching level, it is customary to propose to pupils didactic units rather than single lessons. The purpose of the methodology is repetition of contents in various contexts, which stimulates pupils to memorize it and understand the leading point of a particular unit.

You will find below a framework of a didactic unit, which can be helpful in planning your own units.

At the beginning, as a warm-up exercise, it is useful to recall some content from previous classes or introduce a new item through writing or drawing activities. It helps to calm down pupils and enables them to focus on chess.

The second phase of a didactic unit is to offer them some vocabulary and explanation of the topic, which can also be written.

At this stage of learning pupils need some physical activity, so these needs can be realized by learning through movement on/with big garden chessboard or chess Klanza sheet.[1] Later on, pupils can shift chess pieces or pretend to be one.[2]

[1] The usual Klanza sheet is a round, colorful piece of cloth, with handles all around. It is used to make integration games, e.g. changing places for people holding the same color or named colors, going under the cloth if they fulfill certain characteristics, etc. The same way of playing can be proposed for the colors white and black, letters and figures used on the Klanza sheet imitating a chessboard.

[2] Image provided by Author.

After the stage of *learning chess through movement*, the teacher asks the pupils to perform activities involving the fresh knowledge, using small chessboards or their flat paper representations. This is also an appropriate time for making pupils play a kind of a duel game, with rules they already know. Pupils are usually very pleased to play a game, so even a simple round with pawns will be considered by them as a real challenge.

Finally, the teacher has to obtain some feedback from his students by asking them questions or listening to some comments they want to express spontaneously. The chess class can finish with a cheer, for example "We are one Family", which is a FIDE (International Federation of Chess) slogan.

## 3. Learning chess through movement

### 3.1. Games with the chess Klanza sheet

In order to accustom children to the chessboard, it is possible to make them have fun with Klanza sheet type activities. For example, they can hold the four edges of a chess sheet cloth and walk around in a circle singing a counting-out rhyme referring to chess.

The pupils can also hand the chess sheet cloth to one another, until they arrive at the same letter/ or number on the opposite side of the chessboard.

Other activities can involve colors of the chessboard. Not only white and black, but also all types of opposite colors: light vs dark, for example, creamy vs brown or green or blue, yellow vs red, transparent vs smoked, silver vs gold, ivory vs onyx, etc. The teacher asks the pupils who are holding a black field letter to exchange places by running under the chess Klanza sheet. The black field letter means a letter which is next to the black field: a, c, e, g of the first line side and b, d, f, h from the eight-line side. We can follow the same pattern with numbers and opposite colors.

Some pupils can go under the chess Klanza sheet and stay under cover for three seconds. The instructions of the teacher can be as follows: Queen/'c' column, pawn/ figure line, odd/even line, etc. goes under the sheet. If children who are not in the set go under the Klanza chess sheet, they pay a forfeit. In order to recover the forfeit, they have to answer questions, e.g. What color is c3 field?, Which column/ half of chessboard is the Queen's/King's one? How many moves does the pawn have to make in order to reach the last rank and be promoted ("queening the pawn").

### 3.2. Big garden chess mat

The second support, very useful for teaching chess by movement, is a big garden chess mat. It helps develop space orientation in children. The first type of activity consists in moving along lines or diagonals. This kind of practice can be organized in many various ways, for example: pupils can run, jump or walk on the balance beam (e.g. inverted benches). It can be done with some rhythm (e.g. counting fields on which they jump) or as a speed activity done by teams. The chess aim of these exercises is to learn to notice on the chessboard, not only lines referenced by letters or numbers, but also diagonals—black and especially white ones.

After this preparatory work, it is possible to introduce learning the way in which the chess pieces go. The order of introduction varies from one method to another, but, essentially, it is common to introduce pawn moves at first. The reason is that the pawn army can start fighting and this first simplified game is expected by pupils. Another reason is that, after having introduced the King moves, it is possible to practice "pawn endings", which is a crucial ending at the final stage of the game.

Introducing the King allows one to explain the aim of the game and the inestimable value of the precious figure. In addition, one can show the force of the King at the end of game, due to the property of keeping a single field distance between two Kings. For children one field movement in any direction, at the beginning of the game when all figures are there, shows the weakness of the King. In the middle of the game, heavy figures are so impressive that kids can imagine that the King is unimportant. This is a wrong way of thinking because the whole strategy and tactics are King-oriented. The following exercises to demonstrate how the potential of the King can be proposed:

- moves by pairs of Kings—groups of four children play at a big garden chessboard. Two of them have the attributes of Kings and are supposed to make ten correct King's moves, following the King of the opposite color. The other two oversee the moves of the Kings. If a player transgresses the rule of one square distance, they change roles with the observing child.
- playing "King square"—in order to control the pawn, at the final stage of the game, the King has to prevent the pawn from moving to the last line. This is done by keeping the pawn inside of the "King square". At first, following the square rule, the children wonder if the King beats the pawn before the last line or not. Then, they test their hypothesis

by moving pieces/ themselves as chess pieces. The pupils play both the King and the pawn role in various starting positions.

- playing the final positions involving at first the Rook or the Queen and later pairs of Bishops.
- Another step of learning chess is showing the principles of moving the Rook and the Bishop. The move of the Queen will be a fusion of the two. The lines of moving the Rook are simpler than the Bishop's. They have their simple labels—letters or numbers. The diagonals, which are Bishop's moves, could be referred to as number and letter combinations. It is more complicated, because it is necessary to name the beginning and the ending squares of the chosen diagonal. In order to manage the level of difficulty, more exercises should be proposed for the Bishop's moves than for the Rook's ones, for example:
- the Rook power exercise—one or two children have to do the Rook's moves on the big garden chessboard. The remaining part of the group runs on the chessboard during a short song or a counting-out rhyme. When the song stops, they have to stay put on a chosen square paying attention to keep off the Rook's line of attack. The person who is closest to the Rook without the danger of being beaten takes the Rook to imitate its moves during the next turn.
- recognizing the diagonals—pupils put a colorful string on the big garden chessboard following the teacher's indications, such as putting the string along the longest black diagonal, the shortest white, d1-h5 diagonal, etc. This exercise can be followed by a physical one.
- following the diagonals—pupils follow the diagonals in different ways: walking on tiptoes, jumping on one leg, running, leaping like frogs or walking on the string trying to keep balance.
- Bishops' races—one group of children is the white-field Bishop team, the other is the black-field Bishop's. The aim of the race is to run across all the diagonals of the appropriate color on the chessboard. Each child runs along one diagonal and returns along another one, then the next member of the team follows suit. The race begins with the diagonal b1-a2 for the Whites and a7-b8 for the Blacks. The first player of the Whites runs along b1-a2 diagonal and returns along a4-d1 one, then the second player of the Whites continues by running along f1-a6 diagonal and returns along a8-h1 one. The next player follows h3-c8 diagonal returning along e8-h5 one. In the middle of the race the fourth

child has to change direction: s/he starts with h7-g8 diagonal and continues along c8-a6 one. Then the players carry on racing in the opposite direction until they reach the field h1.

In case an activity is quite difficult, so it would be advisable for the teacher to pursue the whole way together with the children in the Indian file. First for the Whites, after for the Blacks. The race of two colors at the same time could be difficult for the children and for the teacher to observe, so it is possible to measure the time of the race, separately for the Whites and for the Blacks, and indicate the winner team on the basis of the time results.

If an exercise cannot be completed simultaneously by different pairs of pupils, it can be done by a relay method. After completing one part of the task, one pupil gives a relay to another one queuing in a line, as it happens during sportive competitions in class.

The most complex chess piece, and most powerful in its moving possibilities, is the Queen. In order to visualize the Queen's offensive force, one child can disguise him/herself as the piece by putting a crown on his/her head. The child chooses one field on the big chessboard and the remaining kids have to place themselves on the fields which are not under attack. If somebody does not do this, the kid is "beaten". The beaten "piece" helps the Queen to grab other pieces by checking the lines and the diagonals she controls. The last pupil who remains on the chessboard (it could be two or three in order to make the play more difficult) becomes the Queen in the next edition of the game.

Other activities on the big chessboard have the function of visualization. If the teacher has to explain and help memorize some repetitive tactical movements, they can be performed by children on the big chessboard. For example, in the *one pawn endgame* (the last part in a chess game, when one color has one pawn and the King, and the opposite color owns only the King), the role of Kings and the pawn can be given to a different child. In this way, the players can have fun repeating the same procedure a number of times. This technique can be used for other chess problems, for example, the pinned piece, the double attack, the *tower bridge*, the triangulation, etc.[3].

As it was proved above, chess can be learned in an active physical way. Learning to play can also involve other integrated school subjects like Polish, art

[3] Panopticum/Szachy by Jan Nowakowski is a complete web site providing detailed information about openings and short games. https://panopticum.opx.pl/info/info.html.

activities and, especially, mathematics. Such possibilities will be discussed in the next section.

## 4. Integrated skills through learning chess

### 4.1. Learning language & culture through chess

Chess has a big potential to instruct with respect to cultures and stories including universal motifs. Owing to over two thousand years of history and contact with multiple cultures, the cultural context, the record of precedencies or the languages linked with chess itself may serve as a rich source of legends, stories, poems and anecdotes.

There is, for example, a very popular legend about a king who would not learn to play chess. Instead, he liked to wage war. A wise man recommended that he would rather wage bloodless wars at the chessboard. In this example, chess has the role of saving the training of life, harmless for others. Another moral of this story is that if we are not prepared for real life, we can be ridiculed. A story like this can be used as a comprehension text and as a starting point of a discussion.

There is also a legend, which combines features of chess with mathematical characteristics. It is a legend about a wise man who taught chess to a sultan. The latter was amazed by the game and promised the wise man everything he wanted as a prize. The wish was apparently modest—he asked for the amount of rice/wheat/corn (it depends upon the region the legend as told) seeds that result from a calculation: adding up the successive results of number 2 (two seeds) raised to the power from 0 to 64 — because there are 64 cases of the chessboard. It appeared that it would be just one corn seed on the first chess square, two seeds on the second one, four, eight, 16… it did not appear to be such a large number, so the sultan agreed. How great was his surprise, when the wise man made him realize that he was not able to fulfill his promise. In fact, the complete number of seeds, even nowadays, surpasses thousands of times the annual crops of the whole earth.

This story shows that mathematics has the power to raise our thinking to unimaginable levels. In this way, the teacher can show to pupils that mathematics goes beyond their imagination and can help the think in chess.

Another way of using chess in language teaching is showing various terminology referring to chess in different countries. For example, if the teacher chooses

five countries like Poland, France, England, India and Russia; the names of the chess pieces change. The different names of pieces are connected with social and historical reality. This can be a pretext for the introduction of cultural differences to pupils. The differences of social organization, and especially the art of war, are shown by the names of King/ Shah, Queen/ Dame/ Vizier/ Hetman[4], Rook/ Tower/ Chariot/ Boat, Bishop/ Jester/ Runner/ Elephant, Knight/ Cavalier/ Jumper/ Horse and finally pawn/foot soldier.

Chess was played initially in East Asia, then it came to central Europe from two different directions—from the West, thanks to the Arabic expansion, and from the East, from Russia. Depending upon the country, different modifications were made. In Poland chess terminology was influenced by both sources: the West (German *Runner*, French *Tower* or British common name of the *Queen*), the East (Russian *Vizier* stands for Polish *Hetman*, both signifying the *Queen* in the Western tradition) or especial the name of the *Jumper* (also having a common Eastern name of the *Horse* or *small Horse*). This truly central European location of Poland can exemplify how rich human tradition is, as it draws from many sources. This can be a starting point for the recognition of merits of individual cultures.

If the teacher is keen on working with speech sounds in the first or foreign language, the chess rules can be expressed by small rhyming forms or counting-out rhymes. It is a very appropriate form for training the memory of the seven-year-olds. These small forms can be developed into full theatrical plays based on a single chess game. During the rehearsals pupils learn some chess rules and perform as if they were chess pieces. In the Middle Ages, the theatrical plays based on chess were held at court as a form of entertainment. Nowadays, organizing them can be a great idea of a spectacle ending a school year.

Thanks to its long existence, the chess game can be an inexhaustible inspiration for language-focused work. Numerous anecdotes from chess players can illustrate human behaviors or attitudes. It is not all, there is also a mathematical dimension to explore.

[4] Hetman was the main commander of the Polish military forces from the 16th to 18th century.

### 4.2. Learning mathematics through chess

The center of the mathematical activity is to solve problems, sometimes trying different ways, including wrong ones. Playing chess generates problematic situations challenging the players to find selected solutions from among many good ones. It can be accompanied by a presentation of arguments, followed by a discussion about possible consequences—which should stimulate pupils to gradually reason in an abstract way, at least, in later stages of their contact with chess.

The first mathematical concept that pupils face in the game are the numbers on the chessboard. They already know the integers, but writing them by hand is still to be developed. Numbering the eight ranks on the photocopied chessboard is a very useful exercise, especially when they have to do it from the perspective of the white pieces and next from the perspective of the black ones. Furthermore, the pupils can also make the chess notation on movements during a small exercise. The teacher gives pupils a diagram depicting a problematic situation and their task is to predict and note the next movement, e.g.: 1. Bc1-f4.[5]

Seven-year-old children, according to the instructions, perform mathematical compositions and decompositions. When they see the individual pieces and then count them, they can identify the chess army. Eventually, they can observe that pawns constitute *half* of the pieces. They likewise see that some pieces are *single* and others (i.e. Bishops, Knights and Rooks) are *double*, and that the armies of Whites and Blacks have identical composition.

The study of the four operations (addition, subtraction, multiplication, division) can be illustrated in chess by considering the piece value: one Bishop or Knight is worth three pawns, one Rook is worth one Bishop and a pawn, one Queen is worth two Rooks or Two Knights and a Bishop, and so one. The teacher can ask: What is the pawn value of the whole army, excluding the King?

In the battle simulation (studying taking action), it is possible to make a count of the army value after each capture.

The concept of multiplication is illustrated by chessboard *via* a small counting-out rhyme:

[5] The chess notation is an important skill for students who will participate in tournaments where notation is mandatory. The introductory methodology to chess notation is presented in the author's guide for teachers but its rules can be found on the Internet, e.g. at Chessable blog. https://www.chessable.com/blog/chess-notation-for-beginners/.

eight by eight
is sixty four
I'm learning chess
on the ground/first/second floor[6]

Multiplication can be also practiced by exploring the extent of the movements of the Knight and the Bishop. The extent of the movements of the Knight depends mainly upon its placement on the chessboard and the presence of other pieces (especially of the same color) upon their landing square. In the Bishop's case, its position on the long or short diagonal is important and it also depends on the presence of other pieces on its trajectory. So, for example, the Bishop on the peripheral squares (band span) will have only seven movements possible (on the empty chessboard), but at center position it can reach 13 squares. It means its attacking possibilities are nearly doubled. In the Knight's case the disproportion is bigger: on the corner squares it reaches only two squares, and doing the "Knight rose" it reaches eight squares. It means his force is quadrupled.

Division can be mentioned at the moment of discovering the chessboard "geography": the player's and the opponent's half, the Queen's or the King's side, the center or the band span on the chessboard.

Finally, the game of chess constitutes an introduction to geometry. Lines or diagonals are explained with the piece's moves. Localization in two-dimensional space and introduction of the coordinates is necessary for the chess notation. The activity which can help this, in a very individual dimension, is to make each pupil an inhabitant of the chess world. The players have to throw an object (a small and flat one) at the garden chessboard, the square where the object lands becomes their homeland. In order to know the address of the "parcel", we use two crossing lines, one marked with a letter and the other marked with a number. The place where the two lines cross indicates a point where the object is.

The address of the square is formed by the letter marking the first line and the number marking the second line. In this way, pupils learn how to identify the localization in two-dimensional space. Another geometry concept is that of the set. The sets of objects belong to different categories. The pupils are asked to form sets based on a single feature, such as, colors, shapes, school objects

[6] This counting-out rhyme was created by the Author of the present article and illustrates the way to fulfill different needs concerning vocabulary learning, mathematical topics or musical purposes.

(ruler, eraser, pen, pencil, sharpener, crayon, marker, glue), cuddly toys, etc. Pawns of each color can be replaced by a chosen set of other objects and the chess pawn exercise can be done with these objects.

In addition, at the primary level of education, memorizing the openings and endings of the game is a common way of studying chess. It helps young players to feel more comfortable. Another way to increase the memory capacity is by counting different variations of moves.

### 4.3. Learning Art activities through chess

Art activities connected with a chess topic can be various and depend on teacher know-how. Propositions below are examples operating on different kinds of art expression which can be a source of inspiration.

In order to develop small motricity, pupils can make gadgets for pawns or figures. These gadgets are useful both to play the role of the piece on the big chessboard or for a theatrical performance. Each pawn can wear white or black pendant made with a white or black medallion. Pupils cut out of thick paper a circle (for example, of 20 cm diameter), then glue the ribbon to hang it on the neck. They can also make crowns from a pattern (crowns with a cross for Kings, adorned ones for Queens) or swords for Knights and miters for Bishops (in the Polish version, it will be ancient looking rolls of letters).

If the concept of *Chessland* is developed, each kid becomes an inhabitant of the chosen parcel and s/he can decorate this square with her/his blazon. Other typical exercises are: coloring or drawing different pieces, then matching pictures with the pieces' initial position on the chessboard, linking pieces names to their icons (pictures of pieces can be borrowed from ancient or exotic chess illustrations). Different shapes of pieces, for example, formal two-dimensional shape, drawing, photo of Staunton classical pieces can be used to produce card games like "Seven Families" or "Old Maid."

Big motricity is developed by playing the roles of pieces—for example, movements of Kings in relation to each other, or playing the Knight in the center touching its reachable opponents. Simple gestures or mimicry can be enriched by a whole choreography: a dance can be performed by the King and the Rook at the castling occasion, a duel when a piece is taken. It is plausible to prepare the theater play, covering an entire short chess game, for the end of school year. The text of the play can include the master chess rules and if they have a rhyming form, they have the chance to be life-remembered.

Children can make pictures as an evaluation for chess activities. The presentation of their works is an occasion to express their feelings about the chess game and to provide the teacher with important feedback.

## 5. Conclusion

The chess game provides entertainment and offers great possibilities for learning. The game requires strategy, tactics as well as emotional, intellectual and physical preparation. The teacher can offer this to his/her pupils at the proportions s/he judges appropriate. In one case, the stress can be placed on physical education, in another on mathematical concepts. The main idea is to make them aware of the chess problems and, from the teacher's point of view, try to determine who is ready/motivated to study chess in the usual way.

In the future perspective, the whole project could be complemented by the introduction of a new element, namely the foreign language immersion. It has been proved that foreign language acquisition is more effective if it is based on a non-linguistic domain (language for special purposes). So, it is worthwhile to test learning effectiveness in the case of presenting chess content in a foreign language.

The benefits of the implementation of this project can vary. First of all, the pupils' motivation can increase because of this particular connection of two different dimensions: chess and a foreign language. Another benefit, promoted by the European Union, is the possibility to introduce this new learning method, combining learning chess and foreign languages, in each member state. This project can prove a workable means of encouraging young people to become enthusiastic about chess.

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# The Directory for Catechesis and Family Catechesis in Slovenia

## Abstract

The article's author presents family catechesis as one of the possible forms of catechising children. The foundations of family catechesis are found in the New Directory for Catechesis where it is clearly stated that catechesis starts in the family. In Slovenia, the family catechesis was born "from the bottom-up", at the request of a group of parents. In the beginning, it was an alternative option, but today it is considered equal to other forms of catechesis. Children and young people, who participate in this catechesis together with their parents, may receive the sacraments of first Holy Communion, Confession, and Confirmation. After ten years of experience, the results are positive and open new catechetic ways and possibilities. This is a new approach, a new method, for which *the Directory for Catechesis* says: "Catechesis does not have a single method, but is open to evaluating different methods, engaging in pedagogy and didactics and allowing itself to be guided by the Gospel necessary for recognizing the truth of human nature" (*Directory for Catechesis* no. 195).

## Keywords

family catechesis, *the Directory for Catechesis*, parents, Slovenia

In this article, we strive to evaluate family catechesis in Slovenia in the light of the *Directory for Catechesis* from 2020. In the last century, many changes occurred in the Slovenian social-political and religious contexts. After the Second World War, Communism came to power which put the Church and faith on the sidelines. Thus, until the end of 1951, religious education was still taught in schools as a weekly, elective subject. Religious education students were monitored and counted and they were encouraged to stop attending religious education classes. This was followed by an encyclical from the Diocesan Ordinariate in Ljubljana, which on 25 February 1952 in Point 4 read: "Teaching religious education classes is, according to the order by the Government Council of the LRS for education and culture, cancelled in all school buildings as of the second semester of the 1951/52 school year, i.e. from 1 February 1952." This was a huge shock for catechesis. The Church in Slovenia looked for ways to preserve catechesis and to reach children, adolescents, and families.[1] With the occurrence of secularisation, it came to be that both in Europe and Slovenia, religious education was increasingly becoming a domain of formal programmes,[2] since parents were no longer capable of assuming the responsibility for the religious formation of their children. On one hand, the Church strived to give value to the role of the family, while on the other, it was the family that was becoming more and more passive.[3] Today, families still feel the Christian tradition and are aware of their roots. Frequently, however, they are a long way from living a practical Christian life.[4] Thus, the historical development led to the point where many parents remain passive believers, while still wanting to provide their children with religious education. Hence, they 'send' them to religious education classes and Holy Mass. This means that parents basically assume the role of drivers. It is understandable then, that children consider the role of religious education to be the preparation for the Sacrament of Confirmation. Namely, parents often encourage their children saying: "Stick with it until Confirmation, maybe these

[1] Cf. A. Šegula, *Katehetsko področje dela v slovenskem prostoru po drugem vatikanskem koncilu,* »Bogoslovni vestnik« 73 (2013) 2, pp. 279–287.

[2] Cf. D. Kraner, *Sodobni učitelj, komunikacija in resonanca v odnosih,* »Bogoslovni vestnik« 83 (2023) 1, pp. 227–239.

[3] Cf. J. Stala, *Parents Catechesis: for Children, Familiy or for Adults?,* »The Person and the Challenges« 13 (2023) 2, pp. 37–51; H. Lombaerts, E. Osewska, *Family and Family Catechesis. A Matter of Diversification*, "Acta Paedagogica Vilenensia" (2008) 20, pp. 225–243.

[4] Cf. D. Kraner, *L'approccio pastorale dialogico alla luce del Sinodo*, "The Person and the Challenges« 13 (2023) Nr 1, pp. 173–187.

sacraments will be useful for you one day!" Therefore, we are dealing with two extremes: on one hand, there are families in which children grow up and foster environments without religious education and on the other, catechesis classes which are, considering the circumstances, frequently too short and not effective enough. This is a generation of parents who either have not had much religious education or were not involved in the life of their parish, by participating in married couples' groups, or other ministries. Considering this, we can understand that in *the Directory for Catechesis* (2020), re-examine the role of catechesis and RE in our contemporary situation and the Roman Catholic Church strongly emphasised that catechesis is a process that lasts from birth until death. Here, we can see the gap between the guidelines of the Church and the actual state of catechesis in Slovenia.

Indeed, the field of catechesis is in a transitional phase. Some families live their faith and raise their children accordingly, while others do not live their faith but want their children to receive a basic religious formation. Hence, children are sent to religious education. As we contemplate this, we cannot overlook *the Directory for Catechesis*,[5] whose guidelines aim to help all who work in the field of catechesis. Every revised edition of the Directory for Catechesis indicates that the Church wants to monitor catechetical work and development and respond to actual challenges of the time.

In the Slovenian context, family catechesis was formed as a response to actual circumstances and is increasingly becoming the answer to the situation at hand. It is a form of catechesis that not only includes children and adolescents but also their parents. This could be called comprehensive or holistic education.[6] It does not involve only children and youth but all family members. This article will introduce the guidelines of the New Directory for Catechesis, pertaining to family catechesis and the creation, development, and the state of family catechesis in Slovenia.

[5] *Directory for Catechesis.*

[6] I. Nežič Glavica, *Der Beitrag der integrativen Gestaltpädagogik nach Albert Höfer im Bereich der holistischen Religionspädagogik, »*The Person and the Challenges« 9 (2019) 1, pp. 205–223.

## 1. The Place of Family And Family Catechesis In the New Directory For Catechesis

The fundamental document in the field of catechesis is the Directory for Catechesis. Soon after the Second Vatican Council, a General Catechetical Guidebook was created, which was approved by Pope Paul VI on 18 March 1971. It was prepared by the Dicastery for the Clergy. St Paul VI perceived the entire Council teaching as "a great Catechism of modern times".[7] On 7 June 1973, the International Council for Catechesis was founded, a group which, assisted by experts from around the world, helped the competent dicastery to recognise the needs of individual Churches, in order for catechesis to fit ecclesiastical, cultural, and historical circumstances. Thirty years later, Pope John Paul II published the *Catechism of the Catholic Church*, which was to serve as the basis for the composition of local catechisms. In 1997, *the General Directory for Catechesis* was published and remained in use until it was replaced by the current *New Directory for Catechesis*. The latter was approved by Pope Francis on 23 March 2020. We will use the name *Directory for Catechesis.*

These last two directories followed publications of certain important documents of ecclesiastic teachers. The first document was a response to Council teachings, the second one to *the Catechism of the Catholic Church*, while the present one is a response to the Synod on the New Evangelisation for the Transmission of the Christian Faith and the apostolic exhortation *The Joy of the Gospel—Evangelii Gaudium* by Pope Francis (2013). With all three editions we have to be aware of a wider social context that influences the content and form of the directory. A new feature of the last directory is a deliberation on the digital culture and globalisation.[8]

Chapter 8, entitled "Catechesis in the Lives of Persons," presents catechesis as it relates to the family. It highlights that the family is a community of love and life shaped by different relationships—marital, paternal, maternal, those of children and siblings: all of these introduce every human being into the human family and into God's family, which is the Church.[9]

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[7] Pavel VI. *Govor članom splošnega zasedanja Italijanske škofovske konference (23. 6. 1966),* in: *Insegnamenti di Paolo VI,* IV (1967).

[8] *Direttorio per la cathechesi,* pp. 11–12.

[9] *Direttorio per la cathechesi* 226.

The directory shows the importance of family catechesis and explains the following concepts:

1. Catechesis in the family. The family is the place of catechesis, the place of delivering the Gospel by placing it into the context of deep human values. Catechesis in a family has the task of enabling the protagonists of family life, primarily spouses and parents, to discover God's gift which is bestowed upon them through the sacrament of the holy marriage.
2. Catechesis with the family. The Church announces the Gospel to the family. A community of families refers to several families supporting each other. This means that they give each other support and strength. Thus, the Church announces the Gospel to families, which allows them to experience the Gospel as joy that fills the heart and one's whole life. The kerygma comes first, because in family pastoral care the first announcement must always resound; it is the most beautiful, the greatest, the most attractive, and also the most needed message and therefore must be at the centre of evangelisation.
3. Catechesis of the family. Here, the directory stresses that the family announces the Gospel. If a family is founded on the sacrament of a holy marriage, it becomes a domestic Church and has its missionary dimension and thus participates in the evangelical mission of the Church. Through natural service of child rearing, the family is called upon to participate in the formation of the Christian community and to testify for the Gospel in society.
4. Pastoral instructions. This title of the Directory encompasses wide topics. With pastoral instructions it hopes to move closer to all pastoral workers in the pastoral care of the family. Here, it speaks about the catechesis of youth and adults preparing for marriage. The Directory proposes the catechumenal model. It continues with the catechesis of the newlyweds, which is a mystagogical catechesis for recently married couples. In the context of sacramental pastoral theology, catechesis of parents who ask for baptism of their children is important. Then, there is intergenerational catechesis which foresees the path of faith marked with indirect educational experience for people of all ages. At the end, it emphasises that the catechists in married couples' groups and family groups are the married couples who are their members.[10]

[10] *Direttorio per la cathechesi* 222–233.

The Church does ignore new circumstances brought about by life. The view of the family is changing, in some cases even the definition of the family is changing. The number of marriages and families experiencing various crises is increasing. Families are wounded and fragile, the family connection with the divine is disappearing. Despite great confusion, there are still many people who desire an ordered family, with settled relations, and the correct attitude towards the transcendent.[11]

The important thing is that the Church wants to be with these families regardless of how wounded or imperfect they are. It wants to accompany them and restore their trust and hope.[12] The Directory underlines that every community is aware of various family realities with all of their positive and dark sides, accompanies them in an appropriate manner, and recognises the complicated circumstances without resorting to idealising or negativity.[13] Catechesis does not aim to be elitist, not reserved for the chosen ones, but meant for everyone. In truth, catechesis is about reciprocity. We are not passive receivers, we enrich one another.

## 2. Family As the First Place of Catechesis

The family has always been the place of the first catechesis.[14] Perhaps there was a time, when faith was much more common and practical than today, people

[11] Cf. I. Platovnjak, *Družine s predšolskimi otroki potrebujejo pri svojem poslanstvu posredovanja vere več razumevanja, sprejetosti in bližine v Cerkvi na Slovenskem*, »Bogoslovni vestnik« 80 (2020) 2, pp. 358–369; I. Platovnjak, *The Importance of Marriage Groups for Marriage and Family Life. A Survey of Our Way Marriage Groups*, »Obnovljeni život« 78 (2023) 4, pp. 480–490; E. Osewska, *Društvena kohezija: sadašnje stanje obrazovanja i trajne stručne izobrazbe vjeroučitelja u Poljskoj u kontekstu društvenih promjena*, „Kateheza" (2012), pp. 152–158; H. Lombaerts, E. Osewska, *Family and Family Catechesis. A Matter of Diversification*, "Acta Paedagogica Vilenensia" (2008) 20, pp. 225–243.

[12] Cf. T. Stegu, *Lepota in kerigma v tehnološki dobi,* »Bogoslovni vestnik« 83 (2023) 4, pp. 1024–1025; B. Simonič, E. Osewska, *Experience and Consequences of Growing Up in a Family with Alcoholism in Adult Children of Alcoholics*, "The Person and the Challenges" 13 (2023) 1, pp. 63–81.

[13] Cf. I. Nežič Glavica, *Družina—„skriti" potencial Cerkve,* in: J. Vodičar, *Vemo namreč, da ste izvoljeni! Od klerikalizacije do sinodalnosti v pastorali in katehezi*, Ljubljana 2022, Teološka fakulteta Univerze v Ljubljani, pp. 49–57.

[14] Cf. H. Lombaerts, E. Osewska, *Family and Family Catechesis. A Matter of Diversification*, "Acta Paedagogica Vilenensia" (2008) 20, pp. 225–243; *Religious Education/Catechesis in the Family: A European Perspective*, eds E. Osewska, J. Stala, Warszawa 2010, UKSW.

lived their faith (morning prayers, a prayer before work, a prayer before a meal, a prayer during a storm…) and catechesis simply "happened," so to speak. In this tradition we seek inspiration for the home catechesis of today.

Things were changing rapidly in the time after the Second World War. The socio-political situation led catechesis into a great crisis. First, there came the separation of the state and the Church. Religious education was moved from schools to parish premises.[15] We must realise that there were no catechisms or other catechetic aids at the time. Borders were closed and many priests tried to do what they could with their own ideas for catechesis. In this context, the catechesis in the family also suffered. The division of state and Church led to the classification of the people. People of faith became second-class citizens overnight. Consequently, they were becoming increasingly frightened. Faith became a 'private matter' and moved from the public sphere to the 'sacristies'.

During the transitional period, many parents became passive Christians because they were afraid to expose themselves or publicly admit that they were Christian. People in certain professions (teachers, doctors, nurses etc.) were prohibited from publicly declaring their faith. People searched for their 'modus vivendi' and gradually became tepid Christians, Christians behind walls. It should be said that grandparents played an important role in catechetic upbringing, since they had time for it and were deeply rooted in faith. Hence many people, who no longer practiced their faith, were baptised and religious upbringing (catechesis) became merely an external commitment. Many parents said: "We'll send our child to Religious education until Confirmation, since it may come in handy one day (e.g. to be able to get married in a church), but after that…" This is the environment and the atmosphere in which the domestic "Church" was slowly extinguished. Family prayer time was decreasing, and there were practically no discussions about God and religious matters, all that was left were major religious holidays, such as Easter, Christmas, and parish feast days. This situation continued for many years, even decades. It created two worlds, two poles: on one side there were families who still declared themselves Christian but in which many traditions had already died out. On the other side was the parish and parish catechesis trying to evangelise them. The problem was that children, and everybody else coming to catechesis, came without any basic knowledge. For catechists this presented a great dilemma—what to do about

[15] Cf. *Okrožnica škofijskega ordinariata ljubljanske škofije* 3 (1952) 1, tč. 4.

it and how to achieve the goal? The span of knowledge and religious experience is vast, sometimes too vast.

As years passed, a model of catechesis formed which had previously lost all its life strength. Catechetic groups were preserved while parents grew distant from the Church and disappeared from the realm of religious education. Often, one could hear that religious education is the task of the parish (catechesis in the parish). This meant that the fundamental structure in the catechesis field was demolished.

In this Slovenian catechetic landscape, family catechesis was "born", which is in its own way original and interesting. It is interesting because the initiative came from parents. Hana Strajnar, a mother of several children, considers family catechesis an excellent alternative to ordinary religious education classes because it promotes a connection with the parish which is why they are happy to participate in various activities that it offers. Their family members discover new talents in each other and together they search for God in their lives.[16]

## 3. Family Catechesis in Slovenia

Family catechesis (Veseli kristjani—Joyful Christians) started developing in the parish of Domžale prior to the 2012/13 religious education year, when the first family catechesis group started operating in Domžale. At the beginning, three sisters from the Podjavoršek family participated in the creation of the programme. The idea came from the parents and "permission" was given by the local priest. Today, family catechesis is alive in several parishes.

Family catechesis is catechesis for the whole family at the same time. It presents an opportunity for all the parents who want to deepen their religious knowledge together with their children. Meetings take place every week of the religious education school year and last 60 minutes. Every year, in addition to the opening and closing meetings, there are approximately 24 regular meetings and 8 special ones. Catechesis is prepared for parents and all children through eighth grade, while older children participate in family catechesis as mentors of preschool children.

[16] Cf. *Družinska kateheza (nov pristop k verouku) se uspešno širi tudi po Ljubljani*, https://www.iskreni.net/druzinska-kateheza-nov-pristop-k-verouku-se-uspesno-siri-tudi-po-ljubljani/ (03.05.2024).

Children participating in family catechesis do not have to attend "traditional" religious education classes. The exception are those years in which children prepare to receive the sacraments (First Communion, Confirmation), when they join other students at the parish for sacramental preparation. Initially, First Communicants attended religious education classes with their peers for six meetings before receiving First Communion. However, since First Communicants at the parish attend a weekend retreat, they join them for this occasion. Confirmation students from family catechesis also join the Confirmation groups that take place in the parish in addition to their regular classes.

Regarding the content, children and adolescents in family catechesis cover all the important life questions. A noticeable difference is also in their report card, which is similar to the report cards of all other religious education students but does not include grades because knowledge in family catechesis is not graded. One of the reasons for this is that faith cannot be graded, while at the same time the families do not want catechesis to be considered just another school class. The entire programme of family catechesis is designed in such a way that children and adolescents learn as much as possible. They receive the knowledge and awareness of what it means to be a Christian, how to interpret the Bible, and form opinions on matters happening around them and within them. After all, the latter includes understanding of feelings, which is a crucial part of overcoming life challenges and insecurities and is also key to understanding the Bible. This accompanies faith with feelings and is directed to solace, devotion, or hope.[17] "If the path from physical contact with the holy to the hermeneutics of hope is walked fruitfully, a person will be able to recognise God's signs in everyday life."[18] Occasionally, their knowledge is "checked" with quizzes.

Family catechesis does not involve traditional homework. The main homework is active participation in the parish and attentive listening to the Sunday gospel. In the parish, they can participate as singers, altar servers, lectors, actors in the Passion play, collectors of the offering, church cleaners, landscape workers, etc. Every person participates in the way that most suits them and their family.

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[17] M. Centa Strahovnik, *Čustva in vloga telesa v kontekstu biblijskih zgodb*, »Bogoslovni vestnik« 83 (2023) Nr 3, pp. 581–595.

[18] J. Vodičar, *Holarhični model celostne resonančne pedagogike za novo katehezo*, »Bogoslovni vestnik« 82 (2022) Nr 3, pp. 691–704.

Every year they prepare a weekend retreat, where they have an opportunity to go deeper together. During this weekend second graders prepare for their first holy confession. During the parish First Communion retreat, children from family catechesis make their second or third confession while others make their first.

Within family catechesis there are also numerous informal gatherings (bicycle trips, hiking, camping at the sea, Shrovetide celebrations, etc.). Informal gatherings are not mandatory but help people get to know each other better and recognize that in this big family they are called into community. It is suggested that every family join at least one such gathering. Parishioners who are not part of family catechesis are also invited to these activities. They are aware that family catechesis must never become a closed group within the parish. It must always be open to all parishioners.

Family catechesis can also be joined by families in which Christian education is provided by only one parent. One-parent families and families in which parents have not yet decided to get married can also join. The only condition is that in addition to a child, at least one parent attends catechesis and that they have the desire to deepen their faith.[19]

Family catechesis mostly meets weekly. In Gornja Radgona, they decided to have monthly meetings, each grade separately. The general flow of these meetings is: first, they all pray and sing together. Then they divide: children go to a classroom with a catechist while the priest remains in the main meeting space with the parents. After 45 minutes, children return and present what they have learned and show the crafts that they made. Parents are handed the material for catechesis at home for the next three weeks. They end with a prayer and a blessing of families. The children perceive this type of religious education less school-like and are more involved than in traditional classes. With this type of work, the weight of responsibility for religious education is shared. Parents are a child's primary catechists. The priest is the parents' support since at the meetings they discuss the church year and answer questions arising from homework. The parish priest says that after five years of family catechesis, results are already showing, but will be even more visible in the future. Working with parents on monthly basis for a few years in a row and regular celebration of Masses will certainly help to make them more aware of their mission. This helps Christian

[19] Cf. *Kaj je to družinska kateheza (Družinska kateheza Veseli kristjani)*, https://natalijapodjavorsek.splet.arnes.si/?page_id=2535 (22.03.2024).

families and the Church, the foundation of which are families. The parish also gains through this since new volunteers are "born" among parents.[20]

## 4. Conclusion

The model of family catechesis proves that this is one of the most effective ways of comprehensive catechesis. In 77 of *the Directory for Catechesis* we read that the catechesis of adults is the crucial form of catechesis if it is intended for people who are capable of a truly responsible consent.[21] This means that, first and foremost, family catechesis is intended for children, while parents are simultaneously included in the process (at least one of the parents). *The Directory* explores the importance of catechesis in the family, with children, parents and members of families. This a clear invitation the local Churches to give consideration to catechesis with all the various people and groups. This form of catechesis is also the response to the invitation of Pope Francis in the Post-Synodal Apostolic Exhortation *The Joy of Love—Amoris laetitia* (19/03/2016), in which he wrote: "Enabling families to take up their role as active agents of the family apostolate calls for "an effort at evangelization and catechesis inside the family."[22]

Thus, family catechesis is becoming a parallel form of catechesis. This means that it does not abolish the set classical form but rather brings a new approach that, within a short time, proved to be a good alternative. Not only is it better in approach and content, but also in the method which includes parents, consequently including adults in the process of catechesis. The head of the secretariat of the Slovenian Catechetic Office and the head of the pastoral service in the Murska Sobota Diocese Dr Franc Zorec believes that family catechesis is the original form of catechesis and is an encouragement for the entire family to live a life according to their faith. Thus, family catechesis is a privilege for those children whose parents want something more in the spiritual field.[23]

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[20] Cf. *Družinksa kateheza—primer dobre prakse*, https://www.druzina.si/clanek/druzinska-kateheza-primeri-dobre-prakse-foto (03.05.2024).

[21] *Pravilnik za katehezo no 77.*

[22] *Amoris Laetitia 200.*

[23] Cf. *Družinksa kateheza—primer dobre prakse*, https://www.druzina.si/clanek/druzinska-kateheza-primeri-dobre-prakse-foto (03.05.2024).

In the future, this model of catechesis could be used in the preparation of adolescents to receive the sacrament of Confirmation.[24] This method could be introduced a year or two prior to Confirmation for the entire family (and if possible, also for the Confirmation sponsors). Hence, Confirmation catechesis would include not only one or two meetings prior to Confirmation but rather a thorough, in-depth comprehensive preparation including the entire family. This type of preparation could justifiably be called 'new' evangelisation. However, the realisation of such initiatives is still greatly dependent on pastoral workers in parishes, their catechetic teams, and their courage.

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# Changes in Religiosity as a Challenge to Family Catechesis: the Situation in Poland

## Abstract

The concept 'catechesis' has always been vital to pastoral mission in the Roman Catholic Church and has been used officially with a basic fidelity to its etymological roots (an echoing of faith between believers and with fidelity to its context in the early Christian Church (systematic formation and participation in experiences within a faith community). However today, when the official Roman Catholic Church documents recall family catechesis, at the practical level, family catechesis is still ambiguous. This article opens a new window on a very topical issue in contemporary catechesis: strengthening the family as an important agent of catechesis. The author (taking into consideration the changes of religiosity of Catholics) proposes different models in which the family can be supported to assume its primary function as an educator for the faith using the example of Poland.

## Keywords

Poland, changes in religiosity, models, family catechesis

Poland, like many other countries in Europe, is undergoing numerous changes of a religious nature. However, unlike the majority of countries in the European Union, Poland is still quite homogeneous in terms of culture, which influences its religiosity. What surprises many tourists who come to Poland is the fact that, despite strong migration movements, it remains a uniform country as far as nationality, culture and religion are concerned. Most of Poland's 39 million inhabitants are Christians (mostly Roman Catholic, with Orthodox Christian groups on the eastern parts of the country and Protestants in the south of Poland). Even though unwelcome changes become noticeable, they are much more gradual here than in the countries of Western Europe. According to CBOS[1] survey of 2018, many Poles still regard religiosity as a significant part of their social life. Invariably, systematic studies have shown that since the end of the 1990s, over 90% of respondents (92%–97%) consider themselves to be believers. At the end of 2018, 92% considered themselves to be believers, with every twelfth Pole regarding their faith to be deep (8%). The number of people who perceive themselves as 'rather non-believers' or 'complete unbelievers' has been relatively low for years (3%–8%).[2] After Poland joined the European Union in 2004, the percentage of non-believers has risen (8% now), while the ratio of deep believers, as well as non-believers, has remained nearly the same.[3] These alterations in religiosity call for careful interpretation as to their fallout and future development. Changes in attitude among young people, as seen in the media and social networks, may be considered especially ominous.

It is surely a mistake to assess these changes one-sidedly and cry havoc. However, they pose a challenge to catechesis and pastoral activities of the Roman Catholic Church, including new forms of family catechesis.

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[1] CBOS—Center for Public Opinion Research, an opinion polling institute based in Warsaw.

[2] Cf. R. Boguszewski, *Religijność Polaków i ocena sytuacji Kościoła katolickiego*, https://cbos.pl/SPISKOM.POL/2018/K_147_18.PDF (10.08.2023).

[3] Cf. R. Boguszewski, *Religijność Polaków i ocena sytuacji Kościoła katolickiego*, https://cbos.pl/SPISKOM.POL/2018/K_147_18.PDF (10.08.2023).

## 1. Directions of transformation of contemporary religiosity

Nowadays, one may point to several characteristic features of religiosity which pose a significant challenge to the religious formation of the human person. The results of religious self-declarations, confronted by rather negative upshots of the analysis of attitudes and beliefs, are food for thought and induce us to explore contemporary religiosity, draw conclusions and take adequate pastoral steps. Studying and analysing religiosity is undoubtedly a difficult and complex process, both in terms of research and its interpretation. When one puts aside detailed and debatable issues, one may detect characteristic features of the present religiosity which, in a way, translate into a new form of devotion, with new traits and functions, when compared to its previous forms. Certainly, proclaiming the death of religion in society and culture is wrong. The contemporary sociology of religion no longer presages the end of religion. Rather, it focuses on the gradual opening of contemporary human being to spirituality and the sacred, though in a new way. The secularization process does not necessarily mean renunciation of religion, but a change of its form, character and functions.[4]

Gradually, a more private model of faith in God is being established, with no need to belong to the Church or to practice. One can notice alterations in attitudes with regards to acceptance of the teachings of the Church, and the need to be close to the institution or parish structures. Many truths are less and less known and understood, which intensifies the discrepancy between the Christian doctrine and religious awareness of the contemporary human being who, in the doctrinal and moral sense, accepts the truths of faith selectively. Some people who consider themselves to be believers or even attend the Church regularly, do not to believe in the fundamental tenets of faith. There is a growing variance between the normative teaching of the Church and its acceptance by the faithful. On the whole, faith becomes de-institutionalized, privatized and individualized. Selective Catholicism, together with criticism of the institution of the Church, are on the rise.

In the present culture of pluralism and freedom, faith is less and less inherited through culture and through the influence of one's social environment. Rather, belief or unbelief, is the result of one's personal choice, though not always a conscious one. Many young people decide to abandon Christianity under

[4] Cf. J. Mariański, *Charakterystyka religijno-moralna współczesnej młodzieży*, in: *Katecheza młodzieży*, ed. S. Kulpaczyński, Lublin 2003, pp. 15–70.

the influence of the media, social networks, their peers, or the latest craze. Choosing faith is becoming more and more of an unaided step, which entails both opportunities and risks. The new attitude towards religion is more about religious experience than Church teaching, more about what is personal and private than institutional and official.[5]

Religiosity in the contemporary circumstances is changing its form: it assumes a strong existential character, becomes a significant part of one's life and gives aim. However, it also becomes 'fluid' and changeable, strongly internalized and oriented towards religious experience. The concept of 'private religiosity' is the keyword as regards the analysis of religious transformations. It refers to searching for the meaning of life that may be experienced and lived, takes various forms, and refers to manifold dimensions of existence.[6]

From the pastoral point of view, it is worth mentioning that family catechesis focused on awakening, developing and strengthening faith, is considered more natural than parish catechesis, as it is 'tied with the rhythm of family life and Christian education that takes place through witness. What is more, it is a steadier and daily form of education rather than divided into terms.'[7] Thus, family catechesis produces a sustainable outcome and, when supported by Church catechesis, it may appear as the most effective means of formation of both Christians and the entire family communities.

## 2. Proposals of models for family catechesis

The above-mentioned sociological picture of changes in religiosity is surely not a complete or the only view of religiosity. Moreover, making predictions is always risky. However, expressing regret over the crisis of traditional structures of faith is not an adequate solution, neither is clinging to them. It is necessary to understand current alterations and search for new models. One cannot focus solely on 'traditional' ministry permeated by the idea to develop piety and strengthen sacramental practice. We must take actions of pastoral and catechetic

[5] Cf. J. Mariański, *Religijność społeczeństwa polskiego w perspektywie europejskiej. Próba syntezy socjologicznej*, Kraków 2004, p. 176.

[6] Cf. R. Polak, *Tęsknota za Bogiem. Wyzwania pastoralne w Europie w kontekście procesów transformacji religijnej*, „Homo Dei" 78 (2009) 4, pp. 13–20.

[7] Kongregacja do Spraw Duchowieństwa, *Dyrektorium ogólne o katechizacji*, 15 VIII 1997, Poznań 1998, 255.

character that contribute to evangelization and formation of mature personal faith. It also seems reasonable to recognize the value of certain solutions present in the European thought. Even though we cannot compare the Polish situation to the changes taking place in other parts of the world, the initiatives taken there may provoke reflection and further studies. The essential question is: What kind of purpose does faith offer to human being in everyday life?

Pastoral renewal involves the need to look carefully at catechesis and seek such forms that will meet the requirements of the present culture. In a situation where individualization and privatization of faith are growing, the family, as the community of persons and basic catechetic milieu, gains importance. It is worth remembering that catechesis should not be limited to teaching catechism or transmitting the word of God, even though proclaiming Jesus Christ is an essential value here. Catechesis is a long process of awakening, developing and deepening faith which takes place in everyday life (testimony of faith, the community, liturgy of the Church, charity actions, prayer, morality). It is always an echo of encountering Jesus Christ. Hence, I am going to demonstrate certain models of family catechesis adapted to various levels of religiosity within a family, its structure and socio-cultural background. Surely my proposals may be modified and adapted to the needs, expectations and abilities of a given family.

### 2.1. A Model of support given to the family

When the adult members of a family hardly fulfil the task of education in their faith, though they still 'keep in touch' with the Church, the model of help (support) to the family will be suitable[8]. Here, the parish or Catholic school undertakes activities for the sake of the family, while the family's responsibility is, for example, to inform the catechist or religion teacher of the needs and problems noticed in the children. However, it is crucial to strengthen the awareness of parents, as merely emphasizing the task of transmitting faith within a family is not sufficient; sometimes it is even rejected by the family which perceives it as yet another task to be carried out. Therefore, it is necessary to promote family catechesis (in a narrow and broad sense) in a wise, responsible and interesting way. In the narrow sense (which may be compared to applying a specific medicine), we must remind the family that belonging to Jesus Christ

[8] Cf. E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, pp. 13–20.

is the centre of the Christian identity; it is initiated by the grace of baptism and lived in faith through one's whole life. Thus, the Christian identity entails a constant conversion to God. Clear and simple communication is required here. If parents recognize that being close to Jesus Christ is valuable, then they will engage in an integral education of their child, including education in the faith. Instead of pointing out the duty of transmitting faith, we may show the value of an integral education that encompasses education in the faith for the sake of the holistic development of a child. If a parent wants the best for their child, they will undertake all areas of education, including the initiation into religious life. Various forms of meetings with parents are central in this model since they often feel confused when confronted with the necessity of providing a religious education to their children. Therefore, it is worth organizing short, though attractive, gatherings with parents in Catholic schools and parishes, and arrange support groups of several people that will meet in homes, depending upon their needs and expectations (as part of family meetings, religious initiatives or parents' clubs).

Fewer and fewer parents are eager to participate in courses on theology or pedagogy. They would rather engage in practical workshops where they can learn practical skills, or gather in small domestic groups where they can share experiences, and thus acquire a fresh outlook on Christianity and find solutions to their problems. That is why we should promote various forms of meetings and catechesis for parents such as: online meetings, online family blogs, a website on matters of faith and education, TV and radio broadcasts, parish papers, liturgical catechesis based on the cycle of the Church liturgical year calendar, adoration days, family excursions, pilgrimages, weekend courses, marriage and family counselling, education by correspondence, involving parents in the sacramental initiation of their children, catechesis for engaged couples, sending text messages periodically, posters, printed material/books as well as audiobooks etc. It is important to indicate positive examples of educating in the faith in the contemporary world, and to make use of the latest information and communication technologies, which has been especially emphasized in the last year due to the pandemic. Thus, catechesis for families appears as the necessary form of helping the family in order that it may regain awareness of the truth about itself, deepens it and creates a truly Christian community of persons.

## 2.2. A Model of building a family community on the foundation of love

The family is the community of life. Therefore, it deserves to be called *communio personarum* more than any other community.[9] The family is, as it were, the home of the human person who is made of love and strives for love.[10] As the community of persons, it preserves the family bond by being rooted in the bond of the persons that is built on the foundation of love due to every person. The family is a collection of personal relationships initiated by marital love and complemented by parenthood. The relationship between husband and wife is the foundation of firm family ties. That is why the mainstay of the model of building a family community should be to support fiancées (and subsequently spouses) in discovering and developing of marital love, the importance and complementarity of spouses and parental bonds. Thus, shaping strong family relationships should be the basis for undertaking educational activities. The family community is a special space/area of participation where every person entrusts herself/himself to others. Through the daily actions, devotion and generosity, each person experiences love, which gradually leads to discovering God as the source of love. It is in the family that love reveals itself in the most disinterested manner through words, gestures and actions, in proportion to the capabilities of its members. Even in dysfunctional families (in terms of upbringing), the parent wants the best for his/her children who always long for closeness with their parents. The family in its core is 'love becoming real', love that—in the Christian perspective—comes from God.[11] When a child, a youth or even an adult begins to search for the meaning of life, they often refer to love. If it is experienced in the family, then by pointing to the love of its members, one may confirm the presence of God. Thus, fortifying the community of persons becomes the foundation of building a bond with Jesus Christ. In daily life, when we experience joys and hardships together, then we gradually invite and introduce God so that He nourishes and completes us. By experiencing good family relations, closeness to one's parents, and especially living in an atmosphere of love, care and kindness, human being

[9] Cf. *Gratissimum sane* 7; T. Styczeń, *Człowiek darem. Na marginesie Jana Pawła II teologii ciała,* in: *Z badań nad rodziną,* ed. T. Kukołowicz, Lublin 1984, pp. 47–51; T. Kukołowicz, *Osoba i czyn a wychowanie w rodzinie,* „Analecta Cracoviensia" (1973–1974), t. V–VI, pp. 217–220.

[10] Cf. *Rodzina w nauczaniu Jana Pawła II*, ed. J. Żukowicz, Kraków 1990.

[11] Cf. *Familiaris consortio* 18; J. Majka, *Proces sekularyzacji rodziny i problem odnowy jej religijnego charakteru*, in: *Ewangelizacja*, ed. J. Krucina, Wrocław 1980, p. 133; W. Piwowarski, *Przemiany religijnej funkcji rodziny. Problematyka i hipotezy*, „Studia Warmińskie" 11 (1974), pp. 405–453.

discovers God most easily and most fully creates His adequate image. If family catechesis is based on life according to the commandment of love, then a child may accept the concept of God's authority, his concern for the world and people as well as His revelation through Jesus Christ. St. Augustine thus attests to this: *Immo vero vides Trinitatem, si caritatem vides* (If you see charity, you see the Trinity).[12] It is also confirmed by the early Church, in which the love of the followers of Jesus Christ was a sign that attracted others to join the community.

### 2.3. A Model of organizing family life

Another form of family catechesis is the model of organizing family life. Family catechesis flows from ordinary, daily life that is understood in the light of the Revelation, and it is discernible in prayer and domestic liturgy. Moreover, it expresses and shapes the family community, as well as accompanies the natural growth of a person.[13] Special emphasis is placed on educating children in the faith, in collaboration with the adult members of a family. Psychological research reveals that the way parents and guardians communicate, exerts a significant influence on shaping the idea of God in children. For children it is important that parents, seriously and with love, turn in prayer to Someone whom they cannot see. If, for some reason, a child is devoid of family catechesis based on the testimony of life, then it will be hard for her/him to comprehend and experience the whole richness of the truth about God, who invites every man to communion with Him. It is crucial that the words of parents about God reach their children in everyday situations as their complementation.[14] Thus, the reality of faith is closely connected with everyday life as its significant element, while the education in faith becomes as natural as physical or health education. Everyday experience in a family should be plainly interpreted with reference to God. However, it is not about imparting just theological knowledge, but rather simple references to the truths of faith, including replying to children's questions and doubts. In certain situations, a common interpretation by a parent and a child leads to a re-discovery of faith by the parent. When a particular experience is expressed in words, it may be then expressed in common prayer

[12] *De Trinitate,* VIII, 8.

[13] Cf. E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, pp. 127–151.

[14] Cf. J. Król, *Psychologiczne aspekty badania fenomenu religii*, Opole 2002, pp. 143–172.

and presented to God in the liturgy of the Church. When an experience is tied with its interpretation, prayer and the Eucharist, it should be done in accordance with the principles of the Gospel. This results in a strong bond between daily life and faith. In the secure atmosphere of one's family, both adults as well as children may share their experience of faith, read the Bible, pray together, take part in the liturgy and undertake socio-moral education in keeping with the rhythm of a given family.

Many parents give up family catechesis claiming that they have no time. And yet family catechesis may be as natural as many other activities like eating, working or relaxing together. For example, praying together does not have to take long—it may be a simple, childlike response to God, with gratitude for the day, meal or joy. In many families in which children have been encouraged to be close to God from the very beginning, it is the children who remind their parents of the need to thank God, worship Him or ask for help when in trouble. Sometimes it is enough to listen to one's children when they talk about their faith, to respond to their questions regarding faith, to sing religious songs together or to interpret everyday events. It is crucial that family catechesis encompasses the needs of children, youth and adults, and that it is not about forcing religious practice. Due to their educational helplessness, parents often compel their children to undertake actions that they think are of great religious meaning. However, forcing a child to pray or participate in the Mass is often counterproductive. That is why wise parents will encourage, invite or accompany their children on their path of faith, rather than violate their freedom.

### 2.4. A Model of the path of beauty in the family

For many contemporary people, music, visual arts and creativity in virtual reality are a significant mode of expressing themselves. Since they intensely experience themselves, as well as everyday situations, they want to externalize these 'sensations'.[15] Having entered the sphere of beauty, man gives voice to his wonder, admiration and rapture.[16] Faced with the beauty of art, man may admire not only the creator of a given work of art, but gradually come to know, ontologically speaking, the First Creator. Contemplation of the beauty of art may lead

[15] Cf. W. Kawecki, *Teologia piękna. Poszukiwanie locus theologicus w kulturze współczesnej*, Poznań 2013.

[16] Cf. *Education and Creativity*, ed. E. Osewska, Warszawa 2014.

one from rapture to the experience of a religious, mystical character.[17] Pictorial and musical forms in art refer to the human being's ability to see and hear. A religious experience originates in listening to the word (which may reach us in everyday life), as well as in seeing the works of Jesus Christ. For it is through His incarnation that God became audible and visible. One may even assume that in Jesus Christ there is the 'internal interchangeability' of the word and image, which is confirmed by the Christological titles: *Logos*—the Word—and *Eikon*—the Image. That is why family catechesis should include both verbal as well as visual processes, especially since the contemporary young generation extensively makes use of imagination and iconic language.[18] If people search for a specific aesthetic of religion which will be consistent with their perception of beauty, then it makes sense to suggest that they may create a relationship with God while discovering beauty. Making family members more sensitive to the beauty of nature and art leads them to experience deep emotions, moves them and awakens a longing for beauty and infinity.

### 2.5. A Model of family solidarity

The awareness of socio-cultural, economic and religious conditions/circumstances prompts the family to take actions not only for the sake of itself, but for other people as well. The process of accepting Christian faith starts by acknowledging its authenticity and integrity.[19] In this model, active engagement of a family in a specific socio-cultural situation proves the maturity of its faith. This includes

[17] Cf. J. Królikowski, *Zobaczyć wiarę. Obraz i doświadczenie wiary w Kościele*, in: *Wierzyć i widzieć*, eds. K. Flander, D. Jaszewska, W. Kawecki, B. Klocek di Biasio, E. Mazur, N. Mojżyn, J.S. Wojciechowski, M. Wrześniak, D. Żukowska-Gardzińska, Sandomierz 2013, pp. 127–129; J. Królikowski, *Nieme słowo. Teologia w sztuce*, Tarnów 2008; J. Królikowski, *Widzialne słowo. Teologia w sztuce*, Tarnów 2009; W. Kawecki, *Czym jest locus theologicus kultury wizualnej?*, in: *Wierzyć i widzieć*, pp. 31–45; W. Kawecki, *Teologia wobec kultury wizualnej*, in: *Miejsca teologiczne w kulturze wizualnej*, Kraków—Warszawa 2013, pp. 15–29.

[18] Cf. J. Królikowski, *Widzialne słowo. Teologia w sztuce*, Tarnów 2009; W. Kawecki, *Teologia wobec kultury wizualnej*, in: *Miejsca teologiczne w kulturze wizualnej*, Kraków—Warszawa 2013, pp. 15–29; *Kultura wizualna—teologia wizualna*, eds. W. Kawecki, J.S. Wojciechowski, D. Żukowska-Gardzińska, Warszawa 2011; J. Stala, *Punina postojanja osobe—civilizacija ljubavi u kontekstu postmoderne*, „Crkva u svijetu" (2015) nr 3, pp. 469–477.

[19] Cf. E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, pp. 226–229; J. Stala, *Die Polen angesichts der Umbrüche im politischen und gesellschaftlichen Bereich. Ein Vierteljahrhundert nach der Unabhängigkeit Polens*, „The Person and the Challenges" 5 (2015) nr 1, pp. 191–199; J. Stala, *Katechese im Zeitalter der Postmoderne.*

concern for the natural environment together with human ecology, charity work for the sake of the poor, and helping the sick. In this model, the image of a Christian is transformed: he/she is wise, mature, is engaged in his/her professional life as well as in the social, political and Church life. This model also reveals the value of a happy Christian family as a community of love, life and growth, open to the needs of one's neighbour. Here, the process of religious socialization of children is connected with the image of religiosity in the adults: their parents, guardians, grandparents, educators and teachers. Therefore, a family catechesis which is sensitive to the needs of human being and to social changes, overcomes egocentrism and shows mutual social dependence, consequently building the foundation of mature faith. It is worth revealing the daily experience of families living ordinary lives and showing support to every member in a family, from the youngest to the oldest.

Faith cannot be devoid of solidarity with people,[20] (whoever they are and wherever they live) suffering desolation, exploitation, enslavement and/or living in inhumane conditions. Reflection and appropriate actions taken in the spirit of the Gospel are inseparable from the formation of faith in adults. The profession of faith entails one's readiness to take responsibility for today's society. This commitment is considered indispensable for the growth of a reliable Christian identity in contemporary society. Of course, it will differ according to the circumstances: whether we deal with children, youth or adults. Shaping sensitivity to the needs of other people and the capability of responding to it requires that parents/guardians are endowed with Christian openness, insight, and the ability to describe, analyse and assess a given social situation. It is the appropriate diagnosis of reality that helps the person to take the right steps. In certain situations, it is the attentiveness of the younger generation to the needs of the other that encourages initiatives from adults, and prompts them to answer the question: what does it mean to be a Christian today?

*„Grundsatzprogramm für die Katechese der Kirche in Polen" aus dem Jahr 2010*, „Bogoslovni vestnik" 74 (2014) nr 1, pp. 107–117.

[20] Cf. E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, pp. 235–255.

### 2.6. The ecclesial model

The ecclesial model is dedicated to families engaged in the parish community. Family catechesis thrives thanks to the family and the Church: on the one hand it is immersed in everyday life, nourishing and strengthening it; on the other, it participates in the life of the Church, fulfilling prophetic, priestly and pastoral (being of service) functions. As a domestic church, the family proclaims the Gospel and accepts it with faith, thus fortifying all its members. In taking up its priestly function, the family takes part in the liturgy of the Church, prayer and sacramental life, as well as offers God the toil of daily life. The Christian family is also called to perform the royal function, the constant 'service' in love towards God and neighbours. The full development of the ecclesial model of family catechesis requires the cooperation of parents, catechists, priests and leaders of religious groups in order to buttress the family and complement its prophetic, priestly and ministerial function. The Church expresses her responsibility for family catechesis through adequate ways of strengthening the family. Thus, formation in the family and parish plays a significant role. This is important as the future of religion in its social dimension is related to the family entering the ecclesial community, accepting the truths of faith and the patterns of behaviour on the level of interpersonal relations.[21]

### 2.7. A Model of the new evangelization of the family

In a situation in which the secularization of society is growing[22] (including that of the family), it is essential that we focus upon evangelization[23] (in the spirit of the primary proclamation of the Gospel) in order to convert the human person or nourish their faith. Thus, the first aim of this kind of catechesis would be to organize an appropriate time for evangelization activities. For example, the engaged or the married couple should be evangelized in the first place, so that they may understand the essence of the communion they wish to establish, or in which they already live. The so-called pre-marital courses are not sufficient, especially if they are run in an average way. The contemporary family needs

[21] J. Mariański, *Religijność społeczeństwa polskiego w perspektywie europejskiej. Próba syntezy socjologicznej*, Kraków 2004, p. 418.

[22] Cf. E. Osewska, *Rodzina i szkoła w Polsce wobec współczesnych wyzwań wychowawczych*, Kraków 2020, pp. 67–85.

[23] Franciszek, *Adhortacja apostolska o głoszeniu Ewangelii we współczesnym świecie Evangelii Gaudium*, 24 XI 2013, Kraków 2013.

an evangelization that will lead to a change of mind and heart, and later to full conversion. The family should be able to receive a formative path from parish catechesis and other pastoral forms: a path from which it will draw sustenance in its specific situation and with manifold needs (of living, educational and cultural character) connected with its Christian growth.

In the postmodern era, when so many parents shift the responsibility for the catechesis of their kids to the school and parish, it is crucial that they are prepared to take responsibility for the education in the faith. If they abdicate this duty, it is often because they are hardly aware of their educational role, and their bond with the local Church and with God has weakened. That is why some parents think that if they are not witnesses to faith, they may exert a negative influence on their children if they start providing them with a religious education. However, it seems that as long as parents remain mindful of the needs of their offspring, there is always a chance for catechesis in the family, even if their faith is far from the ideal that may be expected of adults. What counts is the event that may prompt adults to re-discover the meaning of faith: sometimes it is a serious illness or the death of a loved one, encountering a person who bears witness to faith, or the sacramental initiation of their children which 'give food for thought.' Preparing children for the sacraments of Penance, Reconciliation and the First Holy Communion motivates parents to verify their own faith. Moreover, children express their doubts, ask questions, and together with parents search for answers to questions regarding faith. Therefore, family catechesis is not only about the impact of adults on children, but the other way round as well. The sacramental initiation of children is an opportunity for parents to meet and recall the kerygma. It is crucial that these meetings with parents do not boil down to discussing organizational issues, but include basic questions regarding the meaning of faith in everyday life. Family catechesis cannot be limited to proclaiming the Gospel theoretically, but must including the spreading of the Good News in the context of the real problems of people. For it is the Gospel that is the solution to these problems, as it contains the unchanging truth about man and family. God never leaves families stranded, but comes to their aid.

### 2.8. A Model of formation of the family with the help of religious movements

Families involved in various religious movements may be formed in the spirit of the objectives and charism of a given association. Otherwise, they may refer to the experience of certain members of the family associated with a given

religious movement. Here, methods of catechesis applied by parents are of less importance as they reflect the originality of a particular family.

Parents who are members of religious groups or movements should carefully choose methods that are in line with the age and abilities of their family members. For example, methods that have proved useful when applied to children should not be transferred to teenagers who are often rebellious. Methods of catechesis should be altered according to the needs and expectations of a given age group.

Religious movements adopt various presumptions, and yet they are all focused on deepening faith,[24] a process which is associated with internal motivation and with answering the question: Why do I believe? Faith is not only something one is born into, an element of one's cultural background, but above all, it is a consequence of one's conscious decision to follow Jesus Christ. Catechesis in the family connected to a religious movement is an echo, a reflection and an image of this act of following Jesus. As such, it should be a continual confirmation of this clinging to Jesus Christ, rather than mere communication of information. It is especially important now when religion has been pushed to the private sphere and is no longer reflected in the public. The family, as the community of persons caring for one another and for their integrity, should also be concerned with the growth of their faith, a process assisted by religious groups or communities. When family members are able to express their conviction that faith is valuable, then their inner motivation to live their daily life in accordance with the principles of the Gospel is strengthened. Here, family members do not perceive catechesis as something external and imposed on them. Rather, they treat it as a natural consequence of a Christian life in which every day brings new opportunities to meet Jesus Christ who calls man to seek the truth about oneself and discover the meaning of one's life. Family catechesis may find assistance in grandparents or older siblings who are engaged in religious groups. Their witness may inspire or encourage others, especially the youngest family members. In this context it is also worth utilising religious groups for children and youth that will fortify the foundations of faith in the family.

[24] Cf. A. Potocki, *Wychowanie religijne w polskich przemianach. Studium socjologiczno-pastoralne*, Warszawa 2007, pp. 363–480.

### 2.9. A Model of family catechesis in a religious dialogue

In the present socio-cultural context, the Christian family keeps in touch with families of various religious and cultural backgrounds. Therefore, a Christian should get to know other religions so that she/he may enter more easily into a dialogue required by the Christian kerygma. The kerygma and dialogue, each in their scope/capacity, are integral parts and authentic forms of one and the same mission of the Church, and their aim is to share the saving truth.

In order to maintain a fruitful dialogue with families of different religions, the Christian family needs to learn more about the kerygma, the Holy Scripture, and the tradition and teaching of the Church, so that it may consciously present Christianity not only with words, but also with the witness of daily life in the spirit of the Gospel. Showing respect to families that represent other religions should lead us to an in-depth search for the truth of Christianity and to discover the originality conveyed in following Jesus Christ. A family catechesis that is engaged in religious dialogue should be especially concerned about the consistency of its 'message' with the revealed truth and in putting Jesus Christ first.

### 2.10. A Model of family catechesis that combines faith with culture

A human being who believes in God cannot shun culture and escape into a spirituality which is misunderstood. He/she needs to enter into a dialogue with culture, searching for 'tangent points'. The Gospel should permeate culture and transform it. Each family has its cultural background. Moreover, it introduces the younger generation into culture. And yet it is never isolated from a broader culture which shapes the spirituality, morality, social and even economic situation of the family. This is accompanied by opportunities as well as risks. Promotion of the so-called mass culture, which undermines the educational authority of parents, and relativizes values and principles of Christian life, is particularly disturbing.[25] Therefore, we must emphasize significant elements of the spiritual culture of the family which, to a great extent, determine the implementation of family catechesis. These elements include: the word, sensitivity to symbolism, habits and rituals of a given family and hierarchy of values.[26] The Word passed on in the family has a particular value, as it reaches members of the family

[25] Cf. *Dyrektorium katechetyczne Kościoła katolickiego w Polsce*, Kraków 2001, nr 7.

[26] Cf. J. Wilk, *Pedagogika rodziny. Zagadnienia wybrane*, Lublin 2016, pp. 67–79.

in everyday situations and helps them meet God in their lives. Simple, domestic experience should be complemented with the word 'thanks' to which it acquires a religious meaning. 'Faith comes by hearing', that is why words uttered by parents and other significant persons become the word of prophecy as well as the interpretation of events.[27] Unfortunately, the situation of contemporary families reveals the crisis of the word. The fast pace of life curbs time and the content of verbal communication in the family. For that reason, it is worth rebuilding the custom of 'exchanging words' in the family through telling family stories, reading the Bible together, and holding conversations about everyday events. The function of proclaiming the Word is fulfilled not only by adults (including grandparents), but by children as well.

The family is still an environment where the language of faith can be shaped in a way that is clear and understandable, within a given cultural context. In the past, family catechesis was unduly focused on passing on the doctrine in theological jargon, which resulted in repeating catechism rules without understanding their meaning and implications Few parents had an opportunity to learn how to pass on faith. However, when devoid of this skill, one contends not only with the use of adequate language but also with education. Some of these difficulties spring from a mutual misunderstanding. It is therefore advisable to devote time and energy towards a common effort to create a language with theological content which would be transparent to all the members of the family, in order that the verbal communication of faith is confirmed in daily life.

When the family is open to culture, its members become sensitive to the presence of signs and symbols at home, especially those of a religious character: the table, bread, water, light. These signs point to the reality that surpasses the human descriptive capacity and enables the encounter with God.[28] A family which is capable of awakening the sensitivity of children and adults to the realm of signs and strengthens their ability to admire and delight, not only reveals the religious meaning of a symbol, but leads them to encounter God in the sacraments.

It is also important for the family to create its own rituals which refer to its tradition, uniqueness and bond with God. Even simple family habits, such as praying before and after a meal, blessing children, or preparing holiday

[27] J. Wilk, *Pedagogika rodziny. Zagadnienia wybrane*, Lublin 2016, pp. 68–69.

[28] Cf. J. Stala, E. Osewska, *Fundamentalne podstawy i obszary katechezy rodzinnej*, Tarnów 2000, pp. 96–97.

decorations together, contribute to the spiritual culture of the family and encourages other families to follow suit. Supporting cultural life in the family also includes going to the theatre, cinema, museum, exhibitions and concerts.[29]

The family tries to transmit a specific hierarchy of values to future generations, which is especially significant in the present society dominated by pluralism of norms and values. Thus, a family with an aptly internalized and clear hierarchy of Christian values exceeds contemporary ethical codes. It passes on evangelistic ideals such as: overcoming evil in human, loving every person including enemies, striving for holiness and building a community of faith, hope and love.[30] Today, family catechesis faces many challenges, including the transformation of religiosity and educational relationships. Religiosity is changing its form, becoming changeable, private, individualized and oriented towards a religious experience[31]. Educational relationships are also undergoing changes. Traditionally, parents provided input which was interpreted only as 'top-down'; they were responsible for religious formation of the younger generation. Now, the parent-child relationship is weakening, whereas bonds between peers, as well as the external influence on children and youth (especially through information and communication technologies), are flourishing. The young share their experience and inspirations thanks to countless websites, blogs and social networks. The ties between an adult and a child begin to fade, whereas bonds between a child and her/his peers take root.

## 3. Conclusion

The successful implementation of family catechesis has never been easy. It seems that in the postmodern era it is even more difficult: it requires great responsibility, wisdom and integrity of parents who receive less and less support from the modern society and culture. The rapid development of information and communication technologies and the increasing pace of life contribute to chaos and confusion of parents. Can we still hope that the family supported by the Church

[29] Cf. J. Wilk, *Pedagogika rodziny. Zagadnienia wybrane*, Lublin 2016, pp. 73–76.

[30] Cf. W. Piwowarski, *Funkcje rytuału religijnego*, in: *Rytuał religijny w rodzinie*, eds. W. Piwowarski, W. Zdaniewicz, Warszawa—Poznań 1988, pp. 82–84.

[31] Cf. E. Alberich, *Katecheza dzisiaj. Podręcznik katechetyki fundamentalnej*, Warszawa 2003.

and specific organizations will create the environment that assists its members in their quest for religious and personal integrity?

Surely, in the present situation of religious transformation, it is necessary to restore to the family the task entrusted to it by the Creator and confirmed by the Church. While searching for adequate models of family catechesis, it is worth remembering that they should engage all members of the family and respond to their needs. If the family hardly stays in touch with the Church, one may start with the catechesis supporting the family or catechesis in the spirit of evangelization, so that the family becomes thoroughly permeated by the Gospel.

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# The Family in the Scientific Achievements of Professor Helena Radlińska. References to the Sources of Polish Social Pedagogy

## Abstract

The aim of this article is to present the issues of the family in relation to the scientific achievements of Prof. Helena Radlińska. In the course of the research, the descriptive research method was used. This was accompanied by a cross-sectional analysis of the documents. The subject of the conducted research were family issues, considered from the point of view of social pedagogy. The subject of the research was the family and people creating the family life environment. The summary of the analysis are the directions of further research, the effects of which will facilitate the creation of theoretical foundations for models of assistance, care, support and family development.

## Keywords

Helena Radlińska, social pedagogy, family, parenthood, family studies

## 1. Introduction

The family, along with its everyday life matters, is a part of the scientific interest of Polish social pedagogy. Issues related to the family, its existence, functioning, goals, functions, tasks, norms, values, internal relations and ties or relationships with the wider world, were within the field of theoretical, research and practical activity of Prof. Helena Radlińska and her associates (including students and PhD students). It can be unequivocally stated that the family has been the subject of cognition and scientific consideration of social pedagogy from the early days of this science in Poland. This was emphasized by H. Radlińska herself in her first socio-pedagogical speech, which marks the disciplinary beginning of Polish social pedagogy. Participating in the discourse during the session of the Cracow Circle of the Association of Higher School Teachers (April 25, 1908), she delivered a paper entitled "On the issues of social pedagogy."[1] In the course of the argument, she presented the issues of the Polish national school, with which she connected, among other things, the issues of parenthood and the family life environment of children—students.[2] Subsequent works by this author confirm the presence of the family in the field of socio-pedagogical interest.[3]

Undertaking an analysis of the scientific work of Prof. H. Radlińska, parts of which she devoted to family issues, it is necessary to emphasize that the family as a subject and the issues of family life as an object of interest, were included in all sections of social pedagogy. These sections (departments) defined the following areas of theoretical, research, teaching (didactic) and practical activity: the field of theory of social service, the field of adult education, the field of historical research on social and educational activity.[4] Issues of social service theory referred, among others, to issues related to family assistance, maternity protection, out-of-school educational and care support, social security (including housing) or equalizing opportunities for children from families experiencing

[1] H. Radlińska, *Z zagadnień pedagogiki społecznej*, „Muzeum", II, 2 (1908), pp. 52–63.

[2] H. Radlińska, *Z zagadnień pedagogiki społecznej*, pp. 61–62.

[3] H. Radlińska, *Pedagogika społeczna*, Wrocław 1961, Ossolineum; H. Radlińska, *Zagadnienia bibliotekarstwa i czytelnictwa*, Wrocław 1961, Ossolineum; H. Radlińska, *Z dziejów pracy społecznej i oświatowej*, Wrocław 1964, Ossolineum; H. Radlińska, *Oświata i kultura wsi polskiej. Wybór pism*, Warszawa 1979, Ludowa Spółdzielnia Wydawnicza.

[4] H. Radlińska, *Egzamin z pedagogiki społecznej*, in: H. Radlińska, *Pedagogika społeczna*, Wrocław 1961, Ossolineum, pp. 361–362.

poverty, orphanhood, etc.[5] The issues of adult education included, among others, the formation of parental competence, raising awareness of the responsibility of adult family members (parents, grandparents) for the development of children and youth (adolescents), as well as the inclusive function of the school towards students' parents.[6] Historical issues related to education and social service were conducive to the analysis of past social processes (including individual human biographies), the knowledge and understanding of which made it easier to find directions for action in the present and future. In particular, it was about searching for factors of change that would serve the theory and practice of supporting human development, including family development.[7]

In each section (of the departments) of social pedagogy, Prof. H. Radlińska together with her associates (scientists and practitioners), placed family issues in various social, cultural, historical, economic, etc. references. The multidimensionality of family life implied a plural approach to matters considered in the course of analyses, research or discourse conducted during conferences, conventions and other forms of dialogue combining the theoretical perspective with the practice of daily family service.[8] Helena Radlińska took an active part in organizational and substantive works devoted to the exchange of thoughts, ideas, professional experiences and the presentation of research results covering various spheres of human life, including family life. They served to explore selected fragments of reality and to generate effective solutions for the practice of cultural, educational or social service (including family service).[9]

Longitudinal and transverse (cross-sectional) analysis of the scientific achievements of Prof. H. Radlińska allow us to state unequivocally that the family was, for this scholar, one of the most important subject groups included

[5] H. Radlińska, *Egzamin z pedagogiki społecznej*, pp. 379–381.

[6] H. Radlińska, *Podstawy planowania opieki nad dziećmi i pomocy młodzieży*, in: H. Radlińska, *Pedagogika społeczna*, Wrocław 1961, Ossolineum, pp. 345–346; H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, Warszawa 1935, Nasza Księgarnia SP. AKC, p. 60; H. Radlińska, *Szkoła w walce z ujemnymi skutkami wojny w dziedzinie moralności* (dokończenie), „Praca Szkolna" 9–10 (1946–47), pp. 372–373.

[7] H. Radlińska, *Egzamin z pedagogiki społecznej*, pp. 390–394.

[8] H. Radlińska, *Rodzina i świat społeczny*, „Polska Oświata Pozaszkolna" 6 (1932), pp. 445–449; H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, pp. 59–60.

[9] H. Radlińska, *Zadania pracy kulturalnej*, „Kultura Polski" 1 (1917), pp. 1–5; H. Radlińska, *Zagadnienia oświaty pozaszkolnej*, „Oświata Pozaszkolna" 2 (1923), pp. 113–121; H. Radlińska, *Istota i zakres służby społecznej*, Warszawa 1928, Dział Wydawnictw Związku Spożywców R.P.

in the field of socio-pedagogical interest. It is worth adding that it was a comprehensive interest, starting from the period of preparing young people for family roles (parental, marital, custodial, caring, etc.), to adult education and compensation. Education was focused on raising family awareness (consciousness), releasing responsibility for upbringing and supporting children's development, as well as understanding the differences in experiences, goals, aspirations and perspectives of everyday life of individual age generations living in one historical generation.[10] Compensatory activity served to minimize the negative effects of deficits occurring in the family. Holism and the integrity of grasping the issues of family life determined the coherence of the socio-pedagogical approach to the family, as presented by Helena Radlińska.

## 2. Family: scientific cognition for family service

Polish social pedagogy was, and remains, a practical science. It was emphasized by Prof. H. Radlińska on the occasion of the characteristics of this science.[11] Theoretical, research or teaching (didactic) activity in this area is focused upon building methodical models for successful educational, cultural and social practice, including family work. As emphasized many times by H. Radlińska, the family is the most important social unit (cell). The family plays a key role in collective life, because "the natural and moral forces unite in the family."[12] This statement referred to the conclusions of the Second International Conference of Social Service, devoted to family issues, in relation to social and economic matters. It was held in Frankfurt am Main (Germany) on July 11–14, 1932.[13] Radlińska participated in the deliberations of the sixth committee of the conference, the leading theme of which were the issues of education and its impact on family life.

[10] H. Radlińska, *Rodzina i świat społeczny*, pp. 447–448.

[11] H. Radlińska, *Egzamin z pedagogiki społecznej*, pp. 360–361.

[12] H. Radlińska, *Rodzina i świat społeczny*, p. 446.

[13] Polski Komitet Drugiej Międzynarodowej Konferencji Pracy Społecznej, *Sprawozdanie z Drugiej Międzynarodowej Konferencji Służby Społecznej*, Warszawa 1933, Drukarnia Państwowa, p. 50, http://bc.gbpizs.gov.pl/dlibra/publication/699/edition/675?language=pl Sprawozdanie z Drugiej Międzynarodowej Konferencji Służby Społecznej we Frankfurcie nad Menem 1932 r. — Główna Biblioteka Pracy i Zabezpieczenia Społecznego<br /> ul. Zabraniecka 8L (I piętro)<br /> 03-872 Warszawa<br /> (gbpizs.gov.pl) (25.08.2023).

The conference sessions were attended by doctors, nurses, social workers, teachers, counselors, caregivers, educators and scientists (researchers) in a total of 1,200 participants representing 35 countries in Europe, America and Australia.[14] The aim of the conference was to outline the current facts of the family and to look for ways to improve and develop in the future.[15] In the delivered paper, entitled "Issues of education in the service of family culture"[16], Prof. H. Radlińska emphasized the need to re-evaluate the inherited values, which in contemporary times (1932) have lost their former meaning. It was related to the changes in living conditions in which children and youth found themselves in the third decade of the 20th century. At the same time, she emphasized the importance of active participation of children and youth in social life. In the light of both law and social policy, the youngest citizens of the world have gained the ability to engage forces in social processes, which, according to the speaker, should take place with the participation of all fully-fledged subjects.[17] In order to implement the legal status in everyday life, adult education addressed to parents and grandparents is necessary. In particular, it is about developing a culture of family life, in order that adults would understand family roles and be able to support children in their development. At the same time, it is important to raise awareness, both legal and substantive, in the field of natural generational differences occurring in family life environments.

The Frankfurt conference was entirely devoted to family issues and family service. Helena Radlińska's participation was not limited to one section only. She was the secretary of the Polish Committee of the Second International Conference on Social Work and participated in the preparatory work for this event. Thanks to this, she had a full picture of the conclusions emerging from the dialogue undertaken. In a lecture given on the Polish Radio on October 25, 1932, she expressed this by summing up her speech with postulates arising from the field of theory for the practice of family service: "To maintain, heal, and develop the institution of the family—proclaimed the closing of the Conference, it is necessary not only a minimum of material resources, but also a certain

[14] Polski Komitet Drugiej Międzynarodowej Konferencji Pracy Społecznej, *Sprawozdanie z Drugiej Międzynarodowej Konferencji Służby Społecznej*, p. 47.

[15] H. Radlińska, *Rodzina i świat społeczny*, p. 447.

[16] H. Radlińska, *L'Education populaire au service de la culture familiale*, „Le Service Social" 1–2 (1933), pp. 1–5.

[17] H. Radlińska, *L'Education populaire au service de la culture familiale*, pp. 2–3.

amount of cultural goods. Lowering the standard of cultural life, reducing the productivity (efficiency) of public welfare institutions, threatening culture, also threatens the family."[18]

## 3. Family: children and adolescents (youth)

Family issues, considered from the perspective of children and youth (adolescents), were taken up by Prof. Radlińska in relation to school, upbringing, care, assistance, hygiene (health) issues, as well as preparation for the performance of family roles (parenthood, marriage, nurturing and child caring, etc.). In the field of analysis and research covering the spheres of family life, there were problems in this regard: a) school records[19], b) school and students' educational achievements[20], c) popularizing access to education and educational support for children and youth[21], and d) the implementation of young people for family responsibility through the formation of parental, child-rearing competencies, etc.[22]

In Helena Radlińska's scientific activity, the citizenship of children and youth (adolescents) was inextricably linked to the issues of family life. According to this researcher, the most important upbringing processes take place in the family. They are aimed at supporting the development of young family members and preparing them for adulthood. Undertaking educational, cultural, social, health (hygienic), preventive, etc. issues, H. Radlińska referred to the space of family life. Educational, cultural, social, health and other activists emanated from families. They constituted specific subject groups centered around educational, cultural and social etc. activities. Looking at family relationships in a longitudinal perspective, this author emphasized the need to understand the separateness (distinctiveness) of individual generations co-creating a family in its historical generation.[23] In particular, it regarded three active age classes

[18] H. Radlińska, *Rodzina i świat społeczny*, p. 449.

[19] H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, pp. 95–114.

[20] H. Radlińska, *Podstawy walki z drugorocznością*, „Praca Szkolna" 4 (1932), pp. 97–103.

[21] H. Radlińska, *Rodzina i świat społeczny*, p. 447.

[22] H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, p. 60; H. Radlińska, *Rodzina i świat społeczny*, p. 446.

[23] H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, pp. 59–60.

creating the space of family life: seniors (grandparents), adults (fathers) and young people (grandchildren).[24] The key was to support the development of children and youth in an atmosphere of freedom and respect for the individuality of human existence. This is because (in the light of the research results cited by Prof. H. Radlińska), it conditioned the success of family coexistence, as well as the bond and trust of children to their fathers.[25]

The ideas of cooperation, mutual understanding of subjective separateness, as well as respect for the diversity of generations of age families (resulting from different life experiences and conditions in which they grew into family reality, and more broadly—social reality), were the key axes around which prof. H. Radlińska focused on research issues. This is confirmed by the scientific achievements of this scientist, in which she referred directly to the family and issues related to family life. It is worth emphasizing on this occasion that the longitudinal and transverse analysis (cross-analysis) of Helena Radlińska's texts validates the theorem about the interpenetration of family issues in relation to all important issues raised by her from the point of view of social pedagogy.[26] Therefore, subjective universalism can be indicated, which in the family is fully reflected in the research and theorizing activity in the socio-pedagogical field. Such an approach implies the optics of perceiving social and family matters in full symbiosis, which referred to children and youth as well as adults and seniors.

## 4. Family: adult and seniors

The socio-pedagogical optics of viewing the family as a subject of scientific cognition and, at the same time, the practice of social support, covered all age groups co-creating the space of family life in Helena Radlińska's work. In addition to children and young people, adolescents, adults (parents, foster families, professional carers) and seniors (grandparents, great-grandparents) were perceived by this author as recipients of specific types of influence. It included

[24] H. Radlińska, *Rodzina i świat społeczny*, p. 448.

[25] H. Radlińska, *Rodzina i świat społeczny*, pp. 447–448; H. Radlińska, *L'Education populaire au service de la culture familiale*, pp. 2–4.

[26] H. Radlińska, *Egzamin z pedagogiki społecznej*, pp. 361–362.

in particular: a) educational work (adult education)[27], b) cultural work (provision and dissemination of cultural goods and cultural activation)[28], and c) social work (compensation, care, assistance, counselling, social support).[29]

Adult education, included in the field of social pedagogy, was addressed, among others, to family members representing the generations of parents and grandparents. The family orientation of this activity included not only knowledge regarding the phenomena and processes conditioning family relationships or situations of families in everyday life. It also concerned the development of relevant (appropriate) skills related to performing family roles, as well as awareness of the responsibility of adults and seniors for the success of family coexistence with their offspring.[30]

In addition to adult education, an important issue taken up in the workshop of Prof. H. Radlińska's scientific work, were issues related to cultural and social work. The results of the research and theories generated on this basis were used to create methodical models for practice aimed, among others, at supporting family life environments. They covered two main fields of socio-pedagogical activity. On the one hand, it was about developing the potential of strength (human forces), through active participation and creativity focused around culture. This concerned in particular the sharing and dissemination of cultural goods and the awakening of the need to participate in the co-creation of works that conditioned the spiritual, aesthetic, ethical or moral sphere of human existence.[31] On the other hand, it came down to compensating for the various deficits that exist in families. This type of activity was related to rescue, care, assistance, counseling and other forms of service to improve the financial situation of families. The necessity of these actions resulted from crisis situations and deprivations (shortages) caused by poverty, unemployment, loss of health,

[27] H. Radlińska, *L'Education populaire au service de la culture familiale*, pp. 3–4; H. Radlińska, *Rodzina i świat społeczny*, p. 448.

[28] H. Radlińska, *Podstawy planowania opieki nad dziećmi i pomocy młodzieży*, p. 345; H. Radlińska, *L'Education populaire au service de la culture familiale*, pp. 1–4; H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, p.60; H. Radlińska, *Rodzina i świat społeczny*, pp. 447–448.

[29] H. Radlińska, *Stosunek wychowawcy do środowiska społecznego*, p. 60; H. Radlińska, *Egzamin z pedagogiki społecznej*, p. 380; H. Radlińska, *Podstawy planowania opieki nad dziećmi i pomocy młodzieży*, pp. 346–350; H. Radlińska, *Rodzina i świat społeczny*, pp. 447–449.

[30] H. Radlińska, *Rodzina i świat społeczny*, pp. 448–449.

[31] H. Radlińska, *L'Education populaire au service de la culture familiale*, pp. 2–5.

housing problems, etc.[32] Phenomena of this type implied the weakening of family ties, and in extreme situations led to family breakdown, single motherhood, and abortion, about which H. Radlińska wrote explicitly in 1946–1947: "It is necessary to prevent the termination of pregnancy, which ruins the physical and mental health of many women. In this area, it is important to influence fathers (who are often forced to take this desperate step)."[33]

Of utmost importance in this author's consideration of family issues, was the question of the integrity of strengthening activities, which required references to the material and immaterial spheres in equal measure. She expressed this by pointing out that "The effectiveness of assistance almost always depends on the joint (combined) satisfaction of material and spiritual needs."[34] It can be assumed with full conviction that in the 21st century, the recalled view of prof. Helena Radlińska is still valid—is still up to date.

## 5. Conclusions: inspirations from the past for the science and practice of family service in the 21st century

The summary of the analytical approach to the scientific achievements of Helena Radlińska devoted to the family, opens the way to in-depth studies in the future. In the conclusion of the analysis, it is possible to indicate the directions of further cognitive activity inspired by the past. Adopting the assumption of consistency between theory and practice, it is worth emphasizing that the effects of exploring family life issues can serve to build theoretical foundations for methodical implementation proposals in the field of family service. In a dichotomous approach, it is associated with activities for the development of the family, as well as compensation for deficits resulting from various dysfunctions.

Contemporary reception of the scientific works of Prof. H. Radlińska makes it easier to outline further directions of scientific exploration that can be undertaken in the field of socio-pedagogical and family-centered research. The open catalogue of issues that are possible and worth taking up includes, first of all, methodological issues, which are fundamental for exploring detailed

[32] H. Radlińska, *Podstawy planowania opieki nad dziećmi i pomocy młodzieży*, pp. 345–351; H. Radlińska, *Rodzina i świat społeczny*, pp. 446–447.

[33] H. Radlińska, *Podstawy planowania opieki nad dziećmi i pomocy młodzieży*, p. 349.

[34] H. Radlińska, *Rodzina i świat społeczny*, p. 446.

fragments of the reality of family life. The family as a subject of scientific interest may include the issues of family narrative, biographical research, cognition and understanding the sphere of family relations, ties, functions, goals, tasks, as well as ethical foundations that bind families as a special type of social group. Matters related to parenthood, marriage, childhood or activities, supporting the everyday functioning of family life environments are also equally important and require scientific cognition. Each of the indicated directions requires a separate analysis and presentation, which may be a signpost for further family-science discourse and the subject of detailed scientific analyzes and presentations in the future.

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# The carnal dimension of love of Catholic spouses

## Abstract

According to the Encyclical Humanae vitae of Pope Paul VI, conjugal love should be human (sensual and spiritual), full, faithful and exclusive, and fruitful. Human sexuality has a purpose and meaning. In addition to the procreative meaning, it also contains a bonding element, openness to the needs of the other, love, care, interest. However, to be complete, it requires communication, also in terms of intimate needs. Their proper satisfaction, with the appropriate level of maturity and religious activity, is the basis for marital fidelity. A proper understanding of the essence of sexuality allows the development of openness to life and the selection of appropriate methods of family planning, consistent with moral standards. For Christians, religious principles are the basis for understanding human nature, also in the sexual dimension, at the same time being the basis for formulating and understanding adequate norms derived from natural law. Respecting the principles of Catholic moral ethics puts marriage and family life in order. The aim of the considerations is to present human sexuality as an expression of conjugal love, which should be human, full, faithful, exclusive and fertile. In order to consider the normative significance of religion in the sex life of Catholic couples, a critical analysis of various sources was conducted. This included examining Church documents, books, and articles in scientific journals. The method applied in this paper involved a critical analysis of selected texts and a synthesis of their content. The basis for the considerations will be the Encyclical Humanae vitae of Pope Paul VI supplemented with modern knowledge in the field of biology, psychology, sexology and theology of marriage and family.

## Keywords

marriage, sexuality, religion, norms, Humanae vitae

## 1. Introduction

In the Christian tradition, the sacredness of marriage is based on the belief in its divine origin. Marriage as a sign of the action of Christ, who unites a man and a woman in an indissoluble covenant of love and life, strengthens and consecrates them for the fulfilment of their conjugal and parental duties so that they may glorify God and attain holiness and salvation. Pope Paul VI's Encyclical *Humanae vitae*[1] states that conjugal love should incorporate human elements such as sensuality, spirituality, whilst remaining complete, exclusive, faithful, and fruitful. Human sexuality, in this context, serves a purpose and holds meaning. Besides its procreative function, it promotes bonding and fosters openness to the needs of others, thus facilitating the expression of love, care, and interest.

Today, the breakdown of the traditional marriage relationship, the sexual revolution in the broadest sense of the word[2], the biologisation of love, negating its spiritual dimension, the attack on the Church, often seen as a bastion of outdated views and conservatism, may bewilder many, specifically young individuals in the process of developing their world view. In fact, it is the attainment of an appropriate level of maturity and religious commitment, together with a correct understanding of the nature of sexuality that is crucial for building a foundation of marital fidelity, openness to life and the choice of family planning methods in accordance with moral standards. For Christians, religious principles indeed provide a basis for understanding human nature, including its sexual dimension. They also aid in establishing and comprehending appropriate standards based on natural law. This is further reinforced by adherence to Catholic moral ethics, which grants structure to the life and family of the married couple, endowing it with a sense of understanding, significance, and meaning.

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[1] Paweł VI, Encyklika *Humanae vitae*, Kraków 2003, (further: HV) no. 9.

[2] Rev. Andrzej Zwoliński seeks the causes of numerous pathologies related to the way love and sexuality are experienced in the sexual revolution. He mentions the influence of Wilhelm Reich's „moral liberation" (the pursuit of sexual satisfaction as an antidote to all ills); Sigmund Freud's thoughts, which suggested that the sexual drive was analogous to the need to eat; Abraham Maslow's theory, which elevated hedonism to an existential goal; Alfred Kinsey's report, which presented a new view of sexuality. Due to their emergence during a period of burgeoning sexual liberalism and presentation as scientific work, they have had a major impact on shaping public opinion in this area. A. Zwoliński, *Grzechy główne*, Kraków 2019, Homo Dei, p. 85–86.

Meanwhile, for many centuries, issues pertaining to gender and sexuality were viewed as taboo, even within the teachings of the Church. However, the Second Vatican Council prompted a shift in this mindset. Several Church documents emerged during this time that offered a Christian perspective on human sexuality. These documents include *Gaudium et spes*[3], *Humanae Vitae*[4], *Persona humana*[5], numerous statements by John Paul II (including *Male And Female He Created Them*[6] and *Letter to Families "Gratissimam sane"*[7]), as well as *Familiaris consortio*[8] and *Evangelium vitae.*[9] The importance of proper education in the area of human sexuality and love (*Gravissimum educationis*[10], *Educational Guidelines on Human Love*, *Human Sexuality, The Truth and Meaning of Human Sexuality*[11], and *the Catechism of the Catholic Church*[12]) and the importance of moral education (Encyclical *Veritatis Splendor*[13]) were also stressed.

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[3] Paweł VI. (7 XII 1965), *Gaudium et Spes. Constitutio Pastoralis de Ecclesia In Mundo humus Temporis*. Sacrosanctum Concilium Oecumenicum Vaticanum II "Acta Apostolicae Sedis" (1966) 58, pp. 1025–1120. Available online: https://www.vatican.va/archive/aas/documents/AAS-58-1966-ocr.pdf (accessed on 28 March 2024).

[4] HV.

[5] Deklaracja o niektórych zagadnieniach etyki seksualnej *Persona Humana.* (29 XII 1975). Święta Kongregacja Nauki Wiary, „Acta Apostolicae Sedis" (1976) 68, p. 77–96.

[6] Jan Paweł II, *Mężczyzną i niewiastą stworzył ich*, Lublin 1998, wyd. Katolicki Uniwersytet Lubelski.

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[12] Catechism of the Catholic Church. 2003. Available online: https://www.vatican.va/archive/ENG0015/_INDEX.HTM (23.03.2024).

[13] Jan Paweł II (6 VIII 1993), Encyklika *Veritatis splendor,* "Acta Apostolicae Sedis" (1993) 85, pp. 1133–1228.

## 2. The Human Dimension of Love

According to the teachings of the Church, conjugal love is deemed „*fully human.*"[14] Its fullness and authenticity can only be achieved when it encompasses both physical and spiritual dimensions. Karol Wojtyła conducted a psychological analysis of human love and identified three levels. The fullness of this love, he believed, can only be attained when the levels are integrated appropriately. The first level, known as the sensual level, is typically established through sexual desire (and occasionally spiritual values). Indeed, sensual experiences and feelings accompany many male and female relationships. They can lead to admiration of the partner and appreciation of his or her broadly understood "beauty". However, when pure sensuality takes precedence, the partner may be objectified and seen as a mere "consumable" commodity. In this regard, sensuality, an integral aspect of conjugal love, may be easily distorted, particularly among men. This is due to their innate reflexive and spontaneous sensory responses. While these naturally occurring reflexes are not inherently immoral, misusing them as objects of pleasure can subsequently lead to feelings of remorse as the individual should never be treated as an object. A further dimension involves sensuality expressed through tenderness, the desire for closeness, exclusivity and intimacy, including the sexual dimension. However, despite initially appearing to be devoid of desire, particularly in women, when affection becomes focused solely on the sexual aspect of femininity and masculinity, it may lead to objectification of the other individual if it is not integrated with the affirmation of the person. Proper integration and maturation of sensuality is expressed through one's responsibility for oneself, one's spouse, and one's offspring. It is important to note that sensual desire and emotional involvement are highly subjective and dependent on the person concerned, and it is only by integrating them with the objective truth of human dignity that the value of the "complete" human being can be recognised and affirmed leading to the final spiritual level of human love. And only by recognising the complete personal worth of the other, true human love can be experienced.[15] According to Karol Wojtyła, spousal love is the most perfect and the fullest type of love as it affirms the complete individual and is a mutual gift of oneself which is offered infinitely and also requires spiritual

[14] HV, no. 9.

[15] Cf. K. Wojtyła, *Osoba a miłość*, Lublin 1986, Dajmonion, pp. 49–72, 79–83.

exertion. What is noteworthy is that this type of love can only attain its fullest expression in conjugal love (or in consecrated life).[16]

Human conjugal love is therefore all-encompassing, embracing both the sensual (bodily) and spiritual dimensions. These two dimensions are also intertwined in Pope Francis' exhortation *Amoris Laetitia*, which points out that the spiritual and sensual spheres cannot be isolated from each other, as this would contradict the essence of marriage. Complete love for the spouse involves both his or her spiritual sphere and body.[17] Indeed, love that unites the bodies and souls of the spouses, based on a high degree of understanding and respect, is not solely the result of instinctive impulses; it is not merely a primitive drive or emotion, but it is an act of the will "that is meant not only to survive the joys and sorrows of daily life, but also to grow, so that husband and wife become in a way one heart and one soul" and they achieve their human perfection.[18]

Bogdan Wojciszke's contemporary psychological theory of love, which includes intimacy, passion, and commitment, aligns with this framework.[19] Intimacy is characterised by warmth, closeness, connection, bonding and a genuine concern for the other person's well-being. It involves feeling happy in hisory her presence, showing respect, building trust, achieving mutual understanding, sharing experiences and both spiritual and material goods. Intimacy also encompasses the giving and receiving of emotional support, exchanging intimate information and considering the partner as an important part of one's life. Passion entails the experience of intense emotions, both positive and negative ones such as fascination, delight, excitement, desire, tenderness, and joy, as well as suffering, anxiety, fear, longing, and jealousy. It is characterized by a strong motivation to connect with the object of love and may involve physical closeness and sexual contact. Passion is frequently misinterpreted as love, particularly by young people, despite being distinct from it. While sexual desires are an essential component, it also blends in other needs like self-esteem or a sense

[16] Wojtyła differentiated between love as a predilection, rooted in emotional and psychological factors, love as desire with a significant element of sensuality, and love as kindness, akin to love-based friendship rooted in shared values (K. Wojtyła, *Miłość i odpowiedzialność*, Lublin 1986, wyd. Katolicki Uniwersytet Lubelski, p. 8.

[17] Cf. R. Pomarańska, *Analiza porównawcza cech miłości małżeńskiej na podstawie Familiaris Consortio i Amoris Laetitia*, „Studia Warmińskie" (2022) 59, pp. 363–369.

[18] Cf. HV, no. 9.

[19] Cf. B. Wojciszke, *Psychologia miłości. Intymność, namiętność, zobowiązanie*. Gdańsk 2013, Gdańskie Wydawnictwo Psychologiczne, pp. 7–13.

of belonging. Commitment involves all the actions, decisions, thoughts and feelings targeted at both the welfare of the other person and the conversion of love into a long-lasting relationship. It stems from free will, a conscious decision, and a yearning for that other person to remain part of one's lives forever. Even during periods of marital hardship or waning affection, it enables spouses to remain dedicated to one another.[20] In this context, the ideal state is unconditional, perfect love, the aspiration of every marriage, particularly at its start, comprising all three elements of love (albeit their intensity varying over time) and signifying profound, mature marital relations. Its creation requires time and the desire to be together through thick and thin, until death.[21]

## 3. The Fullness of Love

Conjugal love is sometimes defined as a special form of friendship wherein spouses generously share everything with each other while keeping selfishness and injustice at bay. True love is altruistic, shunning selfish actions. Spouses in love disregard fair shares, contracts or service exchanges. They complement each other, try to do their best, enjoy the opportunity to bring joy and enrich each other. It is an expression of true love, giving of oneself, following the example of how Christ gave himself for us.[22] Conjugal love is also a unique form of gift that enriches the spouse and the acceptance of his or her gift; it is an act that fosters mutual growth.[23] In this regard, each act of close intimacy embodies a particular mode of communication in which total self-giving to the other person and, at the same time, the acceptance of his or her total gift of self are materialised. This gift, in the context of sacramental marriage, expresses the essence of the marriage vows.[24] To understand this, however, it is essential

[20] Cf. S.K. Ciccarelli, N.J. White, *Psychology*, New Jersey 2015, Pearson Education, p. 476.

[21] Cf. H. Fischer, *Why we love: The Nature and Chemistry of Romantic Love*, New York 2005, Henry Holt and Company, pp. 92–93.

[22] Cf R. Pomarańska, *Analiza porównawcza*…, p. 368.

[23] Cf. HV, no. 9.

[24] Marriage, as Elio Sgreccia emphasises, is an expression of complementarity that is also a sign of incompleteness. This lack of completeness necessitates complementation, including within the realm of giving, which results in necessary completeness (M. Machinek, *Przesłanie Humanae vitae z perspektywy pięćdziesiątej rocznicy ogłoszenia encykliki,* "Teologia i Moralność" (2018) 24, pp. 18–19.

to increase awareness of the role of love and the marital relationship. The Encyclical *Humanae Vitae* underscores their spiritual and theological importance, stressing that their true nature and dignity are revealed when it is realised that they are rooted in God, who is love and the Father of all fatherhood in heaven and on earth.[25] Only in the perspective of God—his Creator—can man be fully understood.

Conjugal love, therefore, as a renunciation of selfishness, is directed towards the good of the other and thus constitutes the foundation of the spiritual and typically human dimension of the conjugal and family relationship.[26] Indeed, marriage is a sacred bond based on the commitment to care for the good of one's spouse in both the temporal and spiritual spheres. It follows that each spouse has a moral obligation to adapt to the needs of the other.[27] True love is the act of directing one's will towards the well-being of the beloved person, sacrificing oneself for his or her well-being, respecting his or her desires, and supporting his or her development and drawing closer to God. Its antithesis is selfishness, hedonism or the treatment of the other person as a means to attain one's own objectives. Therefore, in order to build profound, long-lasting and meaningful relationships, the fullness of love, including its spiritual dimension, is an indispensable element. For "whoever really loves his partner loves not only for what he receives, but loves that partner for the partner's own sake, content to be able to enrich the other with the gift of himself."[28]

It is important to note that the openness to intimacy, including the sexual dimension, is directly linked to the gift. Remarkably, this is not as straightforward as it might seem. Most people, regardless of age, deem sexual abilities or skills to be innate. However, for these abilities to benefit one's partner, they require an understanding of his or her specifics (differences), needs and desires, openness, forbearance, altruism and the time needed to tune in together. It is worth emphasizing that the most suitable time for this attunement is during the "honeymoon phase" when spouses, who are deeply in love and eager to be intimate with one another, are as receptive as possible to being a gift to one

[25] Cf. K. Wojtyła, *Nauka encykliki Humanae vitae o miłości*, „Analecta Cracoviensia" (1969) 1, p. 343.

[26] Cf. G. Grzybek, P. Tobiczyk, *Religijne i kulturowe uwarunkowania seksualności a wychowanie do rozwoju osobowości etycznej*, „Ars Inter Culturas" (2017) 6, p. 90.

[27] Cf. O. A.M. Czaja, *Znaczenie miłości małżeńskiej w aspekcie kanoniczno-pastoralnym*, „Prawo Kanoniczne" (2018) 61, no. 2, p. 100.

[28] HV 9.

another.[29] The physical closeness between partners brings pleasure and releases oxytocin, which can positively affect the stability and longevity of their relationship. It is essential to remember that a woman can fully embrace her sexuality when her husband exhibits a mature demeanour. This entails demonstrating tenderness, selflessness, fostering open communication, engaging in day-to-day activities, expressing concern for their children and showing interest in the maternal role of his wife. Such traits enable him to become a "selfless gift of self", which involves the transmission of life.[30] For every sexual act, potential fertility is inextricably linked as procreation is inscribed in the very essence of sexual behaviour.[31] It is appropriate to affirm that every sexual act possesses both spousal (gift of self) and parental (procreative) significance, and, thus, it cannot be solely reduced to a mere pleasure-seeking experience or an essential component for the conception of a child.

A truly mature approach for Christian spouses is to remain receptive to the possibility of new life during every intimate encounter, and to embrace it fully, even in cases of unplanned conception.[32] This outlook reduces frustration and anxiety during intercourse, given that neither natural nor artificial family planning methods provide a 100% guarantee of effectiveness. In this regard, it is important to note that the moral value of the sexual act as a complete act of self-giving remains unaffected by whether it takes place during fertile or infertile periods.[33] By establishing a cyclical pattern of fertility and infertility in human couples, God has granted the liberty to make prudent decisions concerning the number of offspring or frequency of births.[34] The recognition of shared fertility is one of the essential factors in maintaining the marital bond, which requires

[29] In mature relationships, including sexual ones, the level of selfishness decreases while the ability to coordinate one's own needs and those of the partner increases, M. Komorowska-Pudło, *Psychospołeczne uwarunkowania postaw młodzieży wobec seksualnośc*, Szczecin 2020, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, pp. 34–35.

[30] Cf. E. Lichtenberg-Kokoszka, *Seks w konfesjonale. Bo nic co ludzkie nie jest nam obce*, Kraków 2023, Impuls, p. 204.

[31] Cf. R. Buttiglione, *Znaczenie aktów seksualnych w obrębie języka ciała*, „Zeszyty Formacji Duchowej" (2005) 28, Duchowość i seksualność, p. 45.

[32] Cf K. Krajewski, *Moralne zło antykoncepcji*., in: *Dar ciała darem osoby. O przemilczanym wymiarze kryzysu więzi małżeńskiej* (ed.), Piotr Ślężyczka, Lublin 2005, wyd. Towarzystwo Naukowe KUL, pp. 31–36.

[33] Cf. R. Buttiglione, *Znaczenie aktów seksualnych*…, p. 42.

[34] See HV, no. 10, 16.

an effort on the part of both partners. Both spouses should learn to recognise the cyclical female fertility, to control their impulsive tendencies and passions, and to respect the biological laws inherent in gender. In addition, full acceptance of one's spouse requires acceptance of her fertility. Eliminating it (through contraceptive methods) challenges the fundamental principle of valuing it as an undesirable element that should be discarded. It should be acknowledged at this point that many men, especially those who are immature, impulsive or driven purely by sexual desire, want to have a sexual intercourse at any time. In such circumstances, support for contraception is widespread, but its impact includes the objectification of women (reducing them to objects of sexual gratification), their increasing disengagement from procreation (through fear of unwanted pregnancy), and negative emotional effects on relationships. The extent to which women are open to contraception may make it difficult for men to mature, take responsibility for their own sexual activity, fatherhood and fidelity.

## 4. Fidelity and Exclusivity

The marriage vow of conjugal love made in the presence of God entails a conscious commitment to direct one's affections solely towards his or her spouse and to maintain this commitment until death. According to *the Catechism of the Catholic Church*, marriage requires unity, which means that the marital relationship is monogamous and concluded between a man and a woman.[35] Additionally, marriage requires indissolubility, which stems from the nature of human love striving for exclusivity. This is because the human psychic space is constricted and can only accommodate a few people, deep psychic contact, understanding and closeness can only be established in a couple. Human beings also have a deep inner need to make this one and only relationship more meaningful, to be special to the other person and for the other person to be special to that person. This is because love, including sexual love, cannot be shared between different people without losing its value.[36] What is more, individuals in a traditional relationship generally experience greater enjoyment and emotional fulfilment from sexual encounters (although, it must be noted that demonstrating marital

[35] Cf. G. Grzybek, P. Tobiczyk, *Religijne i kulturowe uwarunkowania seksualności…*, p. 90.

[36] Cf. W.K. Kilpatrick, *Psychological Seduction*, Nashville, Tennessee 1997, Thomas Nelson Publishers, p. 249.

maturity characterised by an openness to their partner's sexual desires plays a vital role in this regard). This is in contrast to individuals engaging in more casual sexual encounters.[37] "Open marriage" and polygamy do not prevent infidelity, and these types of relationships can involve various emotions, including commitment, attachment, love, jealousy, anxiety, and suffering. These are not simply the wife's benevolent reaction to the man's undisclosed sexual desires and fantasies. Many women experience psychological and moral discomfort due to their husband's infidelity given that the arousal caused by a sexual intercourse with another individual is short-lived and necessitates constant, progressively elaborate stimulation.[38]

Occasionally one may hear that marital fidelity (especially from the male perspective) is not possible.[39] Meanwhile, most extramarital sexual relationships are due to problems in the relationship rather than to sexual needs per se. When the desires and needs of the spouse are met correctly by the partner, in an atmosphere of mutual openness, kindness and acceptance, with proper communication and a successful sex life, the need to seek satisfaction outside the marriage becomes unnecessary. Therefore, it is the quality of the relationship built by the spouses which influences their level of fidelity or infidelity. Spouses who experience fulfilment within their relationship and satisfaction with their sexual life typically exhibit no interest in pursuing emotional and sexual relationships beyond the confines of marriage.[40]

To achieve complete union and happiness, it is essential for both parties to demonstrate fidelity, exclusivity, honesty and marital chastity. Love is manifested in a deep concern for the wellbeing and dignity of the spouse, unwavering

[37] Cf. J. Bancroft, *Human sexuality and its problems*, Edinburg, London, New York, Oxford, Philadelphia, St Louis, Sydney, Toronto 2019, Elsevier, p. 220.

[38] Cf. G. Masterton, *Magia seksu*, Poznań 2013, Rebis, pp. 200–201.

[39] Such a view reduces men to beings who cannot control their own sex drive. However, a lack of such control is indicative of psychosexual immaturity (and seldom a specific type of libido), rather than a typical male characteristic (although males tend to have greater sexual reactivity than females, and managing it can take significant time, particularly during puberty). Z. Lew-Starowicz, *Kluczowe pojęcia: seks i erotyzm, miłość i związek*, in: *Jak się kochać? Edukacja seksualna dla każdego*, (eds.), A. Długołęcka, Z. Lew-Starowicz, Warszawa 2010, Świat Książki, pp. 12–15; B. Trzeciak, *Życie intymne. Wybrane zagadnienia z seksuologii*, Kołobrzeg 2012, Wydawnictwo REDA Kazimierz Ratajczyk, p. 19.

[40] Cf. Ch. Northrup, P. Schwartz, J. Witte, *The normal bar. The surprising secrets of happy couples and what they reveal ab aut creatung a New normal In your relationship*, New York 2021, Harmony, p. 241.

loyalty in all circumstances, and adherence to the commandments of God. Religiousness, piety and morality are important factors in the relationship with God and people.[41] Indeed, a spiritual bond based on mutual devotion and nurturing affection allows for the stabilisation of relationships and a sense of security for all members of the marriage and family.[42]

## 5. Fertility

Conjugal love is always fruitful love that is focused on future generations. It extends beyond procreation and encompasses a creative, imaginative life, which is expressed in marriage by supporting the development of the spouse and the offspring, creating an atmosphere conducive to growth, attachment, self-esteem and self-dignity. Fruitful love extends beyond the community of the spouses, seeking to include others. Fertility is not merely an external element artificially added to conjugal love, but expresses its proper essence.[43] Fertility, inscribed in the plan of human creation, is a sign of God's blessing, which was articulated at the very dawn of human existence ("Be fruitful and multiply"; Genesis 1:28). The transmission of life and the creation of a wider family community is an expression of the appropriate cooperation between spouses and God's fruitful love.[44] The Christian faith posits that God Himself creates an immortal soul in the body transmitted by the parents. Hence, parents become God's co-labourers in creation and the offspring conceived by them is primarily God's gift and child. Since it is not possible to determine with certainty the number of children to be born into a family and the time at which they will be born, responsible parenthood means being open to this divine gift. If spouses remain closed off to God's sovereign will in the transmission of human life and nature, by solely focusing on their own plans and choices, then the cultivation of responsible parenthood and its openness to life will never fully mature. As collaborators with

[41] Cf. U. Dudziak, *Religiousness of spouses as a factor contributing to shaping a successful marriage*, "Teologia i Moralność" (2022) 1 (31), p. 140.

[42] Cf. A. Drożdż, *Miłość i odpowiedzialność—wyznaczniki kanonicznego przygotowania do małżeństwa. Dynamiczne fieri osoby—moralne zakorzenienie miłości i odpowiedzialności małżeńskiej*, Katowice 2013, Wydawnictwo Uniwersytetu Śląskiego, pp. 49–50.

[43] HV, no. 9.

[44] Cf. A. Pryba, *Naturalne planowanie rodziny wewnętrznym aspektem odpowiedzialnego rodzicielstwa*, „Verbum Vitae" (2022) 40(1), p. 178.

the Creator, Christian parents who are receptive to God's will should honour the life they transmit, regardless of how it was conceived and even if it deviates from their intended plans.

Marriage, therefore, is inherently oriented towards procreation and the rearing of offspring, for this is its fulfilment and culmination. True conjugal love is characterized by openness to life. The unjustified, selfish rejection of the possibility of having offspring not only opposes God's plan, but also diminishes the very essence of love.[45] Offspring complete a family[46] and, as an exceedingly valuable gift to marriage, bring the greatest good to their parents, being the source of the strongest bonds.[47] The essence of marriage and conjugal love, according to the Second Vatican Council, is directed towards procreation and the process of raising children, which is viewed as their highest value and purpose.[48] In this regard, the key purpose of marriage and family is to serve life.

Deciding to marry, therefore, entails entering a new and deeper dimension of one's humanity expressed through fatherhood and motherhood. Sexuality, on the one hand, gives pleasure and a deep sense of togetherness, union and mutual belonging; on the other hand, it gives birth to life. Therefore, the conjugal act, being the full gift of the self and the acceptance of the gift of the other, is most fully expressed in the acceptance of the common destiny of being parents.In this context, conjugal sex life serves not only as a means of expressing spousal but also parental affection, becoming a site for the transmission of life.[49] For this reason, it should only occur between individuals who possess the capacity to responsibly welcome, protect, and lovingly guide this new life through its development. Contemporary scientific research in the fields of anthropology, psychology, pedagogy, sociology and theology indicates that the optimal setting for happy parenting and responsible upbringing of children is within a mature, enduring marital relationship. This assertion finds further validation in natural law. Within Catholic moral theology, it pertains to the essential ethical truths

[45] However, if a couple cannot conceive children due to infertility, their married life does not diminish in its worth, W. Polak-Jakuszko, *Christian marriage and love*, "Łódzkie Studia Teologiczne" (2017) 1(26), p. 40.

[46] Cf. Francis, *Amoris Laetitia*, no. 14.

[47] Cf. *Gaudium et Spes*, no. 50.

[48] Cf. *Gaudium et Spes*, no. 48.

[49] Cf. T.H. van de Velde, *Małżeństwo doskonałe. Jak stworzyć związek idealny. Fizjologia i psychologia płci*, Warszawa 2013, Czarna Owca, p. 39.

that arise from human nature. These truths serve as the foundation for establishing standards of conduct related to sexual behaviour. Religious principles, combined with natural law, make up the underlying basis for comprehending human sexuality in an ethical manner. This shapes standards such as disallowing contraception use, whilst concurrently stimulating responsible parenting and acknowledging the value of life from its very beginning. Catholic doctrine asserts that the fundamental aims of marriage include procreation, unity, and love between the spouses and the use of contraception is considered incompatible with these objectives.[50]

## Conclusions

"Marriage, then, is far from being the effect of chance or the result of the blind evolution of natural forces. It is in reality the wise and provident institution of God the Creator, whose purpose was to effect in man His loving design."[51] In this context, the laws that come from God and regulate marriage require theological and moral commentary, because they are not merely the invention of human will. Human beings are unique as they are created in the image and likeness of God, unlike any other earthly beings. Those who deny their inherent (including sexual) nature and the sanctity of marriage are committing a sin against God and themselves, as he is their Creator.[52] The erotic dimension of love is neither an evil nor a burden to be tolerated, but a gift from God that beautifies the most profound, the intimate encounter of spouses, the realisation of pure, exclusive affirmation. The appropriate use of sexuality reveals the greatness of the human heart, bestowing happiness and inspiring the other person to live to the fullest.[53]

[50] This is particularly the case as many of them (e.g. hormonal contraceptives or intrauterine device) also have an early abortifacient effect, E. Lichtenberg-Kokoszka, *Seks w konfesjonale…*, pp. 211–220.

[51] HV, no. 8.

[52] Cf. E. Varden, *The shattering of loneliness: On Christian Remembrance*, New York 2018, Bloomsbury Continuum, p. 135.

[53] Cf. Franciszek, *Amoris Laetitia*, pp. 152–156.

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# Radio Free Europe's Polish Broadcasting Service vis-à-vis the Millennium and Church—State Relations (1965–1966)*

## Abstract

This article presents an analysis of selected broadcasts by Radio Free Europe's Polish Broadcasting Service on the 1966 celebration of the Millennium of the Christianisation of Poland, against the background of the relationship between the Church and state. The source material consists of programmes available online on the Radio Liberty website and articles published in the monthly magazine *Na Antenie/On Air* from 1965 to 1966. The author's intention is to show the role and meaning of radio broadcasts vis-à-vis the Millennium Poloniae celebrations, which were of a religious and political nature. The radio station, under the direction of Jan Nowak-Jeziorański, defended the authority of Primate Stefan Wyszyński against communist propaganda, while serving as the only source of information for audiences in the country with respect to the Novena initiated in 1956, which culminated in the Millennium. Aside from RFE's political objectives, the broad-

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casts served to counter the propaganda and the campaign against the Church and to break the media monopoly in the People's Republic of Poland. Having a formative and integrative character, they also contributed to the preservation of the listeners' religious identity.

**Keywords**

Millennium of the Christianisation of Poland, Radio Free Europe, church-state 1965–1966

## 1. Introduction

"The Primate implemented the guidelines from the Polish Episcopate masterfully, so that the Millennium of Poland would be fundamentally religious," wrote Maria Winowska to Jan Nowak-Jeziorański.[1] This approach resulted in attacks on Primate Stefan Wyszyński himself, in fierce propaganda efforts by the communist regime against the celebrations, and in an anti-Church campaign in the press.[2] The Polish celebrations were held in a climate of fierce political confrontation and an "anti-millennium" campaign, conducted by the Communist government.[3]

In principle, the statements uttered on the Polish service of Radio Free Europe regarding the Millennium of Poland's Christianisation and the relationship between the Church and state, were well-balanced[4], even if the events were

[1] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, ZN im. Ossolińskich, Wrocław 2016, p. 146.

[2] A. Dudek, *Państwo i Kościół w Polsce*, Kraków 1975, pp. 181–211; M. Mazur, *Polityczne kampanie prasowe w okresie rządów Władysława Gomułki*, LTN, Lublin 2004, pp. 38–100; A. Adamski, *Tysiąc kłamstw na tysiąclecie. „Trybuna Ludu" o Kościele w latach 1965–1966*, „Biuletyn Edukacji Medialnej" 1 (2011), pp. 127–145; R. Knyspel-Kopeć, *„Nie my prosimy o wybaczenie". PZPR wobec jubileuszu milenijnego w akcji propagandowej przeciwko „Orędziu" biskupów polskich w świetle „Głosu Koszalińskiego"*, in: S. Ligarski, R. Łatka (eds.), *Oficjalna prasa w PRL*, IPN, Szczecin—Warsaw 2020, pp. 323–336.

[3] B. Noszczak, *Antymilenium. Konflikt państwa z Kościołem*, IPN, Warsaw 2020.

[4] RFE's mission in Poland, as elsewhere, was never to spark a revolution, but to "keep hope alive and maintain links with the West […] Its role […] would be to publicise, comment on and thus help expand the signs of genuine, newly emerging opposition". A. Johnson Ross, *Radio Wolna Europa i Radio Swoboda. Lata CIA i późniejsze*, Kolegium Europy Wschodniej im. J. Nowaka-Jeziorańskiego, Wrocław 2014, p. 260; "[…] The goals set by the Broadcasting Service can be divided into immediate and long-term. The former arose from the current

reported with clear support for the activities of the Church under the leadership of Cardinal Stefan Wyszyński. RFE played a major role in the period when the Polish Episcopate had no voice in the mass media. Nowak-Jeziorański wrote: "The concentrated fury of the anti-church campaign was aimed at the Primate, and by extension at bishops, especially those more rebellious. The cardinal was harassed not only by repeated assaults in the press, on the radio and television; we knew that he was flooded with anonymous letters, libellous, and all sorts of fake news was sent to priests, while the authorities had no scruples about openly slandering him."[5] Jeziorański candidly stated: "He never dreamt of playing a political role and showed no ambition to do so. […] The Primate's strong personality and his moral authority meant more than the special powers granted to him by the Pope."[6] Jeziorański was well aware that Wyszyński was "a guardian of the Church's unity" and "he had to be defended at all costs."[7]

Besides being perceptibly religious in nature, RFE broadcasts were also political, national and patriotic, following the Radio's agenda. They represented the effort on behalf of "*enslaved* societies to maintain their spiritual independence and national identity, to stand by their religion". RFE's mission was "to report objectively and fairly on important viewpoints that were not necessarily concordant with the official opinions uttered by the government".[8] RFE corrected errors, debunked whispered criticisms, conspiracies, schemes and reprimands, and rectified erroneous translations and misrepresentations. For instance, there was controversy surrounding the Bishops' *Pastoral Letter* of 1965 published in *Forum*, since the translation that was provided distorted its sense. Drawing attention to this misrepresentation, Stypułkowska referred to "the trick of omissions in the text."[9]

situation and boiled down to direct and indirect responses to domestic and international events, while the latter were connected to the strategic priorities of the United States, seeking to win the rivalry against the Soviet Union without resorting to military action". R. Habielski, P. Machcewicz, *Rozgłośnia Polska Radia Wolna Europa w latach 1950–1975,* vol. 1, Wyd. Ossolineum, Wrocław 2018, pp. 12–13.

[5] J. Nowak-Jeziorański, *Wojna w eterze*, Znak, Kraków 2006, pp. 435–436.

[6] J. Nowak-Jeziorański, *Wojna w eterze*, p. 436.

[7] J. Nowak-Jeziorański, *Strategia Prymasa*, „Na Antenie" 1 (1966), p. 1; J. Nowak-Jeziorański, *Wojna w eterze*, Znak, Kraków 2006, p. 437.

[8] R. Habielski, P. Machcewicz, *Rozgłośnia Polska Radia Wolna Europa w latach 1950–1975,* vol. 1, Wyd. Ossolineum, Wrocław 2018, p. 13, 270.

[9] A. Stypułkowska, *Jeszcze o orędziu biskupów*, „Na Antenie" 36 (1966), p. 6.

The celebrations of the *Sacrum Poloniae Millenium* attracted the attention of the whole political and religious world. Not only did the celebrations take place in Częstochowa, but also in Rome, Paris, London, Chicago, Montreal and other cities. The significance and prominence of the event was highlighted in broadcasts in various languages, and statements by well-known figures from the world of culture and science.[10]

Chaplain of the Radio Free Europe's Polish Broadcasting Service, Rev. Tadeusz Kirschke[11] stated, in a letter: "If there is a matter that frightens us, it is mainly the fact that the West German press reports most extensively on the religious celebrations of the Millennium in Poland, while the rest of the Western press has generally been silent about them, and it is awkward for us to constantly quote the German press."[12] Kirschke added that the Polish section of RFE was interested in "the tiniest details of the harassment carried out by the regime to discredit the millennium celebrations in different diocesan cities […] We are concerned even with petty, monkey-like mischiefs, which superficially and in isolation have no special significance, but in the summary we will one day make of the entire millennium year, they will constitute a serious issue heavily incriminating the regime."[13] He reported cases when journalists and foreign correspondents were threatened. Summoned to the press office of the Ministry of Foreign Affairs, they were "advised" to remain discreet in their "coverage of religious ceremonies", since "any careless information is harmful to Poland and may have unpleasant consequences for the authors."[14] Therefore, there was hardly any news on the Millennium Poloniae in the general press and Catholic newspapers. "The terrorised", as Winowska referred to them, "kept their mouths shut". At the same time, "folk piety" and the peregrination of Our Lady of Częstochowa were ridiculed in the state-run press.[15]

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[10] Examples include the speech by the US President on the millennial celebrations and Prof. Oskar Halecki's opening lecture at the inauguration of the Millennium Year in Rome.

[11] E. Kristanova, *The Religious Broadcasts of Rev. Tadeusz Kirschke for Radio Free Europe's Broadcasting Service*, in: *Politics and the Media in Poland from the 19th to the 21st Centuries. Selected Issues*, eds. by E. Kristanova, R. Habielski, M. Such-Pyrgiel, Brill, Leiden—Boston 2024, pp. 115–128.

[12] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, ZN im. Ossolińskich, Wrocław 2016, p. 158.

[13] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, p. 159.

[14] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, p. 159.

[15] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, pp. 161–162.

Radio Free Europe's Polish Broadcasting Service cared about the reliability of the coverage and verified any information that it received. The Catholic writer Maria Winowska, who collaborated with Jeziorański and Kirschke, "kept a close eye on the press and private echoes."[16] Both Polish and foreign newspapers were scrutinised, with particular focus on Catholic titles (including those published by the PAX Association).

## 2. Methodology

The choice of the research topic for this article is justified by the evident shortage of studies on the coverage of millennial celebrations by Radio Free Europe's Polish Broadcasting Service within the subject literature available.[17] The publications to-date, which present a variety of issues raised on air and representing the authors' varying perspectives, include source editions[18], studies[19], memoirs[20] and glossaries.[19]

[16] J. Nowak-Jeziorański, M. Winowska, *Korespondencja 1955–1989*, p. 188.

[17] A. Borzym, J. Sadowski (eds.), *Radio Wolna Europa w polityce polskiej i zachodniej*, SWS, Warsaw 2009; M. Wielopolska-Szymura, *Rozgłośnie BBC World Service, Radio France Internationale i Voice of America w kom; unikowaniu międzynarodowym. Od propagandy do dyplomacji publicznej*, Wyd. UŚ, Katowice 2019.

[18] R. Habielski, *Audycje historyczne i kulturalne Rozgłośni Polskiej Radia Wolna Europa w latach 1952–1975*, Wyd. Ossolineum, Wrocław 2019.

[19] L. Gawlikowski, P. Machcewicz, *„Monachijska menażeria". Walka z Radiem Wolna Europa 1950–1989*, IPN, Warszawa 2007; A. Puddington, *Rozgłośnie wolności. Triumf Radia Wolna Europa i Radia Swoboda w zimnej wojnie*, WN UMK, Toruń 2009; K.W. Tatarowski, *Literatura i pisarze w programie Rozgłośni Polskiej Radio Wolna Europa*, Universitas, Kraków 2005; Wejs-Milewska V., *Radio Wolna Europa na emigracyjnych szlakach pisarzy: Gustaw Herling-Grudziński, Tadeusz Nowakowski, Roman Palester, Czesław Straszewicz, Tymon Terlecki*, Arcana, Kraków 2007; V. Wejs-Milewska, *Wykluczeni—wychodźstwo, kraj. Studia z antropologii emigracji polskiej XX wieku (idee, osobowości, instytucje)*, Wyd. UwB, Białystok 2012; M. Wielopolska-Szymura, *Rozgłośnie BBC World Service, Radio France Internationale i Voice of America w komunikowaniu międzynarodowym. Od propagandy do dyplomacji publicznej*, Wyd. UŚ, Katowice 2019.

[20] A. Grabowska A. (ed.), *Wspomnienia pracowników Rozgłośni Radia Wolna Europa*, Rytm, Warsaw 2002; Z. Najder, RWE 1982–1987. *Zapiski dyrektora*, „Zeszyty Historyczne" 153 (2005), pp. 200–225; K. Zamorski, *Pod anteną Radia Wolna Europa*, Wers, Poznań 1995.

[19] L. Gawlikowski, *Pracownicy Radia Wolna Europa,* PAN, Warsaw 2015.

There are also smaller publications that focus upon less commonly discussed issues[20], for instance, an article describing the closure of Mieczysław Grydzewski's monthly supplement to the London-based *Wiadomości/News*, entitled *Na Antenie/On Air*. The supplement was published between 1963 and 1969 and reported on "the most important RFE broadcasts."[21]

The study includes programmes on the millennium celebrations between 1965 and 1966, which can be accessed online through the Radio's service. Unfortunately, the collection is incomplete and represents a selection of broadcasts by Radio Free Europe's Polish Broadcasting Service. The source material was researched by using the two keywords: "Millennium" and "Wyszyński". Selected episodes of the serial broadcasts *Archiwum PRL/Archives of the People's Republic of Poland* and *Kawalkada czasu/Cavalcade of Time* were also included.

Besides news broadcasts, the results also included a variety of other genres, such as commentaries, talks, reports, discussions, interviews, etc. While some were of good quality, others proved extremely difficult to listen to, due to static, extraneous noise and interference. Some were also duplicated under different captions. In addition, the analysis was hampered by numerous errors in the explanatory notes. Only after reviewing all the audio files from 1965–1966 available under the keywords mentioned, was it possible to gain a comprehensive overview of the subject matter.

As a supplement to the audio sources, press materials with respect to the celebrations, printed in the monthly *Na Antenie/On Air* between 1965 and 1966, were also included. The most useful research approach proved to be media content analysis (including press content analysis), and literature analysis and

[20] E.K. Czaczkowska, *Audycje Rozgłośni Polskiej Radia Wolna Europa o ks. Jerzym Popiełuszce od porwania do pogrzebu (19 X–3 XI 1984 roku)*, „Kultura, Media, Teologia" 46 (2021), pp. 96–115; K. Kamińska-Chełmniak, *Adam Ciołkosz i Radio Wolna Europa w świetle jego korespondencji z Janem Nowakiem-Jeziorańskim*, „Studia Medioznawcze" (2018), No 3, pp. 151–159; P. Machcewicz, *Operacja „Olcha". Władysław Bartoszewski, Radio Wolna Europa i Służba Bezpieczeństwa*, „Pamięć i Sprawiedliwość" 2 (2006), pp. 115–142; P. Szwacha, *Tematyka wsi i ruchu ludowego na antenie Rozgłośni Polskiej Radia Wolna Europa–zarys problematyki*, in: E. Jaska, P. Wiench (eds.), *Media o wsi. Media na wsi*, SGGW, Warsaw 2017, pp. 81–91; A. Trudzik, *Między Wspólnym Rynkiem a Wspólnotą Brytyjską — Wielka Brytania w „Kalejdoskopie" emitowanym na falach RWE (1960–1966)*, „Studia Europaea Gnesnensia" 1–2 (2010), pp. 95–117.

[21] R. Moczkodan, *„Na Antenie" i „Wiadomości": okoliczności rozpoczęcia i zakończenia współpracy*, „Archiwum Emigracji. Studia — Szkice — Dokumenty" ½ (2015), pp. 47–76.

literary criticism, which were employed to analyse the available and relevant literature, memoirs and letters.

RFE journalists presented the millennial subject in a religious and political context. One example of this was the coverage of Pope Paul VI's sermon delivered in Rome on the Millennium Poloniae, and the contrasting broadcast of the speech held in Poznań by Władysław Gomułka, First Secretary of the Central Committee of the Polish Workers' Party, to mark the millennium of the Polish state. While the Church celebrations were held in a solemn tone, the replayed (and sometimes read) speeches of party dignitaries featured distinct propaganda overtones. On the other hand, successive anniversary broadcasts recalling the year 1966 were of a more informal nature.

## 3. Chronological caesurae

Historians have expressed different opinions with regards to how long the preparations for the millennium celebrations lasted. Andrzej Paczkowski, in an episode of the series *The Most Recent History of Poland/Najnowsza historia Polski* (on the relationships between the Church and state), argued that the novena began in 1956 and lasted 10 years (*The Most Recent History of Poland/Najnowsza historia Polski*, 1995). Jan Żaryn nominated the text of *The Pledge of Jasna Góra/Śluby jasnogórskie* of 26 August 1956 as "the basis for the programme of the Great Novena, ending with the Millennium Year (1957–1966)."[22] The Primate initiated *The Pledge* in parishes across Poland on 5 May 1957, continuing annually in August at Jasna Góra for nine years. Each year the faithful renewed *The Pledge* on the first Sunday after the feast of 3 May. The novena was accompanied by a pastoral programme addressed to the entire Polish society.[23] In his sermon during the 1966 millennial celebrations in Rome, Paul VI also referred to the nine-year preparation by Poles for the occasion (*Speech of Pope Paul VI / Przemówienie papieża Pawła VI*, 1966).

The years 1965–1966 marked a difficult period in the relationship between the Church and state due to *The Pastoral Letter of the Polish Bishops to their German Brothers / Orędzie biskupów polskich do biskupów niemieckich* and the

[22] J. Żaryn, *Państwo—Kościół katolicki w Polsce 1956–1989. Wybrane zagadnienia*, Bellona, Warsaw 2010, p. 40.

[23] A. Micewski, *Kościół—Państwo 1945–1989*, WSziP, Warsaw 1994, p. 42.

Millennium of Christianity. This study considers these events as a separate chronological caesura. As reported by RFE in 1965, during the fourth session of the Second Vatican Council, Polish bishops took the opportunity to invite members of the episcopates from different countries to the millennium celebrations in Poland (*Przebaczamy i prosimy o przebaczenie/We forgive and ask for forgiveness*, 1990; Żaryn, 2004, 2010). In this way, the invitation gave the matter international prominence a year earlier. RFE noted that "the beginning of the millennium celebrations of the Poland's Christianisation coincided with a landmark event in the history of the Church—the end of the Second Vatican Council" (*Special Programme/Program specjalny*, 1991). As a result, on 13 November 1965, Pope Paul VI referred to the upcoming celebrations.

The communist authorities reacted to *The Pastoral Letter Orędzie biskupów* (one of 56 invitations sent) by launching a propaganda campaign.[24] Following the persecution of the Polish Episcopate, Primate Stefan Wyszyński was refused his passport and could not participate in the inauguration of the millennium celebrations held in Rome (*We forgive and ask for forgiveness/Przebaczamy i prosimy o przebaczenie*, 1990).

As the article reviews the events preceding the Millennium and the broadcasts on the subsequent anniversaries of the event, the chronology goes beyond the years 1965–1966.

## 4. RFE's Polish Broadcasting Service on millennium celebrations in Poland

Preparations for the millennium celebrations were preceded by a peregrination of a copy of the painting depicting Our Lady of Częstochowa. RFE reported that the painting was consecrated by Pius XII in May 1957 and began to travel around Poland in August (*Archiwum PRL / Archives of the People's Republic of Poland*). Between 1957 and 1965, it "travelled unrestrained" (*Przebaczamy i prosimy o przebaczenie / We Forgive and Ask For Forgiveness*, 1990). From the very beginning, the Great Novena was accompanied by a religious revival. There

[24] M. Mazur, *Polityczne kampanie prasowe w okresie rządów Władysława Gomułki*, LTN, Lublin 2004, p. 37; B. Noszczak, *Nobel za Orędzie? List o. Stanisława Wawryna SJ do prymasa Stefana Wyszyńskiego w sprawie możliwości przyznania Episkopatowi Polski Pokojowej Nagrody Nobla za wystosowanie Orędzia do biskupów niemieckich*, „Pamięć i Sprawiedliwość" 30 (2017), pp. 482–492.

were many local initiatives by priests and the lay faithful: masses, pilgrimages, meetings, marches and conferences.

The millennium celebrations were also announced during meetings that Wyszyński held abroad. RFE listeners learnt about a mass celebrated by Primate at Mariazell Basilica in Austria on 3 May 1964, and the medal of the Millennium of Poland's Christianisation presented to the youth there (*Holy Mass / Msza święta*, 1964). The celebrations were also heralded by the Archbishop of Wrocław, Bolesław Kominek, during an address to the Austrian Polish diaspora in Vienna on 12 June 1965 (*Przemówienie arcybiskupa Wrocławia Bolesława Kominka/ Speech by the Archbishop of Wrocław Bolesław Kominek*, 1973). In addition to this, it can be concluded that the enormous organisational effort of the Polish diaspora largely integrated pro-independence and Polish communities. All these events were meticulously reported by RFE.

Between 1957 and 1966, the main celebrations of the Christianisation of Poland were preceded by religious preparations including the peregrination of a copy of Our Lady of Częstochowa around the country. Until 1965, the communists did not interfere with the religious celebrations, but in 1966, they began to confiscate the copy of Our Lady of Częstochowa and move it from place to place. Following the campaign against bishops to punish them for *The Pastoral Letter/Orędzie biskupów*, "a war was declared against the holy painting" (*We Forgive and Ask For Forgiveness/Przebaczamy i prosimy o przebaczenie*, 1990). As Witold Pronobis and Grzegorz Sołtysiak reported on RFE, the Citizen's Militia would lay ambushes on the designated routes, seize the painting and desecrate it. Then, the copy would be given to a church other than planned. During yet another militia operation, the copy was taken to Jasna Góra, "under strict orders that it should stay there" (*Archives of the People's Republic of Poland / Archiwum PRL*). After this peculiar "arrest" of the painting, the tenacious faithful carried on with the peregrination of the empty frame until September 1966.

RFE reported that, facing the anti-Church campaign against the Episcopate for *The Pastoral Letter Orędzie biskupów*, on 19 December 1965, Wyszyński responded "for the first time to the slanders and lies" (*We Forgive and Ask For Forgiveness /Przebaczamy i prosimy o przebaczczenie*, 1990), deeming as unjustified, the allegation that the content of the letter had not been shown to the Communists. The Primate argued that, "It is not customary to publicise correspondence addressed to a specific person. We had no such obligation. Even if we wished to make it public, what would the censors do to it given it was their regular practice to make many amendments and deletions even in a regular

letter? Would the letter still be authentic then?" (*We Forgive and Ask For Forgiveness/Przebaczamy i prosimy o przebaczczenie*, 1990).

RFE's coverage of the millennial celebrations was based on the principle of contradiction. The religious celebrations were promoted, but it also broadcast an almost 40-minute anti-Church speech by Władysław Gomułka, that the First Secretary of the Polish Workers' Party delivered during a demonstration in Poznań, on the occasion of the millennium (*Władysław Gomułka's Speech at the Demonstration Przemówienie Władysława Gomułki wygłoszone na manifestacji; Excerpts from Different Programmes/Fragmenty różnych programów*, 1969; *Discussion of the Round Table/Dyskusja Okrągłego Stołu*, 1966; *Władysław Gomułka's Speech on the Millennium/Przemówienie Władysława Gomułki poświęcone Milenium*, 1966). As the state-run celebrations were intended to play down the role of the religious festivities, two days after the Gniezno celebrations of 14 April 1966, the Communists organised a festival of the People's Army of Poland (*We forgive and ask for forgiveness/Przebaczamy i prosimy o przebaczenie*, 1990). The contrasting coverage of events on RFE stemmed from the Radio's political nature and the desire to reach large audiences that necessitated messages to be comprehensible and easy to interpret. A detailed and balanced criticism of Gomułka's speech in Poznań was provided in an episode of *Kawalkada czasu / Cavalcade of Time*, at that time hosted by Paweł Zaremba, and featuring General Marian Kukiel, Tadeusz Piszczkowski, Jan Tokarski and Józef Żmigrodzki. Assessing the speech, it was admitted that Gomułka was well prepared as regards historical knowledge, but this knowledge served to launch a vicious attack on Primate Wyszyński and the Episcopate (*Władysław Gomułka's Speech on the Millenniu /Przemówienie Władysława Gomułki poświęcone Milenium*, 1966). Gomułka was reported to have exploited historical facts and traditions to praise the "socialist system" and the speech was compared to the "rasping of iron over glass" (*Kawalkada czasu/Cavalcade of Time* 1964–1974).

The tense relationships between the Church and state were confirmed in the coverage of the millennium celebrations on RFE (*Archives of the People's Republic of Poland/Archiwum PRL*). The inauguration took place on 14 April 1966 at Gniezno Cathedral, with a celebratory Mass held by Primate Wyszyński. Parts of the sermon and the chanting were replayed courtesy of two foreign participants who made private recordings (*Sacrum Poloniae Millenium: Jasna Góra Report/Sacrum Poloniae Millenium: Jasnogórski reportaż; Sacrum Poloniae Millenium. A Celebration Broadcast/Sacrum Poloniae Millenium. Audycja*

*z okazji*). RFE reported that the Communists went to great lengths to disrupt the inauguration by preparing a "great folk festival" to be held two days later so as to honour "the glorious anniversary of the crossing of the Oder and the Neisse by the People's Army of Poland". RFE sarcastically stated that, "The authors behind this provocation apparently sought, with dubious effect, to juxtapose the merits of the communist government for the new western border of Poland with the alleged plotting of the Polish Episcopate, which was dangerous for the permanence of this very border. The expression of the plotting was, obviously, the notorious letter from the Polish bishops to their German counterparts" (*Special Programme/Program specjalny*, 1991).

RFE noted that the day after the Gniezno festivities, an "alternative" state-run celebration was held, during which Gomułka attacked the Polish Episcopate in a speech broadcast on Polish radio and television. It gave him an opportunity to inform the nation that "the party has no intention of letting the Pope and foreign bishops enter Poland" (*Special Programme/Program specjalny*, 1991). According to RFE, Gomułka's justification went as follows: "In response to the fact that the Episcopate has embarked on a large-scale political campaign that is detrimental to the Polish raison d'état and intertwines with the preparations for the Millennium of Poland's Christianisation, the party has decided that it would be an expression of acceptance of this harmful policy if the government gave its consent to the arrival of the Pope and bishops from other countries" (*Władysław Gomułka's Speech at the Demonstration/Przemówienie Władysława Gomułki wygłoszone na manifestacji*, 1966). These statements reveal a strong discrepancyas to how the Millennium was perceived by the authorities and Church dignitaries. The campaign against the hierarchical Church and the propaganda in the national media confirmed there was a battle for the souls of the participants, and attempts to replace religious ceremonies with state ones.

The communists did not allow Pope Paul VI and Western bishops to join the main celebrations in Częstochowa on 3 May. In the *Behind the Scenes / Za kulisami* section of the April 1966 issue of *Na Antenie/On Air*, under the headline *Against the Millennium Pilgrimage/Przeciwko pielgrzymkom milenijnym*, there is a note about the government's decision to ban foreign pilgrims from attending the festivities, which was officially justified by organisational ("to avoid excessive crowding") or technical problems. Moreover, the issuing of individual visas at the Polish border by Orbis travel agencies and LOT airlines was suspended, while foreign journalists and correspondents were also barred from attending the celebrations (*Behind the Scenes/Za kulisami*, 1966, p. 8).

The celebrations of Poland's Sacred Millennium held at the Jasna Góra Monastery in Częstochowa on 3 May 1966 were presided over by Karol Wojtyła, who was still the Archbishop of Kraków, not the Pope. Thus, while he was not a major focus for Radio Free Europe's Polish Broadcasting Service, he was already recognised for his teachings and active participation in the Second Vatican Council. In March 1946, he wrote a mystical poem called *Pieśń o Bogu ukrytym* (*Song of the Hidden God*), a creative reference to St. John of the Cross. Two years later, Wojtyla completed his studies and received a doctorate for his dissertation entitled *Problem wiary u św. Jana od Krzyża* (*The Doctrine of Faith in St. John of the Cross*). In 1951, he took leave to complete his habilitation thesis, for which he conducted a systematic study of the ethical thought in the works of the phenomenologist Max Scheler. On 12 December 1953, Wojtyła's habilitation thesis called *Ocena możliwości oparcia etyki chrześcijańskiej na założeniach systemu Maksa Schelera* (*Re-evaluation of the Possibility of Founding a Catholic Ethic on the Ethical System of Max Scheler*) was unanimously accepted by the Faculty of Theology at the Jagiellonian University. However, the Polish Communist authorities abolished the Faculty, thereby preventing Wojtyła from receiving the degree, an incident reported by Radio Free Europe's Polish Broadcasting Service (*Fakty, wydarzenia, opinie*, 1978). Wojtyła's other works included teachings on Christian sexual ethics articulated in *Miłość i Odpowiedzialność* (*Love and Responsibility*), a 1960 book published in Lublin, and a number of philosophical essays, e.g., *Personalizm tomistyczny* (*Thomistic Personalism*) and *O humanizmie św. Jana od Krzyża* (*On the Humanism in St. John of the Cross*). Wojtyła was also recognised for his journalistic work as he wrote for the Kraków-based Catholic periodicals *Znak* and *Tygodnik Powszechny*[25].

RFE broadcast excerpts from the homily and blessing from the Primate, together with commentary (*Sacrum Poloniae Millenium. Welcoming the Primate of Poland/Sacrum Poloniae Millenium. Powitanie Prymasa Polski; Sacrum Poloniae Millenium: Jasnogórski reportage / Sacrum Poloniae Millenium: Jasnogórski reportaż*, 1967). They featured the enthusiastic cheers and applause of the faithful attending the events and the Primate expressing his gratitude for "the Mother and Queen's presence in the history of the Polish Church" (*Special Programme/ Program specjalny*, 1991). The May 1966 issue of *Na Antenie On Air* opens with a comprehensive article *A Thousand Years Ago/Tysiąc lat temu*, which poses the following question: "What was happening in other countries while Poland was

[25] Cf. G. Weigel, *Świadek nadziei*, Znak, Kraków 2012.

receiving Christianity?" (*A Thousand Years Ago/Tysiąc lat temu*, 1966, p. 1). The act of accepting Christianity and entering into Western culture was displayed against the background of events in Europe (in France, Germany, England, Scandinavia, etc.).

## 5. Conclusions

RFE's broadcasts were balanced despite their religious and political nature, with religious content juxtaposed with propaganda messages from the government The broadcasts strongly exposed and defended the authority of Stefan Wyszyński, as evidenced by the aired statements of Paul VI, who recognised the Primate as the spiritual leader of the nation. Wyszyński enjoyed not only the Pope's wholehearted support, but also the sympathy of the director of the RFE's Polish Broadcasting Service and its large audience. This support became evident to listeners when they were able to hear Polish translations of the papal speeches delivered at the millennium celebrations. Most of the goals listed in *The Policy and Operational Objectives for the Polish Millennium / Polityka i cele operacyjne na Tysiąclecie Polski* were accomplished.[26]

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[26] R. Habielski, P. Machcewicz, *Rozgłośnia Polska Radia Wolna Europa w latach 1950–1975,* vol. 1, Wyd. Ossolineum, Wrocław 2018, p. 390.

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# Reports, forum

*The Person and the Challenges*
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Zbigniew Kras
Chaplain of the President of the Republic of Poland

## Contemporary Pastoral Activities For the Sake of Humanity, And Peace. Report of the Chaplain of the President of the Republic of Poland

Due to the current situation of ongoing conflicts in various parts of the world, the issue of peace is present in many statements made by representatives of the Roman Catholic Church. While recognizing the dignity of the human being, they appeal to his/her deepest depths: heart or conscience. In this perspective, the heart/conscience reveals itself as the place where peace or war begins. The lack of peace in the world stems from internal disorder, chaos of values, failure to observe accepted norms, or arbitrary actions. There are many internationally recognized documents concerning the preservation or restoration of peace. Nonetheless, it is often forgotten that peace depends upon every individual, primarily on the transformation of their heart, on the acceptance of the principle of respecting human dignity and rights, freedom, and justice. Without this transformation, the implementation of peace will not occur, and even the most beautiful appeals and declarations will remain mere empty slogans. Therefore, it is worth pointing out even the smallest actions that can contribute to the transformation of a person and thus, to the acceptance of the right to peace for every individual. In this paper, the topic of peace will be presented in a brief report of events, which demonstrate that even seemingly insignificant actions can have a huge impact.

## To Pray For Peace Incessantly

On February 24, 2022, Russia attacked Ukraine. Political analysts had already predicted the outbreak of the war a few weeks earlier. The only questions were: When will it happen? Under what circumstances? This week or next, day or night? A few days earlier, on February 13, I woke up very early and, as I never do, I headed straight to the desk with the computer. It was my first inspiration in the morning to write a prayer, correcting hardly anything. It then became the prayer of many, of people seeking peace, of representatives of different nations, a prayer for every day, for a long time. It has become a prayer that must not cease. Usually, when I write such texts, it is for myself, but this time I decided to share it on Facebook. I did so three hours after writing it. And this triggered a chain of events that I could not have predicted.

In the afternoon of the same day, a nun from the Missionary Sisters for the Polish Diaspora Abroad wrote to me. She proposed to create a graphic design for the already published prayer. In the evening, this new version appeared on social media replacing the original one.

The next day, on Monday, I recited this prayer for the first time in the chapel of the Presidential Palace. On Tuesday, information about this prayer was transmitted by Radio RDN Małopolska. On Wednesday, one of the diocesan bishops assured me that he would forward it to all priests in his diocese, in order that it could be prayed in parish communities. On Thursday, a Vatican official whom I know, informed me that he was forwarding the prayer to everyone from his electronic address book.

At the same time, people began to contact me, willing to translate the prayer into foreign languages. It all happened spontaneously, confirming the significance and meaning of the prayer for many people in different parts of the world. My role was limited to expressing gratitude and posting subsequent versions of the prayer on Facebook. Also, I encouraged everyone to constantly pray for peace. Gradually, the prayer I initiated was translated into Ukrainian, Russian, Belarusian, Italian, Portuguese, Turkish, French, Spanish, Czech, English, German, Japanese, Arabic, Romanian and Korean. The Archbishop of Olomouc, who was keenly interested in praying for peace, helped with the translation into Czech. The translation into Arabic was made by a Muslim from Syria and a professor at one of Warsaw's universities. A few Koreans asked if the prayer was already available in their language. Having heard a negative answer, they said the translation would be ready the next day. One of the Krakow

publishing houses prepared a Polish-Ukrainian prayer book and placed this prayer on the first page.

Two years after writing this prayer for peace, I can admit that the way in which things developed was inspired by God. If the war in Ukraine continues, it means that we must not cease praying, that we must pray even more intensely for an end to the war, for a change of human hearts, for peace in the world. Apart from reciting the prayer, Christians are welcome to include other forms of penance and sacrifice.

Currently, this prayer is recited every day in the chapel of the Presidential Palace by those who participate in the Eucharist. People entering the chapel during the day can use the prayer text available at all times. The President of the Republic of Poland also does this. Particularly during the course of the first year of the war, the text of the prayer was passed on to Ukranians, during numerous group meetings.

## Prayer for the Homeland—a Competition

Another example of an initiative to pray, this time for the Homeland, is the organization of a competition by the weekly „Niedziela" in three categories: children, youth, and adults. For the first four months of 2018, this Catholic paper published the terms of the competition and invited people to write prayers, then reviewed them.

Despite initial concerns about whether the competition would meet with readers' response, approximately 2,000 prayer texts were received in three very proportional groups (children—primary school; youth—secondary school and students; and adults). In the competition commission, there were: Fr. Krzysztof Pawlina, poet, professor, and rector of the Catholic Academy in Warsaw; Fr. Wacław Buryła, a minister and poet; Anna Wyszyńska and Marian Florek from the editorial board of "Niedziela", and Fr. Zbigniew Kras, chaplain to the President of the Republic of Poland. Their task of selecting the best authors was not easy.

Ultimately, the first place among the children was shared by Małgorzata Kaczmarek for the prayer *Panie Boże, Królu nieba…* [Lord, King of Heaven] ex aequo with Maciej Dyl for *Kocham Polskę 7 lat.* [I have loved Poland for 7 years]. In the youth group, Julia Mączka was placed first for her prayer *Moja modlitwa za Ojczyznę* [My Prayer for the Motherland]. Among adult

competitors, Anna Oliwińska-Wacko won the first prize for her *Psalm polski* [A Polish Psalm].

On June 2, 2018, after a solemn Holy Mass for the Homeland in front of the image of the Black Madonna in Częstochowa, the competition winners heard the verdict and received their prizes. The weekly "Niedziela" published the best prayers in 2018, the year of the celebration of the 100th anniversary of Poland regaining independence. A few weeks later, the winners met with Mrs. Agata Kornhauser-Duda—the First Lady—at the Presidential Palace in Warsaw.

Fr. Zbigniew Kras, the initiator of the competition, compiled the 100 best prayers that were subsequently published in a volume titled "100 Prayers for Poland." In the book, one may easily find prayers for the Homeland and use them both privately and publicly, as well as during family, regional, and national occasions.

One may express love for the Homeland and concern for it in various ways. Christians know that every action for the Homeland should be supported by prayer. The above-mentioned collection of prayers can serve Poles of all ages and initiate new actions for the good of all inhabitants of Poland.

## Words of the prayer by Fr. Zbigniew Kras Chaplain of the President of the Republic of Poland

Merciful and gracious God,
Ruler of the world, Father of humanity
Lord of history, Prince of Peace!
Hear our loud cry
When the world is threatened with destruction and war.
In your name, we ask for peace for humanity.
Help us, Lord, to overcome anger and hatred,
That a man would not kill another man,
That the leaders of nations would shake hands in a friendly manner again
That lethal weapons would be locked back in their bases
And the armies would return to the barracks.
Lord Almighty,
We fold our present and future into your hands
We entrust to you the rulers and the ruled
Commanders and soldiers
Every man and every creature
Forgive us our weaknesses and sins

Provide us with your paternal care.
We ask for peace, harmony and love through You
Through the mediation of the Blessed Virgin Mary
Queen of Peace and Your saints

Amen. Amen. Amen.

# Reviews

*The Person and the Challenges*
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## Book review: Tomasz Kraj, *Catholic Attitude in Respect to Ethical Pluralism: the Example of Bioethics. A Study in Moral Theology*, Myśl Teologiczna Wydawnictwo WAM, Kraków 2023, pp. 209

Among many societies of the recent times certain signs of ethical pluralism (or value pluralism) can be observed. This is expressed mainly through diverse solutions to the same moral issue. What causes problem is that particular viewpoints compete with one another or even stand opposed. And yet they come acceptable. It ts claimed that ethical pluralism conditions the existance of democracy. Also, the phenomenon of ethical pluralism corresponds with rising anthropological narratives referring to the same moral issue. Thus the question emerges: Who is on the right side? Where is the truth? Are supporters of traditional morality based on natural moral law in accordance with the truth or rather those who choose new solutions? Catholics will be deeply concerned about the above questions as practising one's faith is closely related to moral life which is built on particular moral choices and their realisation.

As an answer to these inquiries, Rev. T. Kraj comes with his recent publication entitled *Catholic Attitude in Respect to Ethical Pluralism: the Example of Bioethics. A Study in Moral Theology*. Since 1999 he has been lecturing at the Papal

Academy of Theology (now Pontifical University of John Paul II in Cracow). Apart from the issues connected with fundamental moral theology, which the contents of this very book are part of, his field of scientific interest includes the issues related to the development of genetics. In 2010, the Author published *Accepted limits of genetic enhancement in humans* (Kraków 2010), responding to the query on where exactly nontherapeutic undertakings should come to an end.

The objective of the evaluated publication is to show the root of value pluralism in today's western culture, which not long ago stayed relatively homogeneous thanks to its relation to the Christian revelation. Relevantly for his purpose, the author chose bioethics to exemplify the presence of value pluralism in association with moral questions. Following the introductory part, which includes the mentioned objective of the written work (i.e. describing a Catholic's attitude towards ethical pluralism), the topics covered in the first chapter include numerous philosophical views in the field of bioethics (referred to as bioethical models). Although the work is strictly related to theology (fundamental moral theology), the author is conscious that the issue in question cannot be explained without making reference to philosophy. In this very context the role of philosophy is defined in theological reasoning.

In the second chapter the Author points out the factors that contributed to establishing western ethical pluralism. The views held by D. Hume played a vital role in this process. His most famost *Guillotine* is worth mentioning here, according to which there is no justification for moving away from descriptive statements ("is" statements) to prescriptive ones ("ought" statements). Rigid interpretation of the above mentioned thesis leads to conclusion that morality is a subjective matter only and that it relies on subjective assumptions and emotions rather than objective and rational statements. Such thinking had considerable influence on the shape of ethical thinking. However, at the end of the twentieth century it faced severe criticism from authorities like A. MacIntyre. It was then that the question on prior ethical reasoning—the reasoning questioned by modern philosophy—was raised which, by the way, contributed to a renewal of Aristotelian and Thomistic mode of thinking in the field of ethics (lasting in the Catholic theology in its main feature throughout the centuries). Additionally, chapter two explains the framework of ethical thinking, which relates to practical syllogism. The author, however, identifies the problematic issue which can be seen with Aristotle as well as with Saint Thomas Aquinas. It is also expressed by D. Hume, though not fully relevantly: how to move from the contents constituting a description of the reality (theoretical reason)

to moral prescription (practical reason)? What is the correlation between the two reasoning functions, descriptive and prescriptive ones? It was Aristotle who first claimed that moral normatives are not the result of theoretical activity of human reason. As to practical syllogism, the author shows that there is space for both theoretical and practical "reasons" to meet. It is called *nous* which stands for intellectual intuition, a form of metaphysical cognition. Taking into consideration the minor premise of syllogism, *nous* allows a man to introspect about the nature, aim, sense and value of the object in moral question. The ability to undertake such introspection has been undermined by modern philosophy.

Before the author explains the circumstances of the mentioned phenomenon, chapter three describes the perceptual model that can be found in classical epistemology which is: what and how a human reason gets knowledge from reality. The *form* of the perceived object plays a key role. Thus the author points out the cognitive activity of theoretical reason. He reminds the fundamental notion of the truth of things. In the epistemology of Saint Thomas Aquinas the notion of the truth of things relates to the possibility to know every existing entity. Objects are intelligible as they exist and so they are in reach of a man's knowing and understanding, who thus is able to investigate their nature, aim, meaning or value. The knowledge of things does not limit itself to the substance being researched into by empirical sciences, namely phenomenological insights. The author elaborates on the mentioned topic in the fourth chapter of his work.

Truth is an essential trait that characterises human knowing. In human mind each truth is measured by correlating it with the objective reality. This dependence refers to the process of cognition. However, classical philosophy also dealt with creation order which briefly referred to the idea that every created being (if true, it matches) its creator's design. The creator places his design into a given being and it may be referred to as true as long as there is a correlation between the being and its creator's design. Through a created thing and thanks to the truth contained in it, it is possible for people to know a creator's idea behind a given created object. It happens though that certain things and beings are created by God and through investigating into the truth of things (beings) one is able to discover God's design and intention inscribed in His creations, such as people, nature, human life, sexuality and so forth. All those relationships and possibilities are in the field of interest of classical metaphysics which was rejected as part of modern philosophy. Moreover, cognitive abilities were

negated, which was what classical metaphysics paid attention to. On the basis of J. Pieper's analysis, in the last part of the mentioned fourth chapter, Rev. Kraj shows how it came to the negation of getting knowledgable about the reality and what grounded such negation.

The last chapter introduces the effects of negation, not excluding theological implications, which are significant to a Catholic. One of the first consequences was a new branch of philosophy—ontology—that replaced the rejected metaphysics. There is a huge difference between ontology and metaphysics. Metaphysics researches into being whereas ontology reflects on the conditions of existing. The latter one relates to human reason, which is obviously limited and yet it remains accurate point of reference to each and every being that a human may encounter. Here it turns out that ontology tends to take place of the rejected metaphysics, trying at the same time to redefine existing entities. What it means in practice is that new structures, aims, a new sense or value of a given being replace the existing descriptive meanings, which have, been considered unrecognisable. Here, though, they are defined by a human being, often making it his autonomous idea of the description of a given reality. The author explains how it is done. At the same time, he perceives it as one of the main thresholds of the present cultural pluralism, including ethical pluralism which derives itself from a process of attaching a new "label" (different from the original one) to entities that already exist. The concise conclusion, the bibliography and the index of names constitute the last part of the work of the Cracovian thinker.

One of the advantages of the author's work is that it strives to account for the reasons of the existance of serious moral dilemmas that a Polish Catholic (and other Catholics too) are facing at present times. It is worth mentioning that the author does not use stereotypes or other common thinking. Quite the opposite. What the mainstream trends would refuse nowadays, the Cracovian theologian makes one of his manners of thinking through which he communicates with the reader, which is rather sharing thoughts and opinions that may be perceived as unfamiliar with today's Aeropagus, and yet, as the reviewed book presents, much useful as far as an explanation of the subject matter is concerned, and still remaining in accord with the Church teaching. It seems that the book would be of greater value if it included an index of topics and a summary in English or other foreign language (although the lack of the above mentioned translation shows itself as the characteristic for the prestigious "Myśl teologiczna" series). Such translation would enable a non-Polish reader to know at least the main stream of the author's discourse.

One of the many qualities of the publication is the author's openness to the argumentation other than coming from theological studies. Thus it is not a repetition or yet another articulation of "Church" statements but an authentic challenge given to doctrinal adversaries on the basis of a clear and coherent approach to reality. In this way a vast part of his study, although taken up within the frames of moral theology, deals with philosophical thinking as an open domain for dialogue with those who do not share the Catholic views as well as with some of the Catholics claiming that thoelogical argumentation is no longer convincing in today's world. In this manner the author proves that Catholic moral theology is efficient in disputing diverse topics, including complex matters, and it is ready to deal with different viewpoints and philosophical arguments.

In the reviewed publication, Rev. Kraj reveals the weakness of some of the arguments articulated by modern philosophy. As the author underlines, modern philosophy has rejected classical metaphysics and its key understanding of the truth as a property of things without indicating its lack of logic, incoherence or other weak points. In fact, what has been rejected is not the truth itself but a wrong concept of the truth that modern philosophy has invented. Nevertheless, the rejection effects in serious theological consequences, as shown by the author. It is also proved that there are at least two reasons standing for the importance and value of the knowledge of classical metaphysics. Namely, classical metaphysics acknowledges a human being's capacity to know the whole of the truth about being. This is of crucial importance to classical ethics, for a man furnished with complete knowledge on being will prove to be capable of making conscious decisions, as well as adequate moral choices. Moreover, the understanding of classical metaphysics goes well with theology, a branch applying to God the Creator, who has inscribed His intention in all of His creation, making a man able to recognise His design (which does not mean it comes with no effort). In this way it is possible for Catholics to live their moral life according to the Creator's will. Refusing to welcome this truth gives "theoretical" grounds for imposing on many entities a new and often strange meaning, leading to "create" a new (pluralistic) world, which all in all remains just an illusion of the existing reality.

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