

No. 27 (4/2019)

*perspektywy* **kultury**

*perspectives* on culture

Czasopismo naukowe  
Instytutu Kulturoznawstwa  
Akademii Ignatianum w Krakowie

**Rozprawianie o tożsamości**  
**Talking about Identity**

Czasopismo naukowe Instytutu Kulturoznawstwa Akademii Ignatianum w Krakowie  
Academic Journal of the Institute of Cultural Studies, Jesuit University Ignatianum in Krakow

PISMO RECENZOWANE / PEER-REVIEWED JOURNAL

**Zespół redakcyjny / Editorial Board:** dr Łukasz Burkiewicz (redaktor naczelny / editor-in-chief);  
dr hab. Leszek Zinkow, dr Paweł Nowakowski (z-ca redaktora naczelnego / deputy editor-in-chief);  
mgr Magdalena Jankosz (sekretarz redakcji / editorial assistant); dr Danuta Smołucha (redaktor  
działu – Przestrzenie cyberkultury, editor – Areas of Cyberculture); dr Agnieszka Knap-Stefaniuk  
(redaktor działu – Zarządzanie międzykulturowe, editor – Cross-cultural Management);  
dr Bogusława Bodzioch-Bryła (redaktor tematyczny – e-literatura, nowe media); dr hab. Andrzej  
Gielarowski, prof. AIK (redaktor tematyczny – filozoficzne aspekty kultury);  
dr hab. Monika Stankiewicz-Kopeć (redaktor tematyczny – literatura polska)

**Rada Naukowa / International Advisory Council:** dr hab. Eva Ambrozová (Newton College, Brno);  
dr Josep Boyra (Escola Universitària Formatic Barcelona); dr Jarosław Duraj SJ (Ricci Institute,  
Macau); prof. dr hab. Tomasz Gąsowski (Akademia Ignatianum w Krakowie); prof. dr Jakub  
Gorczyca SJ (Pontificia Università Gregoriana, Rzym); prof. dr Marek Ingłot SJ (Pontificia Università  
Gregoriana, Rzym); doc. Petr Mikuláš PhD (Univerzita Konštantína Filozofa v Nitre); prof. dr hab.  
Henryk Pietras SJ (Pontificia Università Gregoriana, Rzym); dr hab. Janusz Smołucha, prof. AIK  
(Akademia Ignatianum w Krakowie); dr Joan Sorribes (Escola Universitària Formatic Barcelona);  
dr hab. Stanisław Sroka, prof. AIK (Akademia Ignatianum w Krakowie); dr M. Antoni J. Üçerler SJ  
(University of San Francisco); dr Zdeněk Vybíral (Husitské Muzeum, Tabor)

**Współpraca / Cooperation:** dr Aneta Kliszcz, mgr Marta Cetera, mgr Katarzyna Krupicka,  
mgr Małgorzata Golik, mgr Michał Pikul (Akademia Ignatianum w Krakowie)

**Redaktor tekstów / Copy editor:** Magdalena Jankosz  
**Projekt graficzny / Graphic design:** Joanna Panasiewicz  
**Tłumaczenia / Translation:** Karolina Socha-Duško  
**Okładka / Cover:** Code People Błażej Dąbrowski  
**Skład i opracowanie techniczne / DTP:** Jacek Zarzycny

ISSN (paper): 2081-1446

**Deklaracja / Declaration:** wersja papierowa czasopisma jest wersją pierwotną /  
Original version of journal is a paper version.

Nakład / Print run: 120 egz.



Ministerstwo Nauki  
i Szkolnictwa Wyższego

Czasopismo jest finansowane ze środków Ministra Nauki i Szkolnictwa Wyższego  
w ramach programu „Wsparcie dla czasopism” – umowa nr 12/WCN/2019/1



Ministry of Science  
and Higher Education  
Republic of Poland

The journal is funded by the competition „Support for Scientific Journals 2019-2020”  
organised by the Ministry of Science and Higher Education in Poland (12/WCN/2019/1)

Adres redakcji / Publisher Address  
ul. Kopernika 26, 31-501 Kraków  
e-mail: [perspektywykultury@ignatianum.edu.pl](mailto:perspektywykultury@ignatianum.edu.pl)  
tel. 12 399 96 62

## *Spis treści / Table of contents*

---

Leszek Zinkow, *Od redakcji*

5

Leszek Zinkow, *From the Editors*

9

### Talking about Identity / Rozprawianie o tożsamości

Piotr Duchliński, Agata Płazińska, *Metaphysical and Cultural Nature of Sacrifice in the Life and Death of E. Stein and S. Weil*

13

Mariusz Szram, *Ojcowie Kościoła o tożsamości teologii*

41

Ewelina Kurowicka-Roman, *Christian Identity of a Teacher of Early Education in the Contemporary World*

63

Kamil Roman, *Shaping the National Identity of the Youth in the Polish Scouting Association (ZHP)*

75

### Cross-cultural Management / Zarządzanie międzykulturowe

Michał Szkoła, *Silesian Theological Seminary and Częstochowa Theological Seminary in Krakow—the Heritage of the Interwar Period. A Study of the History of Organization Management*

91

Ewa Kopeć, Artur Wolanin, *Significance of Strategic Alliances; the Case of Airline Alliances*

107

Nasri Messarra, Anne Mione, *Negative WoM and its Transmission on OSN: The Determining Role of the Seeding Population*

127

European Spiritual Heritage / Duchowe dziedzictwo Europy

Krzysztof Koehler, *Old Polish Writers and Freedom of Expression.*

*Reconnaissance*

*153*

Areas of Cyberkulture / Przestrzenie cyberkultury

Danuta Smołucha, *Eye-tracking in Cultural Studies*

*169*

Varia

Małgorzata Rygielska, „*Dono del sangue*”. *The Research by Fabio Dei on the Cultural Conditions of Blood Donation in Italy*

*185*

Barbara Geneja-Pietrzak, *The Spruce in the Culture of the Podhale Shepherds*

*201*

Małgorzata Lebda, *Seeing as Action. The Methods of Interpreting Visual Materials on the Example of Photography*

*219*

Others

Łukasz Burkiewicz, *Sprawozdanie z konferencji naukowej pt. Cmentarz – dziedzictwo materialne i duchowe zorganizowanej przez Instytut Kulturoznawstwa Uniwersytetu Marii Curie-Skłodowskiej w Lublinie oraz Stowarzyszenie „Studnia Pamięci” z Lublina (21-22 października 2019 r.)*

*235*

Leszek Zinkow

<http://orcid.org/0000-0003-0681-7428>

Akademia Ignatianum w Krakowie

[leszek.zinkow@ignatianum.edu.pl](mailto:leszek.zinkow@ignatianum.edu.pl)

DOI: 10.35765/pk.2019.2704.01

## Od redakcji

---

Temat tytułowy 27 numeru kwartalnika „Perspektywy Kultury” kieruje zapewne intuicję Czytelnika w stronę refleksji filozoficznej. I tak właśnie jest. Podstawowa definicja słownikowa „tożsamości” wskazuje na synonim tego terminu – „identyczność”, a dalej – fakty, cechy, dane personalne pozwalające zidentyfikować jakąś osobę. Głębsza, humanistyczno-społeczna definicja odsyła jednak w obszar samoświadomości, ale i poczucia jedności wspólnoty, elementów tę wspólnotę warunkujących. Te elementy to zwłaszcza kultura, wartości, w końcu wspólnotowość postrzegana w wymiarze metafizycznym, wzniosłe ideały moralne i religijne. Dwoje autorów filozofów, Agata Płazińska i Piotr Duchliński z Akademii Ignatianum, proponują refleksję nad metafizyczno-kulturotwórczym charakterem ofiary na przykładzie życia i śmierci Edyty Stein i Simone Weil, nad sensem aktu ofiary w imię wyższych wartości. W naszym kręgu kulturowym taką wartością jest np. oddanie własnego życia za innego człowieka. Jest to ofiara, którą można określić jako absolutną. Wbrew współczesnemu kryzysowi, który przeżywają metafizyka i aksjologia, właśnie takie „absolutne czyny” są istotnymi i nieusuwalnymi elementami tożsamościowymi naszej kultury. W drugim tekście, pióra ks. Mariusza Szrama z Katolickiego Uniwersytetu Lubelskiego Jana Pawła II, cofamy się wiele wieków wstecz, do czasów Ojców Kościoła, aby razem z autorem pochylić się nad refleksją teologiczną o tworzeniu monumentalnej spójności myśli semickiej i helleńskiej, definiującej tożsamość chrześcijaństwa. Dwie kolejne, ciekawe analizy w naszym dziale tytułowym to *Chrześcijańska tożsamość nauczyciela wczesnej edukacji we współczesnym świecie* Eweliny Kurowickiej-Roman (KUL JP II) oraz *Kształtowanie tożsamości narodowej młodzieży w Związku Harcerstwa Polskiego (ZHP)* Kamila Romana (także z KUL-u).

Kilka interesujących artykułów włączonych zostało w nasz stały dział „Zarządzanie międzykulturowe”. Michał Szkoła (AIK) na dość intrygującym i oryginalnym przykładzie Śląskiego Seminarium Duchownego oraz Częstochowskiego Seminarium Duchownego w Krakowie proponuje analizę wielowątkowego zarządzania tymi instytucjami w kontekście międzywojennych uwarunkowań kulturowych, politycznych i społecznych. Studium Ewy Kopeć i Artura Wolanina (również AIK) przenosi nas natomiast w świat współczesnych biznesowych aliansów strategicznych w niezwykle ciekawym obszarze przedsiębiorstw lotniczych różnych przewoźników narodowych. Autorzy wskazują, jak skuteczne, korzystne ekonomicznie i synergiczne są takie przedsięwzięcia, w których podmioty nie byłyby w stanie osiągnąć sukcesów samodzielnie. Również para autorów: Nasri Messarra z Université Saint-Joseph of Lebanon i Anne Mione z Université de Montpellier wprowadzi – na podstawie ciekawego eksperymentu – w problematykę złożonych relacji i struktur współczesnych mediów społecznościowych.

W dziale „Duchowe dziedzictwo Europy” proponujemy bardzo interesującą analizę historycznokulturową: tekst Krzysztofa Koehlera z UKSW, *Pisarze staropolscy a wolność wypowiedzi. Rekoniesans*, omawia zagadnienie tytułowe jako osobny temat podejmowany przez pisarzy doby staropolskiej. Czy wolność wypowiedzi była jedną z dostrzeganych przez pisarzy staropolskich wolności obywatelskich, charakterystycznych dla świadomości politycznej dawnej szlachty? Natomiast w „Przestrzeniach cyberkultury” Danuta Smołucha (AIK) zwraca naszą uwagę na problemy eye-trackingu w badaniach kulturowych; niestandardowej metody, która polega na śledzeniu ruchu gałek ocznych, a wyniki badań pozwalają na dokładne wskazanie tego, na czym skupiamy największą uwagę, a co ignorujemy i czego nie dostrzegamy. To niesłuchanie istotne np. w badaniach reklamy i rynku konsumenckiego.

Na zakończenie, w dziale „Varia”, trzy interesujące teksty. Małgorzata Rygielska z Uniwersytetu Śląskiego w Katowicach w artykule „*Dono del sangue*”. *O badaniach Fabia Dei nad kulturowymi uwarunkowaniami krwiodawstwa we Włoszech* przedstawia przebieg i omawia rezultaty badań dotyczących krwiodawstwa we wspólnotach imigranckich (rumuńskich i senegalskich), przeprowadzonych przez antropologa kultury Fabia Dei i jego zespół. Barbara Geneja-Pietrzak (AIK) pisze o niezwykle intrygujących, religijno-magicznych przejawach kultu świerka w kulturze pasterzy podhalańskich. Co ciekawe, magia związana z kulturą pasterską znalazła swoje odbicie również w literaturze polskiej oraz poezji gwarowej. Małgorzata Lebda natomiast (Uniwersytet Pedagogiczny w Krakowie) proponuje tekst *Widzenie jako działanie. O sposobach interpretacji materiałów wizualnych na przykładzie fotografii*, w którym próbuje znaleźć

odpowieź na pytanie o indywidualne sposoby patrzenia, analizowania i interpretowania.

Życzymy przyjemnej i pożytecznej naukowo lektury!



**Leszek Zinkow** – jego zainteresowania naukowo-badawcze obejmują zagadnienia kulturowych studiów porównawczych, zwłaszcza recepcję dziedzictwa starożytnego Wschodu (głównie Egiptu: narracji historyczno-mitologicznych, symboliki). Zajmuje się także podróżopisarstwem z destynacją orientalną (edycje tekstów), dziejami muzeów i kolekcjonerstwa, ponadto – historią kultury współczesnej, historią oraz praktyką mediów, społeczną historią nauki, problematyką transferów i innowacji kulturowych. W 2016 r. otrzymał na Uniwersytecie Śląskim stopień doktora habilitowanego. Członek International Association of Egyptologists (Moguncja), Polskiego Towarzystwa Kulturoznawczego oraz Komisji Filologii Klasycznej Polskiej Akademii Umiejętności (Kraków). Zastępca redaktora naczelnego „Perspektyw Kultury”, w latach 2013-2016 redaktor naczelny.





Leszek Zinkow

<http://orcid.org/0000-0003-0681-7428>

Jesuit Ignatianum University in Krakow

[leszek.zinkow@ignatianum.edu.pl](mailto:leszek.zinkow@ignatianum.edu.pl)

DOI: 10.35765/pk.2019.2704.02

## From the Editors

---

The title subject matter of this Issue 27 of our quarterly “Perspectives on Culture” is likely to direct the Reader’s intuition toward philosophical reflection. And rightly so. The basic dictionary definition of “identity” provides one meaning of the term signifying a state of being identical, and further, implies the facts, features, and personal information allowing one to identify a person. However, a deeper, humanistic and social definition refers to the area of self-awareness, but also a sense of unity with the community, and the elements that determine it. These elements are especially culture, values, and finally, the community itself as seen in the metaphysical dimension, i.e., high moral and religious ideals. Two authors—philosophers, Agata Płazińska, and Piotr Duchliński from the Ignatianum University, propose their reflections on the metaphysical and culture-building nature of self-sacrifice as represented by the lives and deaths of Edith Stein and Simone Weil, and the meaning of self-sacrifice in the name of higher values. In our culture, such value might lie in giving one’s life for another human being. It is a kind of sacrifice which can be described as an absolute one. Contrary to the present crisis in metaphysics and axiology, such “absolute acts” are essential and indelible elements of identity in our culture. In the second text, Fr. Mariusz Szram from the John Paul II Catholic University of Lublin goes back many centuries, to the time of the Fathers of the Church, to explore the theological reflection on creating a monumental cohesion of Semitic and Hellenic thought, defining the identity of Christianity. Two other interesting analyses in our title section are *Christian Identity of a Teacher of Early Education in the Contemporary World* by Ewelina Kurowicka-Roman (KUL JPPII) and *Shaping the National Identity of the Youth in the Polish Scouting Association (ZHP)* by Kamil Roman (also from the Catholic University of Lublin).

Several interesting articles have been included in our permanent section, "Cross-cultural Management." Michał Szkoła (AIK) examines quite intriguing and original examples of the Seminary of Silesia and the Częstochowa Seminary in Krakow, offering an analysis of the multi-aspect management of these institutions in the context of cross-cultural, political and social conditions. A study by Ewa Kopeć and Artur Wolanin (also from AIK) takes us into the world of today's business strategic alliances, in the highly interesting area of various national airline companies; they indicate how effective, economical and synergistic are such projects in which the companies would not be able to be successful otherwise. Another tandem of authors: Nasri Messarra from the Université Saint-Joseph of Lebanon and Anne Mione of Université de Montpellier, introduce an interesting experiment on the problems of complex relationships and structures in the modern social media.

In the "European Spiritual Heritage" section we offer a very interesting historical-cultural analysis by Krzysztof Koehler of UKSW, *Old Polish Writers and Freedom of Expression. Reconnaissance*. It discusses the title issue as a separate theme picked up by historical Polish writers of the day. Was freedom of expression one of the civil liberties perceived by Polish writers of old, as a characteristic of the political awareness of the old nobility? In the "Spaces of Cyberculture" section, Danuta Smołucha (AIK) draws our attention to the issue of eye-tracking in cultural research. Eye-tracking is a non-standard method that involves tracking the movement of the eye-balls, and the results of the research allow us to precisely indicate what we focus our attention on and what we ignore and miss. It is extremely important for example in studies on advertising and consumer market.

Finally, the "Varia" section includes three further interesting papers: by Małgorzata Rygielska from the University of Silesia in Katowice, "*Dono del sangue*." *The Research by Fabio Dei on the Cultural Conditions of Blood Donation in Italy* in which the author presents the course and results of research on blood donorship in immigrant communities (Romanian and Senegalese), conducted by Fabio Dei, a cultural anthropologist, and his team; Barbara Geneja-Pietrzak (AIK) writes about intriguing, magical-religious manifestations of spruce tree worship in the culture of the Tatra shepherds. Interestingly, the magic associated with the shepherd culture has also been reflected in Polish literature and dialect poetry. Last but not least, Małgorzata Lebda (Pedagogical University of Krakow) proposes a text *Seeing as Action. The Methods of Interpreting Visual Materials on the Example of Photography* which attempts to find an answer to the question of individual ways of looking, analyzing and interpreting.

As always, we wish you a pleasant and useful scientific reading!



**Leszek Zinkow**—his research interests include comparative culture studies, in particular the reception of the heritage of the ancient Middle East (mainly Egypt and its historical and mythological narratives and symbolism). Also deals with travel accounts to oriental destinations (editions of texts), the history of museums and collecting, in addition to the history of contemporary culture, the history and practice of the media, the social history of science, transfers, and cultural innovation. In 2016 he received the Associate Professor degree at the University of Silesia. He also works at the John Paul II Pontifical University. Member of the International Association of Egyptologists (Mainz), Polish Society of Cultural Studies and the Commission of Classical Philology at the Polish Academy of Sciences (Krakow). Deputy editor-in-chief of the “*Perspektywy Kultury*” magazine; editor-in-chief in the years 2013-2016.



**Piotr Duchliński**

<http://orcid.org/0000-0001-9480-2730>

Jesuit University Ignatianum in Krakow

[piotr.duchlinski@ignatianum.edu.pl](mailto:piotr.duchlinski@ignatianum.edu.pl)

**Agata Płazińska**

<http://orcid.org/0000-0003-2720-855X>

Jesuit University Ignatianum in Krakow

[agataplazinska@o2.pl](mailto:agataplazinska@o2.pl)

DOI: 10.35765/pk.2019.2704.03

---

# Metaphysical and Cultural Nature of Sacrifice in the Life and Death of E. Stein and S. Weil

---

## ABSTRACT

The article explains the metaphysical, culture-making and creative act sacrificing one's own life in the name of higher values. At the beginning we discuss the causes of a contemporary cultural crisis and the disappearance of metaphysical attitudes. We have formulated a thesis that the revival of metaphysics in contemporary culture can be grounded in the experience of metaphysical qualities that are present in heroic acts of offering one's own life for another. The next step in our analysis was to identify the necessary and sufficient conditions for self-sacrifice, and then, on the examples of E. Stein and S. Weil, we show what the ultimate sacrifice of one's own life is. Using the method of humanistic interpretation, we have reconstructed the descriptive and normative reasons which motivated the two women to their acts of self-sacrifice. And although Weil and Stein do not meet the criteria to be categorized as self-sacrifices, we have found that they indeed were ultimate sacrifices because they were directed towards the realization of the highest moral and religious ideals. Using the category of "metaphysical qualities" developed by the Polish phenomenologist Roman Ingarden, we proposed an interpretation in which the sacrificial act was interpreted as supererogation in which metaphysical qualities such as holiness, sublimity, etc. are phenomenologically present. Such an act also has

a cultural-creative dimension, consisting in building a culture and civilization of life in which the value of the existence of another human being is a correlate of a metaphysical desire rather than biological and psychological needs. The thesis is that, contrary to the contemporary crisis in metaphysics and axiology, they are essential and irremovable elements of culture, without which it cannot grow properly.

**KEY WORDS:** philosophy of humanities, sacrifice, gift, Simone Weil, Edith Stein, humanistic interpretation, supererogation

## STRESZCZENIE

*Metafizyczno-kulturotwórczy charakter ofiary na przykładzie życia i śmierci E. Stein i S. Weil*

W artykule objaśniamy, na czym polega metafizyczny i kulturotwórczy sens aktu ofiary dokonanego z własnego życia w imię wyższych wartości. Na początku omówiliśmy przyczyny współczesnego kryzysu kultury i zaniku postaw metafizycznych. Sformułowaliśmy tezę, że odrodzenie metafizyki we współczesnej kulturze może być ugruntowane w doświadczeniu jakości metafizycznych, które uobecniają się w czynach heroicznych polegających na złożeniu ofiary z własnego życia za drugiego człowieka. Następnym krokiem w naszych analizach było określenie koniecznych i wystarczających warunków do bycia ofiarą, a dalej na przykładzie E. Stein oraz S. Weil pokazaliśmy, czym jest ofiara absolutna z własnego życia. Przy pomocy metody interpretacji humanistycznej zrekonstruowaliśmy przesłanki opisowe i normatywne, które zmotywowały owe kobiety do podjęcia czynu ofiarniczego. I choć ofiary Weil i Stein nie spełniają podanych kryteriów umożliwiających zaliczenie ich czynu do kategorii ofiary, to jednak uznaliśmy, że są to ofiary absolutne ze względu na to, że były skierowane na realizację najwyższych ideałów moralnych i religijnych. Wykorzystując opracowaną przez polskiego fenomenologa Romana Ingardena kategorię „jakości metafizycznych”, zaproponowaliśmy interpretację, w której czyn ofiarny został zinterpretowany jako czyn supererogacyjny; fenomenologicznie uobecniają się w nim jakości metafizyczne, takie jak świętość, wzniosłość itp. Taki czyn ma również wymiar kulturotwórczy, polega na budowaniu kultury i cywilizacji życia, w których wartość istnienia drugiego człowieka jest korelatem pragnienia metafizycznego, a nie potrzeb o charakterze

biologicznym i psychologicznym. W artykule wykazano, że aksjologia i metafizyka mają do odegrania ważną rolę w przewyciężeniu współczesnego kryzysu kulturowego.

**SŁOWA KLUCZE:** filozofia humanistyki, ofiara, dar, Edyta Stein, Simone Weil, interpretacja humanistyczna, supererogacja

Is there an idea of such an importance and greatness today at all to be worth to devote all your strength to in order to make it a reality?

Robert Musil, *The Man Without Qualities*<sup>1</sup>

## 1. Culture and metaphysics at a crossroads

The question asked by Robert Musil nearly a hundred years ago has not lost its relevance. Despite the progressing historical and cultural changes, we can still ask: is it worth sacrificing one's life for lofty ideas? Is there anything that makes a person not only give up the greatest gift that is life but also see it as their duty? Referring to the words of the Austrian writer, we will focus here on contemporary culture, where we can and even should ask about the existence of great ideas, especially those derived from the metaphysical reflection that shaped Western culture. Surely, we can say that modern culture is not conducive to the development of metaphysical reflection, leaving man facing the crisis, which has already begun in the nineteenth century thanks to the masters of suspicion (Marx, Freud, or Nietzsche) and continued in the twentieth century brought about by postmodernists and poststructuralists.<sup>2</sup> Using the term “contemporary

---

1 R. Musil, *Człowiek bez właściwości*, transl. by K. Radziwił, K. Truchanowski, J. Zeltert, Vol. I, Warszawa 1971, p. 35.

2 “Because metaphysics is passing, it is gone. The past does not exclude, but it does include the fact that it is only now that metaphysics takes absolute power in the very being and as such in the untruthful shape of the real and the objects. Experienced at the beginning of the beginning, metaphysics is also past in the sense that it has entered into its running-out. The running-out *lasts* longer than the last previous history of metaphysics ... Since man is the most important raw material, one can reckon with the fact that on the basis of today's chemical research factories will be built in the future to artificially produce human material ... (One should not resort to differences that no longer exist out of outdated prudery. The demand for human material is subject to the same rules of ordering as the demand for entertainment books and poetry, for the production of which the poet is no more important than a bookbinding apprentice who

culture,” we can speak of a multitude of meanings of this term, in which they are conditioned by the assumptions and concepts adopted. We will not cite all definitions of contemporary culture, nor will we attempt to demonstrate its negative assessment, or try to highlight its positive aspects, but we will focus on answering the question: or in contemporary culture, there may be opportunities cheating metaphysical value, which should be ready to bear the sacrifice, especially the sacrifice of his own life? Talking about contemporary culture and the potential of a metaphysics of sacrifice therein, we may ask whether the human being is willing to accept a metaphysical attitude which expresses itself in the readiness to make sacrifices?<sup>3</sup> Or otherwise, can we sadly conclude that contemporary culture has focused solely on consumerism, in which there is no place for sacrifice? Thinking about the presence of metaphysical idea in modern culture we have in mind the cultural phenomenon that sacrifice is and its metaphysical justification. The term “culture” has about one hundred fifty different definitions, which covers a wide range of phenomena and meanings.<sup>4</sup> The multiplicity of meanings and possibilities of interpretation results in the fact that we do not have a transparent definition of culture. A similar problem is posed by attempts to analyze the subject matter of sacrifice. The use of this concept in different cultural contexts proves to be ambiguous. Using the term “sacrifice” we refer to the definitions<sup>5</sup> that primarily emphasize

---

helps to bind them for some company library, for example by carrying a cardboard box for covers from a magazine). M. Heidegger, *Overcoming Metaphysics*, in: idem, *Odczyty i rozprawy*, transl. J. Mizera, Warszawa 2007, pp. 65, 89.

- 3 Such authors as Karol Tarnowski have asked about the contemporary crisis of metaphysics: “Is metaphysics capable of surviving the criticism to which it has been subjected today, both by Heidegger and by Anglo-Saxon philosophers? To survive not in the sense of the sclerotic tenacity of certain forms of thinking envisaged by Heidegger, but to somehow prove the legitimacy of questions and experiences on which metaphysics is based?”, in: *Człowiek i transcendencja*, Kraków 1995, p. 125.
- 4 Cf. A. Kłoskowska, *Kultura masowa. Krytyka i obrona*, Warszawa 1964; A. Kłoskowska, *Sociologia kultury*, Warszawa 2007; Z. Bauman, *Kultura jako praxis*, Warszawa 2012; G. Simmel, *Filozofia kultury*, Kraków 2007; R. Benedict, *Wzory kultury*, Warszawa 2002; M. Gruchola, *Kultura w ujęciu socjologicznym*, “Roczniki Kulturoznawcze,” Vol. 10, 2010.
- 5 Józef Tischner believes that sacrifice in Christianity was most fully revealed in Christ’s death on the cross: “sacrifice is more than just cruelty. It shines with additional splendor and sheds light on dedication, which has become a great human possibility. Sacrifice means pain and meaningful death. It makes sense that the victim grows out the cruelty. Man is capable of being a sacrifice. Actually, only man,” in: J. Tischner, *Myslenie w żywiole piękna*, Kraków 2013, p. 307. According to the philosopher, the idea of sacrifice confronts us with drastic situation. As an example, Tischner gives making a sacrifice to buy out a slave. “A slave is not able to redeem himself from the bondage; there must be a person who will have such opportunities. By making the sacrifice, they becomes a savior, but the act of redemption, in a sense, becomes an act directed against one’s self. Redemption of a slave is not a purchase, but liberation. This dramatic



its voluntary nature, pointing to the basic conditions that must be met so that we can consider an act as such. Our attention should focus on the meaning of sacrifice as an act of supreme dedication of giving one's own life with an indication of its metaphysical character. The act of sacrificing one's life in the name of ideals and values places many questions about our existence in the world before us. Indeed, we may ask: why would sacrifice make metaphysical values emerge? By asking these types of questions we refer directly to the human being and its metaphysical desires. Although the term metaphysics itself is loaded with ambiguity, the question about it and its presence in contemporary culture becomes indispensable in the context of human existence, which today lost its orientation in reality and is lost in the world indeed. We can formulate questions not only about the possibility of the existence of metaphysics, but also about its form, which has changed throughout history, and also about its role in contemporary culture.<sup>6</sup> Our considerations herein focus on the disappearance of the sense of metaphysical desire which is associated with technological progress and the cultural changes that result from it.<sup>7</sup> Contemporary culture, despite the dynamic development of consumerism and the introduction of new technologies, is trying to exclude all manifestations of metaphysical reflection.<sup>8</sup> One that focuses only on the search for new experiences, drawn into the consumer chain of culture, loses themselves, and ceases to ask about the final overall sense of their existence and whatever will happen next. The present day has somehow imprisoned man in its narrow frames, which only seemingly seem to be wide. In fact, it offers narrow confines of consumerism, which is about the exchange of material goods. The result of such a state of human consciousness is the confession of an ephemeral attitude to life as the here and now. The lack of reflection on one's own existence is not, however, a common phenomenon, but rather,

---

understanding of sacrifice directs the thought of the philosopher into the core of the philosophy of Emmanuel Lévinas. Thus understood, sacrifice becomes responsibility for another who is in captivity. Responsibility will always imply facing a choice, because it chooses me calling in the face of the Other. Taking responsibility for the Other will always eventually become a sacrifice." Ibidem.

6 Cf. J. Jusiak, *Myslenie metafizyczne i niemetafizyczne*, "Przegląd Filozoficzny," Iss. 2, 1994.

7 Cf. J. Breczko, *Zanik uczuć metafizycznych jako przyczyna kryzysu kultury*, "Kultura i Wartości," Iss. 13, 2005.

8 Metaphysics, despite its diverse understanding and interpretation in the history of philosophy and its currents, asks basic questions about being and its existence. We can say that metaphysical questions should be permanent elements of human being in the world and their role should be to reflect on what has not been directly given to us. As stressed by W. Stróżewski: "the task of metaphysics is therefore to search for the ultimate justification of reality, which particular sciences are not able to satisfy." W. Stróżewski, *Ontologia*, Kraków 2004, p. 39.

we can define it as dormant or partially marginalized. The dormant metaphysical desire does not condemn metaphysics to exclusion, as evidenced by the willingness of some people to sacrifice their lives in the name of higher values that the tradition of the Western culture, strongly shaped by Christianity, has always defended. The question about metaphysics and its influence on culture also includes an attempt to see the conditions of the possibility of sacrificing one's own life. The possibility of a renewal of metaphysics is connected with asking the human person about the sense and ultimate destiny of their life.<sup>9</sup> The question of metaphysics that we put forward raises another, on the metaphysical desire for higher values in the name of which man is willing to make a sacrifice of their life. Such a sacrifice is an absolute testament a human being makes in the name of higher values. The example of sacrificing one's own life to which we refer herein was motivated by a sense of solidarity with other people and an act of moral obligation addressed to them.

In addressing the issue of the possibility of making a sacrifice of one's life, we must pay attention to the problem of the crisis of contemporary culture, in which metaphysical thinking is often rejected and replaced by scientific thinking. In a way, Transcendence has been ostracized from the world. Man, in a world without metaphysics easily forgets the existence of another man who often requires our help. So, we may ask: is there space in our times, for the highest kind of sacrifice, which is giving up one's own life? We shall refer to two examples—Edith Stein and Simone Weil, who gave a positive answer to this question with their heroic attitudes, thus confirming their faithfulness to their own beliefs by making a voluntary sacrifice. The selection of these two women was justified not only by their similar life attitudes but also by other numerous analogies between them. The lives of both of them went on in the shadow of two world wars. They were both philosophers and both had Jewish roots. The biography of each one of them shows the desire to seek the ultimate truth that they found in Christianity without completely separating themselves from the religion of their ancestors.<sup>10</sup> However, the most important shared characteristic by both women was their full awareness of their chosen attitude and the voluntariness of their sacrifice. One made hers in the Auschwitz concentration camp, and the other, who was suffering far from her homeland, died as a result of exhaustion and deliberate starvation. By discussing the most important events in the lives of the two heroines and then juxtaposing

9 K. Śnieżyński, *Filozofia sensu jako odpowiedź na kryzys metafizyki. W stronę nowej „filozofii pierwszej”*, „Poznańskie Studia Teologiczne,” Vol. 22, 2008, p. 215.

10 This issue is debatable in the case of talking about the attitude of Simone Weil. Cf. E. Levinas, *Trudna wolność. Eseje o judaizmie*, Warszawa 1991.

them with each other, we shall attempt to point out the events in their lives which may indicate a voluntary martyr's journey, which may be interpreted in the category of sacrifice in the name of higher values.<sup>11</sup> The question about the possibility of making a conscious self-sacrifice is supplemented by another: how can we understand the "metaphysics of sacrifice"? The same difficulty is to name and describe something that transcends human thinking. We can say that metaphysics is a philosophical attempt to grasp what is the first and most important in reality; metaphysics is thinking in which the question about *arche* emerges.<sup>12</sup> We will try to demonstrate that the metaphysics of sacrifice has a cultural aspect. It builds a culture and civilization of love for another human being, which stands in stark contrast to the culture and civilization of death, in which terms such as sacrifice lose their meaning in favor of very often selfishly understood purpose of human life.

In our analyses, we will basically use the method of a broadly understood humanistic interpretation,<sup>13</sup> in which we take into account the values we experience, on top of the metaphysical and religious beliefs that co-determinate the choice of our heroines' life paths. This interpretation is given here to certain human activities, which on the one hand have

---

11 Speaking about the biography of Stein and Weil, it is impossible not to draw attention to their work, in which we can also find analysis on the issue of sacrifice. Cf. S. Weil, *Świadomość nadprzyrodzona*, Warszawa 1956; E. Stein, *Wiedza krzyża*, Kraków 2004.

12 Cf. K. Tarnowski, *Metafizyka w człowieku*, "Znak," Iss. 741, 2017.

13 Humanistic interpretation method was developed by Jerzy Kmita in his book *Z metodologicznych problemów interpretacji humanistycznej* [From the methodological problems of humanistic interpretation]. The book develops a project on the methodology of the humanities. In this project, Jerzy Kmita wanted to indicate what type of reasoning is used in the humanities. In his early works Kmita showed how humanistic interpretation takes place on examples taken from literature (e.g. the attitude of Antigone or the poetry of Leopold Staff). That humanistic interpretation would be consistent with our everyday intuitions which concern the interpretation of human behavior. It is common for each of us to assume that in order to understand the meaning of the other person's behavior, one must take into account his or her knowledge and axiological preferences. The scheme of humanistic interpretation takes up our colloquial intuitions, which we associate with the understanding of the meaning of human behavior. The humanistic interpretation, which is a certain type of reasoning, includes three conditions: a premise that says that a given entity has knowledge; a premise that says that the objectives and values preferred by the entity are achievable; and a premise that assumes the rationality of a given entity. Humanistic interpretation underwent a kind of an evolution in the Poznan school of philosophy. This has been done not only by Jerzy Kmita but also by his students. Some of them, such as Prof. Pałubicka continued and developed the epistemological variant of the humanistic interpretation. In contrast, Prof. Moraczewski and Prof. A. Grzegorzczak chose the phenomenological and hermeneutic variant. We can therefore see that humanistic interpretation was extended with newer components, which included various cultural, humanistic facts. In our interpretation we take the broad understanding which assimilates the phenomenology.

a culturally creative character, while on the other hand they present high moral values.<sup>14</sup>

## 2. Sacrifice as a supreme act of devotion

The category of “sacrifice” has numerous defining characteristics. We shall not recall them here, because that would take us away from the substance of the matter. Despite the differences in the understanding of sacrifice, it is undeniably a kind of death. There is a consensus among different theorists who differ in detail in their understanding of what sacrifice is. Many theories have been developed on the subject of death and attempts to understand it. In our discussion we will focus on discussing sacrifice as an act of giving one’s own life in the name of values. Let us therefore refer to the definition of sacrifice developed by the French philosopher Gabriel Marcel, who claimed that sacrifice for the other cannot be understood and explained in a rational way. He wrote:

To explain, we are looking for a goal, yet it is not possible to justify the sacrifice of life with a goal we would like to achieve. It is in the nature of sacrifice ... to be unable to give an account of oneself. In a purely human sense, it is madness, but at the same time the human being feels a moral compulsion not to retreat from it; he or she knows that if they had not made sacrifices, they would have humiliated themselves, so she or he has no choice. But sacrifice is not self-cancellation (like suicide), but the fullest affirmation and salvation of one’s existence.<sup>15</sup>

We must pay attention not only to the difficulty of talking about sacrifice due to the lack of clear definitions, but also to the fact of experiencing death which we have not been able to know empirically. Dedication of one’s own life is a deeply personal act. It is difficult to argue with such a free decision. The act of giving one’s own life in which another person was not saved may raise many doubts about the rightness of such behavior. In our analysis, we want to draw attention to the conditions that should be met by an act that could be classified as a sacrifice. These are:

1. in human nature there is a constant desire to stay alive, which does not mean that man is unable to sacrifice life in the name of ideas and values that they consider absolute. The who sacrifices

14 Cf. J. Kmita, *Z metodologicznych problemów interpretacji humanistycznej*, Warszawa 1971; cf. A. Grzegorzcyk, *Źródła sensu w humanistyce*, Kęty 2018.

15 I. Ziemiński, *Metafizyka śmierci*, Kraków 2010, p. 267.

themselves does not make it because of hating life or because of a death wish.<sup>16</sup> Someone who offers their life may even hate death and desire to continue to live, but when put in a situation where they have to make a choice, they prefer to die voluntarily.

2. death which takes the form of sacrifice involves not only the love and respect for life but also self-love.<sup>17</sup> As pointed out by Ireneusz Ziemiński a person who has a problem with accepting themselves will not be able to commit the absolute act of self-sacrifice. Their death would be a contradiction rather than a voluntary sacrifice. Self-hate and the desire for death would become a self-destructive act, which does not defend any value but denies their existence. Sacrifice is not an act which aims to destroy this life but an affirmation of the infinite meaning, in a way expressed fully by metaphysics.
3. it is also the most complete act of self-affirmation of a person who dedicates themselves in an absolute way, confirming their value. We can therefore conclude that death as a sacrifice is only possible if the person sees the value of themselves and their existence. Death, in which nothing is sacrificed, cannot be called a sacrifice.<sup>18</sup>
4. death, which takes the form of a sacrifice although it is related to altruism, can only become its false form, in which the only good and purpose of action is that of others.
5. also, when we consider an act of sacrifice that aims to externally manifest contempt for death, it becomes merely a caricature of sacrifice.<sup>19</sup>

We pointed out above that there are many examples that fit into the category of sacrifice, but in our discussion, we shall focus on its ultimate form that is sacrificing one's own life. We can reflect and seek answers to the question: what are the motives to take such action? Certainly, we are not able to point to a single transparent answer. We can assume that one of the factors is a metaphysical desire, which is always present in human nature. Human beings as finite creatures ask questions about their duties, the power of striving for good, which causes constant tension between absolutely finite experiences and infinite aspirations, and makes them search for ultimate meaning. This internal conflict cannot be resolved by itself. This forces man to constantly strive for something that is unexplored, to go

---

16 Such accusations are made towards the death of Simone Weil, recognizing her hunger for ritual suicide based on the model of the Cathars. Cf. M. Barber, *Katarzy*, Warszawa 2005.

17 Ana Rand argues with this view, showing that ethical selfishness and self-respect preclude an act of sacrifice. Cf. A. Rand, *Cnota egoizmu. Nowa koncepcja egoizmu*, Poznań 2000.

18 I. Ziemiński, *Metafizyka śmierci*, op. cit., p. 241.

19 Ibidem.

beyond what is earthly, sensual, and finished.<sup>20</sup> But this is not a death wish, which would help thus achieve the coveted infinity. The desire to realize the highest value, which is made present in the act of sacrifice is entered into the human nature, becoming the testimony of man striving to achieve a level of moral heroism. Absolute sacrifice has its own special character. It is not just giving up or dedication of a total of some parts, but the ending of one's own life. Such an act is of highest value. As a result of it, the person is not able to pursue other values, because their earthly life is radically ended. Human resignation from one value for another is also a kind of sacrifice, but sacrificing one's own life is total, absolute and final.<sup>21</sup> As stated by I. Ziemiński:

The sacrifice of life is also individual, acting act of free and mature person. A person who sacrifices themselves cannot only be part of a collective but must be an autonomous and morally responsible entity. They only give up theirs in the name of absolute values or people they want to remain faithful to.<sup>22</sup>

Sacrifice is an individual decision which is characterized by a voluntary act.<sup>23</sup> We cannot talk about sacrifice in the case of those who give up their lives only because of the influence of a group, or falsely understood

20 K. Śnieżyński, *Metafizyka dla człowieka a nie człowiek dla metafizyki: kilka uwag o potrzebie myślenia metafizycznego we współczesności*, in: *Wobec metafizyki: filozofia – sztuka – film*, Kraków 2012, p. 17

21 I. Ziemiński, *Metafizyka śmierci*, op. cit., p. 242.

22 Ibidem.

23 When talking about sacrifice, our greatest attention should be focused on its ethical aspect, which emphasizes that it is a conscious and motivated act. It should also be distinguished from the notion of renunciation or resignation, which may indirectly be associated with it. A sacrifice consists in refraining from realizing some possibility that man is able to realize. A person is only able to renounce what lies in his or her disposable abilities. Resignation, in turn, takes place when a person forced by external circumstances to renounce certain values, tendencies or desires, etc. Sacrifice is more than just renunciation or resignation. Sacrifice is associated with moral activity, or with restoring something that was previously neglected. It is characterized by deliberate action that goes beyond individual human dimension of the person making the sacrifice. When a person renounces an opportunity, gives up an important cause, sacrifices some goods for the benefit of others, and sometimes even their own life; all such actions, which are intended to benefit an individual or society, whether they are realized or not, can be called a sacrifice. A person making sacrifice sets out an aim to make a difference in the given reality, and in a broader context and also for the future. Sacrificial acts open up for individual or social purposes; without sacrifice, they would not be possible. Sacrifice results in a loss to the subject who undertakes it, but at the same time it is a benefit, a value, a higher purpose, which is realized by the sacrificial act. Cf. P. Schuttplez, *O kilku aspektach ofiary jako zjawisku moralnym*, "Acta Universitatis Lodziensis. Folia Philosophica," Iss. 1, Łódź 1981, pp. 44-45.

responsibility that arose as a consequence of social pressure. To make the absolute sacrifice, one cannot be forced by a warrant, law or moral obligation. Speaking of sacrifice, we must stress its other objective, which is the realization of the good that will be realized in this way. A person's death will only make sense if they die consciously and voluntarily gives their life up for someone, that is, for another person who is always "someone" and never "something." If someone gave his or her life for "something" it would be a misunderstanding resulting from wrongly selected values. It is also difficult to speak of a voluntary act of death that would not confirm faith in values without trying to defend them, without taking the side of the right cause or of the person who requires such sacrifice. It would be a rather absurd act of giving up one's life, which finds no lofty justification. The sacrifice of life has its justification not so much in the act of sacrifice itself, but phenomenologically it is most present in the idea of the cause which it defends with a certain amount of radicalism. This may not, however be a trivial matter. The cause should be worthy and deserving of the highest sacrifice. Otherwise giving one's life for a hybrid of a great cause is not only worthless, but a tragic mistake.<sup>24</sup>

The sacrifice of one's own life, which is guided by certain values, must be subject to the condition of realizing something good, such as saving somebody, and not only by choosing sacrifice, which is not backed by the realization of a specific value. We recognize that sacrifice makes sense only when it is given for another. Even dying in the name of patriotism, for one's country, always implies dying for one's brothers or sisters.<sup>25</sup> The reason why someone decides to make a sacrifice cannot be a negative value, such as avoiding evil. Self-sacrifice cannot be justified in a sense of pride, rebellion, honor, audacity or selfishness that takes on a negative form. It must be based on respect for the value of every human existence.<sup>26</sup> According to Ziemiński, "the act of sacrifice is therefore only possible on the grounds of metaphysical optimism, expressed through trust in the meaning of human life—one's own and others."<sup>27</sup> Another condition that is required for the category of sacrifice is seeing one's life as a value. The type of existence that is the realization of values gives the possibility and motivation to sacrifice oneself. Such a choice of death becomes an ultimate act and a complement to our life so far.<sup>28</sup> Voluntary death in an act of sacrifice

---

24 I. Ziemiński, *Metafizyka śmierci*, op. cit., p. 242.

25 Ibidem, p. 267.

26 Ibidem, p. 243.

27 Ibidem.

28 Sartre compares life to a series and sees death as its element, and each of the elements thus is always present in all the parts of this series. However, this way of recovering death does not

is being faithful to oneself and the professed values. It is certainly not an instrumental treatment of a person. By dying to save someone else's life, we become fully ourselves, and we deepen our humanity by responding to the momentous values that make a certain appeal to us to make them real in the real world. Such a sacrifice, in our opinion, does not expected to be repaid, recognized, or rewarded, even in the next life.<sup>29</sup> The self-sacrifice of one's own life in the hope of continued existence after death cannot fulfill the conditions for the existence of a sacrifice, since in this form it is only a manifestation of selfishness. By drawing attention to the conditions of sacrifice, we can pose the question: does every human death deserve to be called a sacrifice, even if it does not result in the evaluation of any human being? We will try to recall the most important events in the life of Edith Stein and Simone Weil and answer the question.

### 3. Edith Stein and Simone Weil—victims 20th century totalitarianisms?

Edith Stein and Simone Weil lived in the difficult times and witnessed the outbreaks of two World Wars. This experience left a stigma on their lives and influenced the moral stance they adopted. Both philosophers became heroines whose lives were marked by the stigma of the atrocity of war. Everyone has come a difficult way in search of the truth, which

---

make death something only human, it exists as something individually related to mankind, it becomes something mine. Through the externalized understanding of death, it gains its individual and personal dimension, and is no longer just a great unknown. Death becomes an inseparable phenomenon from a person's personal life, which means that both life and death are events assigned to a particular individual and cannot be repeated. Man thus also becomes fully responsible for their life as well as for death. However, this is not a responsibility for one's own death in an empirical sense, but it is a responsibility for a feature of finiteness and organicity that makes life and death one's own. Cf. J.P. Sartre, *Byt i nicosć*, Kraków 2007, pp. 650-652.

- 29 No prospect of eternal life allows for full dedication. Man who rejects eternal life does not calculate or expect that his act will be compensated. An example of such behavior is Simone Weil, who rejected the Christian understanding of eternal life. Weil criticized Christianity, which itself urged one to make to selfless self-sacrifice in imitation of Christ, which excluded the desire to preserve one's life. The thinker understands the cross as an acceptance of voluntary suffering without the prospect of eternal life. Cf. I. Ziemiński, *Życie wieczne. Przyczynek do eschatologii filozoficznej*, Kraków 2013, p. 76. As she herself stressed in her writings, her encounter with the Christian religion was hampered by her dogmas, which she radically rejected, as well as her faith in eternal life. The philosopher thought that the Passion and death of Jesus on the Cross would be enough for her in understanding and accepting Christianity; as in them and through them she would find the truth of Christ. Cf. S. Weil, *Lettre a un religieux*, Paris 1999.



was not only a philosophical construct, but an existential matter. Despite their Judaic roots, each of them comes out of agnosticism and then turns to a philosophy that opens the way to a more complete experience of the truth of Christianity. However, their lives were not only a search for truth. They were also filled with the experience of pain, suffering and despair,<sup>30</sup> which they accepted in their voluntary act and even treated them as their moral duty: Weil feeling obliged for the working class and France, Stein for Jews, Christians and Germany. Talking about them, we may experience both admiration and resentment and formulate questions about the desirability of their behavior. In our analysis, we will try to present only those factors that influenced the act of self-sacrifice by both women. We shall reconstruct certain conditions regarding their knowledge of the world and shared values. We will take into account the experience of existential philosophy and the impact of conversion to Christianity, which made them adopt the attitude the realization of which was sacrificing their lives. Then we point to analogies and differences in the type of sacrifice that each philosopher adopted, and we discuss the rightness of their actions. A widely applied humanistic interpretation that takes into account phenomenological and hermeneutical issues allows for a more complete picture of the sacrifice of their lives and the axiological quality that has been made present in their deeds.<sup>31</sup>

---

30 “Simone Weil et Edith Stein, toutes deux en des voies différentes, ont connu dans leur chair et leur esprit la morsure de la souffrance. Edith Stein reste discrète et ne parlera jamais directement de sa propre souffrance. Simone Weil se confie plus volontiers dans les pages de son journal, ou dans sa correspondance” (Both Simone Weil and Edith Stein experienced suffering in different ways. Edith Stein remains discreet and never talks about her suffering in a direct way. Simone Weil voluntarily opens about her experience in her notes or correspondence), own translation. Cf. J.F. Thomas, *Simone Weil et Edith Stein. Malheur et souffrance*, Namur 1992, p. 8.

31 In our work, we have assumed that what Simone Weil and Edith Stein did making a sacrifice of her own lives were rational acts, i.e., it was consistently carried out on the basis of their knowledge and values held. Of course, one has to remember that people are not so much rational as they have a certain tendency to act rationally. Actually, you could say that Simone Weil and E. Stein showed a certain tendency to act in a real way, realizing the goals they preferred the most. It can be said that both women were subjects of their culture, and their decisions were determined by the history and culture in which they lived. In this article, we assume that their actions showed a tendency to rational behavior, but then someone else might interpret it differently. After all, based on e.g. on the biography of S. Weil and the available facts, one could have come to the conclusion that she behaved in an irrational way, e.g. by refusing to accept meals, going to war in Spain despite her poor health or by taking up the hardest physical work. Her act could not be classified as an act of sacrifice, but as a suicide. It seems that in order to grasp the specificity of human rationality we need not only formal criteria but we also need to broaden the humanistic interpretation with the components of hermeneutical and phenomenological methods. In the article we propose such an extended concept of interpretation showing that the

### 3.1. Edith Stein

Edith Stein, one of the twentieth century women thinkers has fascinated many. The life and scientific work of this Husserl disciple are a testimony to her consistent decisions guided by the search for truth. This unusual woman was characterized by Roman Ingarden:

Edith Stein was a very gifted person, serious and responsible. I have always seen her as a pure person, with inner wealth and seriousness, who can be trusted in everything. She chose her philosophical and scientific path, and then her religious path consciously and felt truly happy about it, although in her private life she did not experience what she deserved.<sup>32</sup>

Edith Stein (12.10.1891 – ca. 9.08.1942) grew up in a Jewish family, where she was brought up in the spirit of Judaism. Despite this, at the age of fourteen he suffered a deep existential crisis and adopted an atheistic attitude. Since early childhood, she showed great interest in science and an unusual disposition. She writes about it in her diary:

in my dreams I always saw a bright future. I dreamed of happiness and fame, because I was convinced that I was made for great things, and that the close relations between the small bourgeoisie among whom I was born, did not concern me at all ...<sup>33</sup>

After completing her studies at the University of Wrocław she went to Göttingen to take up studies in philosophy under the supervision of Edmund Husserl. During these studies, in addition to learning phenomenology, she also experienced an encounter with the Christian religion. During this time, many students of phenomenology experienced acts of conversion, which certainly affected Stein as well.<sup>34</sup> Her studies in Göttingen

---

Weil and Stein's deed manifested, in the phenomenological sense, metaphysical qualities, being a correlate of human metaphysical desire.

32 E. Stein, *Pisma*, Vol. II, transl. I. Adamska, Kraków 1982. p. 10

33 E. Stein, *Dzieje pewnej żydowskiej rodziny*, transl. I. Adamska, Kraków 2005, p. 91.

34 We can at this point talk about a significant influence of Max Scheller on the future attitude of Stein: "he spoke about [Stein writes] life's issues which are important for every man and which move the hearts of young people ... I do not know in what year he returned to the Catholic Church. Probably, it was not very long ago. In any case, it was the time in which he dealt mainly with Catholic thought. He was able to convince her with the light of his spirit and the power of his persuasion," W. Herbstrith, *Edyta Stein. Żydówka i chrześcijanka*, Kraków 2008, p. 48. Another person who had a great influence on Stein was Adolf Reinach, Husserl's assistant, who converted to Evangelism during World War I. At that time, the young philosopher fell into a crisis caused by problems with selecting material for her doctoral thesis. Stein's mental

were interrupted by the outbreak of World War I. Consequently, Stein was forced to return to Wrocław. Most of her male friends go to the front and she also enrolls to serve in the Red Cross to join the fight on the war front. Because of illness, however, she is discharged from her duties and forced to return to Göttingen. The time spent on the front affects her understanding and sheds new insights into the Christian faith. As she wrote “sometimes with my friends go to the Protestant church. But I have not yet found my way to God.”<sup>35</sup>

In 1915, guided by a sense of solidarity with her friends fighting in the war, she decides to stop her resumed studies and goes back to the front as a nurse. Her attitude is recalled by Roman Ingarden:

she went through the whole war with the attitude of someone who is ready to start a one-man campaign at any time ... She sent me letter after letter asking if I had the right to waste my time on philosophy and other such nonsense when people who I could help were dying there.<sup>36</sup>

In 1917, Reinach died, whose death led Stein to a breakdown. In this period, she also had the first religious experience, which then directed her towards conversion. In 1920 she visited her friends Theodora and Hedwig Conrad-Marius. During this stay, Edith accidentally comes across the *Life of Teresa of Jesus* by St. Teresa of Ávila. The reading of the autobiography of the saint finally influenced her decision to move towards Christianity. She wrote: “I reached for the book at random. It was titled: *The Life of Teresa of Jesus written by herself*. I began to read. I was fascinated! I read it in one breath to the end. When I closed it, I told myself: this is the truth,”<sup>37</sup> we read in the memoirs of Edith Stein. The influence of reading the Spanish mystic led Stein to experiencing a new truth. Hedwig Conrad-Martius mentions that her friend was an internally closed person and that the matter of her conversion was defined by the words *Secretum meum mihi*.<sup>38</sup> After this event, Edith studied the Catechism and the Roman Missal avidly. After getting acquainted with the elements of the doctrine of the Christian faith, she attended mass for the first time and asked for a baptism. After the preparations, Edith was given the sacrament of Baptism on 1 January 1922

---

state was so serious that in moments of doubt she thought of death and even suicide attempts. Reinach led her out of this existential crisis. Cf. E. Stein, *Światłość w ciemności*, Kraków 1977, p. 137.

35 W. Herbstrith, *Edyta Stein. Żydówka i chrześcijanka*, op. cit., p. 56.

36 F.M. Oben, *Życie i dzieło św. Edyty Stein*, Gdańsk 2006, p. 21.

37 E. Stein, *Światłość w ciemności*, op. cit., pp. 202-203.

38 H. Conrad-Martius, *Moja przyjaciółka Edyta Stein*, in: *Edyta Stein albo filozofia i krzyż*, Kraków 1989, p. 3.

in Bergzabern. The godmother was her friend Hedwig. On the same day the future Carmelite received the sacrament of Holy Communion and the sacrament of Confirmation on February 2nd.

The conversion not only changed Stein's view of faith and religion, but also led to her a new understanding of philosophy.<sup>39</sup> The adoption of Christianity had an impact on Stein's further life as she abandoned her university career and decided to join the Carmelite Order in Cologne taking the name of Teresa Benedict of the Cross. The Carmelite's religious life was again interrupted with the outbreak of World War II, when mass persecution and extermination of Jews began. Aware of the situation in Germany, in self-reflection Stein compared herself to the Old Testament's Queen Esther. Like Esther, she wanted to sacrifice herself for her nation. She experienced her vision of future of martyrdom in solidarity with the people of Israel. She expressed this premonition of this future destiny: "I am convinced that God does not call anyone for himself and that is an evidence of spontaneous love, when He accepts someone's life."<sup>40</sup> On 9 June 1939 Sr. Teresa Benedict of the Cross wrote her will, in which she stated:

Even now I joyfully accept the death that God has predestined me, in full submission to His Most Holy Will. I ask the Lord to accept my life and death in His honor and glory, in all the intentions of the Sacred Heart of Jesus and Mary, for the holy Church, and especially for the preservation, sanctification and perfection of our holy Order, in particular the Cologne Carmel and the Carmel in Echt, to the satisfaction of the unbelief of the Jewish people, that the Lord may be accepted by His own and His Kingdom come in glory, for saving Germany and for peace in the world, and finally for my loved ones, living and dead, and for all whom God has given me: that none of them may perish.<sup>41</sup>

In these words, Edith Stein predicts her death, which will later take the form of the sacrifice of her life of the Jewish people and Germany. In a way,

39 Cf. A. Grzegorzczak, *Wpływ myśli E. Stein na filozofię przelomu wieków*, in: *Bóg i Auschwitz. O Edycie Stein, wizycie Benedykta XVI i Bogu w mrokach dziejów*, eds. M. Deselaers, L. Łysiń, J. Nowak, Kraków 2007. Cf. R. Guilead, *De la phenomenologie a la science de la croix*, Paris 1974, p. 231. The author emphasizes the fact that Stein goes beyond the thought systems of Husserl or Heidegger in her philosophical concept. She stresses the existence of God in human thought, which would displace some philosophers. The thinker claims that human thought without reference to God is not able to answer questions related to the concept of nothingness or elusiveness.

40 M. Titaniec, *Pobłogosławiona przez krzyż*, in: *Szukając mistrza. Lubinieckie ślady św. Teresy Benedykty od Krzyża Edyty Stein*, Vol. I, ed. A. Pytlik, Lubliniec 2008, p. 47.

41 E. Stein, *Dzieje pewnej żydowskiej rodziny*, op. cit., p. 578.

she takes the sin of the Jews' disbelief in Jesus on herself while showing that Christianity is a complement to Judaism:

Your people, Lord, thy Israel  
I take deep into my own heart.  
Praying in secret and burning as sacrifice,  
I desire to bring it to the Heart of the Savior.<sup>42</sup>

In 1938, faced with increasing persecution of the Jewish population, Stein was transferred to the Dutch convent at Echt. There, in 1942, she was arrested by the Gestapo, together with her sister Rosa. It was then that she is believed to have said the significant words: "Come, let's die for our people."<sup>43</sup> The alleged likelihood of saving her life by fleeing to Switzerland remains a contentious issue to this day. During his lecture in Krakow in 1968, Roman Ingarden mentioned this incident: "Don't you know? She was a Prussian woman, she reported herself when the order came out how the German subjects should surrender."<sup>44</sup> However, some researchers point out that Ingarden did not have accurate information on the last months of Stein's life, so it is important to exercise due restraint in evaluating the information he provides. Death of Edith Stein and her sister Rosa probably occurred on 9 August 1942 in a gas chamber of Auschwitz.

### 3.2. Simone Weil

Simone Weil appears to us primarily as a philosopher and social activist. Her philosophical thought was a thorough analysis of the events of the twentieth century, in which she felt the inevitability of war and its future effects. She has always aroused controversy and disputes. Some believe that her views are heretical in nature, others that they express the attitude of holiness. Without a doubt, Weil was full of contrasts. Certainly, with her thought and attitude she was ahead of her times and she has left a mark on the consciousness of the next generations that are pondering her reflections. In spite of a broad and in-depth analysis of reality, interpersonal relations, politics, and religion she never developed a single clear philosophical path, which, however, does not prove her intellectual negligence, but, on the contrary, in this case, it is the evidence of her huge erudition. The

---

42 E. Stein, *Światłość w ciemności*, op. cit., p. 282.

43 E. Stein, *Dzieje pewnej żydowskiej rodziny*, op. cit., p. 575; R. Ingarden in: E. Stein, *O zagadnieniu uczucia*, Kraków 1988, p. 165.

44 Ibidem, p. 161.

philosopher's writings do not provide clear answers, putting the reader in doubt about his or her own existence, faith and love for the neighbor, to whom the author gave herself away without any limits. Weil's life is not just about practicing philosophy, it is about political, social and spiritual engagement. Her philosophical thought does not fit in any of the academic trends. Philosophy was for Weil a life path that she consistently followed, as ancient thinkers did.

The French philosopher was born on 3 February 1909 in Paris. She came from an assimilated Jewish family and was raised in an atmosphere of agnosticism. She received a solid education in one of the best high schools in Paris and then studied philosophy with passion and commitment with her master Emil Chartier. After graduating from Ecole Normale Supérieure, she worked as a Greek language and philosophy teacher. In 1934 she abandoned her work as an educator and became employed as a factory worker in the Renault and Alsthom in Paris. In 1935 she went to Spain, to take part in the Civil War as a nurse. She did not learn about her Jewish origins until 1940, after the defeat of France, when regulations concerning repression of Jews were issued. As a Jew, she confessed Christianity but without receiving the sacrament of baptism. She always considered herself "a disciple of Christ outside the Church." The year 1940, when she first saw a procession of women praying for her dead husbands during her stay in Portugal, was the point at which she saw her religious turn. Of course, this is one of the many ways of interpretation and explanation that speaks of the motives behind S. Weil's turn to Christ. But we cannot consider this interpretation to be absolutely certain. Despite her growing fascination with Christianity she refused to accept the sacrament of baptism. As she wrote: "However, in recent years this has been denied by her close friend Simone Deitz, who at Weil's request baptized her in the last months before she died."<sup>45</sup> In 1942, she went through Algeria to the United States and then to London. There she made contact with the Committee of Free France. When it turned out that it was impossible to return to France, she had a breakdown and fell into despair. Due to rapidly developing tuberculosis, she was taken to the Ashford sanatorium. In 1943 she died far from home at the age of thirty-four.

The life of the French philosopher was a path of courageous decisions and consistent implementation in action. One of them was the sacrifice she made of herself, refusing to accept meals in order to join in solidarity with the hungry workers. Czesław Miłosz wrote about her:

---

45 J.A. Kłoczowski, *Simone Weil w sporze z personalizmem*, in: *W kręgu inspiracji personalizmu tytynego. Ślipko – Tischner – Styczeń*, ed. P. Duchliński, Kraków 2012, p. 147.

Simone Weil was one of the greatest figures which the deadly twentieth century gave to humanity. However, she was an unbelievable, unexpected and respectable character, and at the same time one that provokes opposition. Perhaps every genius imposes such contradictory feelings on people, although this is not certain. Simone Weil eludes all attempts at hagiographic embellishment, she shocks with her scandalously “deadly” behavior, makes us ask questions: why, why did she have to appear in this and not another era of Christianity?<sup>46</sup>

#### 4. Metaphysical and culture-making nature of sacrifice

When we consider the question of sacrifice in Simone Weil and Edith Stein, we ask a question here about the advisability of human death in the name of the values and ideas we profess, in addition to whether the death of both philosophers deserves to be called sacrifice. The biographies of both recalled philosophers show a number of facts and events that may confirm their deaths as self-sacrifice. The existence of both women also has a lasting reference in the experience of conversion, which had an impact on both life and death in both cases. Their sacrifice was the kind of dying that modeled Christ’s suffering on the Cross. We have shown many of the conditions of sacrifice-making that emphasized its voluntariness and the main condition that is the realization of a greater good. We have shown above some necessary conditions to count giving one’s life as a sacrificial act. None of the philosophers really saved the life of another person with their attitudes. Although this condition is not met, we can conclude that the women’s deaths were absolute sacrifices because of the value of the cause to which they sacrificed their young lives. Each of the women showed a strong commitment to help those in need and manifested acts of profound patriotism from their early adolescent years. The contact with Christianity not only changed the two philosophers’ perceptions of philosophy as a science, but also resulted in a profound existential experience. In her reflections, Stein points out that man is not able to lead a temporal life without “anchoring” themselves in eternity. The turn towards the Catholic faith resulted in Stein’s mystical experience, which is connected with suffering as an inseparable act. This suffering is voluntary but its experience is a way that leads one to knowledge of God. The suffering Stein writes about is also her existential experience, and it is this

---

46 Cz. Miłosz, in: S. Weil, *Wybór pism*, Kraków 1991, p. 6.

that guides her on the path of sacrifice. This type of sacrifice refers to the Christian message of God's love, who, crossing all boundaries, gave His life for the salvation of humanity.<sup>47</sup> Unlike Stein, according to the interpretation adopted here, Weil rejected the possibility of eternal life, which made her sacrifice her life for service and giving it in an act of solidarity with suffering workers without having a promise of continued existence that she considered unacceptable. In the face of the sacrifice adopted by the French philosopher we can discuss and formulate questions: was her death a ritual suicide she was aiming for or not? We believe that this interpretation is wrong not only because of her rejection of the possibility of eternal life, but also because of her biography. Analyzing the life of the thinker, we see that her desire to die was rather an expression of despair at the impossibility of continuing the fight for her homeland than a desire to die for the sake of dying, which is completely unjustified.

In order to make the metaphysical sense of sacrifice even more evident, we will refer in our further interpretation to the concept of metaphysical quality, which Roman Ingarden used in his work on the literary work. It seems that the notion of "metaphysical qualities" can play a certain heuristic role by providing us with a convenient tool for understanding the nature of sacrifice and its metaphysical sense, which constitutes a desire for transcendence. The philosopher characterizes these qualities as follows

there are particularly simple or derived qualities such as sublimity (of someone's sacrifice) or vileness (of someone's betrayal), tragedy (of someone's defeat) or horror (of someone's fate), what is shocking, incomprehensible or mysterious, demonism (of someone's act or a person's), holiness (of someone's life) or the opposite of it: sinfulness or "hellishness" (e.g. of someone's revenge), ecstasity (of the highest delight) or silence (of the ultimate relief), etc. ... These qualities are not properties of certain objects in the normal sense of the word, nor are they properties of these or these mental states, but they usually manifest themselves in complex and often different life situations or interpersonal events, as if some special atmosphere, floating above them, surrounding things and people participating in these situations, an atmosphere that permeates everything and illuminated everything with its light.<sup>48</sup>

As Władysław Stróżewski emphasizes, metaphysical qualities rarely appear during human life. However, when it comes to their manifestation, they are able to give it a new, deeper meaning, while at the same time evoking a desire and a sense of longing for them. The revelation of

47 A. Grzegorzczak, *Wpływ myśli E. Stein na filozofię przelomu*, op. cit., p. 13.

48 R. Ingarden, *O dziele literackim*, Warszawa 1960, p. 368.



metaphysical quality is both the pinnacle of our life and reaches its depths and everything that exists.<sup>49</sup> Metaphysical quality is always a certain value, which refers to our everyday life, but we are not able to give it a concrete form because it escapes rational cognition. As pointed out by Ingarden: "...you can only see them directly, one would like to say, as if in ecstasy, on the basis of certain situations in which they come into being."<sup>50</sup>

Referring to Ingarden's words, we can state that metaphysical qualities cannot be captured by empirical cognition. The Polish phenomenologist limits the experience of metaphysical quality only to works of art, i.e. to the world of intentional awareness. It seems, however, that nothing stands in the way of assuming that metaphysical qualities are also present in the conditions of the real world, namely, in the act of sacrifice. We can pose the question: how are we able to recognize these qualities? Is it only our intuition? Are we able to capture quality in a different way? Metaphysical qualities are perceptible to man, and they reveal the hidden meaning of being and life and constitute it. Ingarden emphasized that in dealing with them one enters the source of existence. The subjective correlate for metaphysical qualities is desire, from which flows the intuition that captures the presence of the qualities presented. Desire is a form of experiencing a certain lack of good that comes from the source of all existence and is made present through these metaphysical qualities, forming an axiological and normative order.

In the adopted interpretation, metaphysical qualities refer to the ultimate source of being, which is the ultimate meaning understood as the God of the Christian religion. The sacrifices of Weil and Stein also reveal the momentous metaphysical qualities of moral heroism, which is justified by reference to this ultimate meaning. Besides heroism, other qualities such as sublimity, holiness, tragedy, but also silence, which, in the face of the experience of sacrifice, takes words away and condemns us to silence, are revealed. The metaphysical quality is at the same time an axiological quality, having a momentous and obliging character. It calls for specific actions that make its sense real in the real world. Ingarden writes:

For it shows not only what is covered and mysterious for us in other conditions, and only becomes open and visible in them, but they themselves are what lies at the source of being and are one of its forms. But they can only fully reveal themselves to us if they become a reality.<sup>51</sup>

---

49 W. Stróżewski, *Jakości metafizyczne*, in: *Od teorii literatury do ontologii świata*, eds. A. Perzanowski, J. Pietruszczak, Toruń 2003, p. 81.

50 R. Ingarden, cited in: W. Stróżewski, *Jakości metafizyczne*, op. cit., p. 82.

51 Ibidem.

Metaphysical qualities are directly present in the sacrifice by a person who gives up their life in the name of a higher supernatural order. To perceive the metaphysical quality of sacrifice it requires, on the one hand, a certain ability to intuitively capture it, and on the other hand, a certain interpretation, which must be closely correlated with this intuition. But it is not easy to see this quality. It requires a certain openness and commitment from the subject. It demands the awakening of a metaphysical desire directed at the source of the ultimate meaning. After all, the subject must also have a certain ability to see this present quality, which is very often obscured by the various cultural ideals and stereotypes in circulation today. From the phenomenological point of view, the appearance of metaphysical quality evokes something of an initial emotion. This emotion knocks us out of the daily rhythm of life, often triggering extreme tendencies from compassion and solidarity with the victim to its radical rejection or denial. In order to experience this quality of sublimity of sacrifice, which after all is always intertwined with tragedy, which causes repulsions in us, as one needs to be prepared for everything. It can be stated that in the act of sacrifice, in fact, a source of meaningfulness of all praise opens before us. Sacrifice reveals the infinite dimension of transcendence, it makes something from outside the empirical world present, forcing us to exceed our contingent needs. It is a trampoline enabling a jump into the source of all existence. It arouses a desire for the Infinite Good in us, which by making itself present challenges the temporary symmetrical axiological order.

The question posed at the beginning of our deliberations has not only become a question of the individual conduct of each person, but also of his or her death, which is not only an inevitable act, but also permanently connected with our existence. Considering the problem of worldly life, we can notice that the value of our life is permanently connected with the moment of death. We referred to the examples of Stein and Weil's deaths, which were not only acts of heroic courage but also posed questions about the metaphysics of our death. Are we able to think today about the metaphysics of death, which is permanently connected with living our lives? We may also ask about the character and the way we should live out our temporal life: is it just a time given to us here and now, or is it followed by something else? Another question which this reflection requires is the ability of man to perceive metaphysical qualities. Can we talk about a crisis that made us lose this ability today? We can try to find answers to these questions in the technological development and an ever-stronger belief in pragmatic values that displace metaphysics. These reflections have raised a number of questions which we are not able to answer in an unambiguous way, but only to consider them as a contribution to the continuation of such reflections. The example of women who have made a conscious

sacrifice in the name of their values and their compassion and duty towards another person shows that metaphysical desire can be considered by the category of sacrifice. Both philosophers, in the attitude they adopted, have committed a superordinate act<sup>52</sup> in which the metaphysical quality of heroism became a reality. This deed arose from the desire to metaphysically realize good in a world marked by different structures of evil. The example of both women shows that despite the alleged crisis of great narratives in culture, we can still talk not only about metaphysical desire but also about the existence of momentous metaphysical values. We can state that the examples of the philosophers confirm not only the need for metaphysical thinking but also the direct experience which it was expressed in absolute sacrifice. The example of absolute sacrifice leads us to conclude that the way to the renaissance of metaphysics in contemporary culture is to restore the ability to experience the metaphysical qualities that are present in various border situations, and undoubtedly the act of sacrifice is such a border situation. In this way, sacrifice as a super-supererogatory act, which is correlated with the desire to make a higher good a reality, has a culturally creative capacity; it creates a certain elite culture of heroism which, in spite of modern times, in which egoism seems to be dominant, underlines the value of sacrifice for another person. The culture of holiness of life is a culture of moral heroism to which every person is invited. This invitation is not a coercion, an order, but rather an offer and an appeal that we can use or deny without any moral consequences. We can ask whether contemporary culture is able to function without the moral values of heroism? Does the development of culture not require something more than what we can see and touch? It seems that a culture in which higher values are not present is doomed to destruction. As has been stated, man has a natural desire to be directed towards something that exceeds his natural cognitive capabilities. Man is looking for meaning, which cannot be closed in the area of the empirical. Sight and touch must be directed towards the ultimate horizon of desire, from which comes the absolute Good.

---

52 The category of supererogation concerns an act in which human action goes beyond one's duties. It mainly refers to the moral actions of man in which his conduct has not only an altruistic dimension but also goes beyond obligations. Trying to identify a general definition of the concept supererogation we can provide: "Supererogation is action beyond what we call duty. Fulfilling acts of supererogation is a good thing, but not required; failure to do them is not morally wrong. According to some theories, supererogation is not possible. Most utilitarians (consequentialists) maintain that it is our duty to act in the best way. Any other action is contrary with duty, and therefore it is a moral evil. Kant also recognizes the obligation in such a way as to eliminate the possibility of supererogation," A.M. Kaniowski, *Supererogacja. Zagubiony wymiar etyki*, Warszawa 1999, pp. 19-20.

## 5. Recapitulation

The two women's decisions to sacrifice of their lives were influenced by many factors and existential experiences. Voluntary sacrifice of one's own life may be subject to criticism. For it is always possible to ask the about the purposefulness of Weil and Stein's deeds, neither saved another person's life. However, the heroic deaths of both women direct our attention to another problem, which is the voluntary acceptance of death in the name of high moral ideals and values. Both Weil and Stein lived in a time of great value crisis caused by the disaster of two world wars. Today, we are also in crisis, although it manifests itself in a different way and is characterized by consumption and technocracy. We can reiterate the questions formulated at the beginning: is there an idea in today's culture that would be the reason for the ultimate sacrifice? We think we can answer in the affirmative, despite the alleged discussion about the crisis of axiology and metaphysics. The examples of S. Weil and E. Stein confirm our thesis about the impossibility to remove metaphysics from contemporary culture. This metaphysics is present precisely in sacrificial acts, in which life is sacrificed for the other person, who always comes to us with a face on which joy but also pain and suffering from entanglement in various structures of evil is painted. The absolute sacrifice made by the subjects of our analyses goes towards the invisible, exceeding the worldly good that calls for realization in the real world. This can only be done by a free entity that decides on its existence. We can say that the act of sacrificing one's own life is certainly a direction towards radical metaphysics that will not find easy recognition and understanding for among the contemporary audience, as we are aware. In the end, the very act of sacrifice is a mystery before which human reason must capitulate. Sometimes, however, it capitulates too early without giving a chance for a deeper understanding of the meaning that is present in the sacrifice, and this is because man is deluded by various pragmatic and utilitarian idols that divert his gaze from the absolute and direct his gaze towards the mundane and tangible, which can be easily seen and used in practice. We emphasize that such a supererogatory act is the creative ferment of the culture of moral heroism, which is the culture of life, that radically opposes contemporary Western culture, which is increasingly taking on the face of the culture of death, in which the value of the other person is not a correlate of desire but of psychological and biological needs. A human being has a value when he or she can satisfy their functional, instrumental, etc. needs. The sacrificial act has not only a culturally creative but also metaphysical-creative value. It makes the so-called metaphysical qualities present, in which we can touch the origins of all real and not merely intentional existence. These metaphysical qualities are a correlate

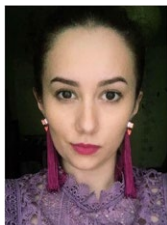
of our basic metaphysical desires, which cannot be translated into needs. It is their experience that leads them to undertake heroic acts exceeding the symmetry of the normative orders established by man. If Stein and Weil had only been driven by needs in their lives, they would probably never have been able to do such heroic things. However, they were motivated, according to our interpretation, by metaphysical qualities that come from a different order of being and open us to the infinite horizon of Good. The examples of Weil and Stein are primarily intended to stimulate our metaphysical imagination to think beyond what we can touch and see. Our point is to change our attitude towards the various sacrifices that actually happen every day. In order not only to look at them from a legal or psychological point of view, but to be able to see a much deeper meaning in them, which shapes our sensitivity to the life of another human being, as Tischner said, entangled in the maize of good and evil. The metaphysical meaning of sacrifice is that it allows us to see and, as it were, understand the meaning of our life more fully, which is not limited only to this world and to the realization of the needs resulting from its experience. Sacrifice reveals to us the perspective of the ultimate meaning, which is a correlate of our desire being born in the depths of our soul. The presented deliberations do not, of course, exhaust the outlined problem situation referring to the state of metaphysics and the condition of contemporary culture. Rather, they are a modest contribution to further research on the condition of contemporary culture and humanities, which is experiencing a hunger for the presence of high ethical and religious values. Our discussion about self-sacrifice can be concluded with a fragment of the poem by Zbigniew Herbert, *The power of taste*:

It did not require great character at all  
we had a shred of necessary courage  
but fundamentally it was a matter of taste  
Yes taste  
that commands us to get out, to make a wry face, draw out a sneer  
even if for this the precious capital of the body,  
the head—must fall.

## BIBLIOGRAPHY

- Barber M., *Katarzy*, Państwowy Instytut Wydawniczy, Warszawa 2005.
- Bauman Z., *Kultura jako praxis*, Wydawnictwo Naukowe PWN, Warszawa 2012.
- Benedict R., *Wzory kultury*, Muza, Warszawa 2002.
- Breczko J., *Zanik uczuć metafizycznych jako przyczyna kryzysu kultury*, "Kultura i Wartości," 2005, Iss. 13.
- Conrad-Martius H., *Moja przyjaciółka Edyta Stein*, in: *Edyta Stein albo filozofia i krzyż*, Kraków 1989.
- Grzegorzczak A., *Źródła sensu w humanistyce*, Marek Derwiecki, Kęty 2018.
- Grzegorzczak A., *Wpływ myśli E. Stein na filozofię przelomu wieków*, in: *Bóg i Auschwitz. O Edycie Stein, wizycie Benedykta XVI i Bogu w mrokach dziejów*, eds. M. Deselaers, L. Łysiń, J. Nowak, UNUM Centrum Modlitwy i Dialogu w Oświęcimiu, Kraków 2007.
- Guliead R., *De la phénoménologie à la science de la croix*, Beatrice Nauwelearts, Paris 1974.
- Gruchola M., *Kultura w ujęciu socjologicznym*, "Roczniki Kulturoznawcze," 2010, Vol. 10.
- Heidegger M., *Przewyciężenie metafizyki*, in: idem, *Odczyty i rozprawy*, Aletheia, Warszawa 2007, pp. 65-89.
- Herbristh W., *Edyta Stein. Żydówka i chrześcijanka*, eSpe, Kraków 2008.
- Ingarden R., *O dziele literackim*, PWN, Warszawa 1960.
- Jusiak J., *Myślenie metafizyczne i niemetafizyczne*, "Przegląd Filozoficzny," 1994, 2.
- Kaniowski A.M., *Supererogacja. Zagubiony wymiar etyki*, Warszawa 1999.
- Kłoczowski J.A., *Simone Weil w sporze z personalizmem*, in: *W kręgu inspiracji personalizmu etycznego. Ślipko – Tischner – Styczeń*, ed. P. Duchliński, Wydawnictwo WAM, Kraków 2012.
- Kłoskowska A., *Kultura masowa. Krytyka i obrona*, PWN, Warszawa 1964.
- Kłoskowska A., *Socjologia kultury*, Wydawnictwo Naukowe PWN, Warszawa 2007.
- Kmita J., *Z metodologicznych problemów interpretacji humanistycznej*, PWN, Warszawa 1971.
- Levinas E., *Trudna wolność. Eseje o judaizmie*, Atext, Warszawa 1991.
- Miłosz Cz., *Wybór pism*, Znak, Kraków 1991.
- Musil R., *Człowiek bez właściwości*, Vol. I, Porozumienie Wydawców, Warszawa 1971.
- Oben F., *Życie i dzieło św. Edyty Stein*, EXTER, Gdańsk 2006.
- Petrement S., *La vie de Simone Weil*, Gallimard, Paris 2004.
- Rand A., *Cnota egoizmu. Nowa koncepcja egoizmu*, Zysk i S-ka, Poznań 2000.
- Sartre J.-P., *Byt i nicość*, Zielona Sowa, Kraków 2007.
- Schuttplez P., *O kilku aspektach ofiary jako zjawisku moralnym*, "Acta Universitatis Lodziensis. Folia Philosophica," 1981, 1, pp. 44-45.
- Simmel G., *Filozofia kultury*, Znak, Kraków 2007.

- Stein E., *Dzieje pewnej żydowskiej rodziny*, Wydawnictwo Karmelitów Bosych, Kraków 2005.
- Stein E., *O zagadnieniu uczucia*, Znak, Kraków 1988.
- Stein E., *Pisma*, Vol. II, Wydawnictwo Karmelitów Bosych, Kraków 1982.
- Stein E., *Światłość w ciemności*, Wydawnictwo Karmelitów Bosych, Kraków 1977.
- Stein E., *Wiedza krzyża*, Wydawnictwo Karmelitów Bosych, Kraków 2004.
- Stróżewski W., *Jakości metafizyczne*, in: *Od teorii literatury do ontologii świata*, eds. J. Perzanowski, A. Pietruszczak, Uniwersytet Mikołaja Kopernika, Toruń 2003.
- Śnieżyński K., *Filozofia sensu jako odpowiedź na kryzys metafizyki. W stronę nowej „filozofii pierwszej”*, „Poznańskie Studia Teologiczne,” 2008, Vol. 22, 215.
- Śnieżyński K., *Metafizyka dla człowieka a nie człowiek dla metafizyki: kilka uwag o potrzebie myślenia metafizycznego we współczesności*, in: *Wobec metafizyki: filozofia – sztuka – film*, eds. U. Tes, A. Gielarowski, Wydawnictwo WAM, Kraków 2012.
- Tarnowski K., *Człowiek i transcendencja*, Znak, Kraków 1995.
- Tarnowski K., *Metafizyka w człowieku*, „Znak,” 2017, 741.
- Thomas J.-F., *Simone Weil et Edith Stein. Malheur et souffrance*, Culture et verité, Namur 1999.
- Tischner J., *Myślenie w żywiole piękna*, Znak, Kraków 2013.
- Titaniec M., *Pobłogosławiona przez krzyż*, in: *Szukając mistrza*, in: *Lublinieckie ślady św. Teresy Benedykty od Krzyża Edyty Stein*, Vol. I, ed. A. Pyttlik, Towarzystwo im. Edyty Stein, Lubliniec 2008.
- Weil S., *Lettre a un religieux*, Gallimard, Paris 1999.
- Weil S., *Świadomość nadprzyrodzona*, PAX, Warszawa 1956.
- Ziemiński I., *Metafizyka śmierci*, Wydawnictwo WAM, Kraków 2010.
- Ziemiński I., *Życie wieczne. Przyczynek do eschatologii filozoficznej*, W Drodze, Kraków 2013.



**Agata Płazińska**—Doctor of Humanities in Cultural Studies. Works at the Jesuit University Ignatianum in Krakow and the Tischner Institute. Her research interests include contemporary concepts of worship, the issues of sacrifice, life and work of Simone Weil, on top of relationship between ethics and culture.



**Piotr Duchliński**—Associate Professor at the Institute of Philosophy of the Jesuit University Ignatianum in Krakow. Conducts research in the field of methodology of humanities, metaphilosophy, epistemology, general ethics and axiology in addition to the history of philosophy in 20th century Poland.





**Mariusz Szram**<http://orcid.org/0000-0002-8646-6295>

Katolicki Uniwersytet Lubelski Jana Pawła II

m.szram@wp.pl

DOI: 10.35765/pk.2019.2704.04

## Ojcowie Kościoła o tożsamości teologii

---

### STRESZCZENIE

Celem artykułu jest przedstawienie modelowych cech, jakimi charakteryzowała się refleksja teologiczna doby patrystycznej. Są to: nierozłączne ukierunkowanie na Boga i na człowieka; uznanie Pisma Świętego za najważniejszy punkt odniesienia każdej refleksji teologicznej; umiejętność wykorzystania w tworzeniu podstaw teologii chrześcijańskiej elementów zaczerpniętych z obu kultur, w których otoczeniu pojawiła się nowa religia, zarówno semickiej, jak i helleńskiej; dążenie do uporządkowania i zdefiniowania podstawowych prawd wiary dotyczących Trójcy Świętej i osoby Jezusa Chrystusa; zachowanie postawy pokory w procesie poznania Boga; wewnętrzna jedność i spójność myśli teologicznej; duchowa głębia myślenia i egzystencjalne utożsamianie się z wyznawanymi prawdami wiary. Powyższe cechy teologii, na które zwrócili uwagę Ojcowie Kościoła, decydują o jej tożsamości i mogą ożywić także dzisiejszy sposób jej uprawiania.

**SŁOWA KLUCZE:** teologia, tożsamość, Ojcowie Kościoła

### ABSTRACT

#### *Fathers of the Church on the Identity of Theology*

The aim of the article is to present the model features that characterized the theological reflection of the patristic era. The list would comprise of the following: focus on both God and man; recognition of the Holy Scriptures as the most significant reference point of any

theological reflection; ability to use elements drawn from both cultures, the Semitic and Hellenic one, in the creation of the basics of Christian theology; striving to organize and define basic truths of faith regarding the Holy Trinity and the person of Jesus Christ; maintaining the attitude of humility in the process of knowing God; internal unity and coherence of theological thought; spiritual depth of thinking and existential identification with the confessed truths of faith. The above-mentioned features of theology to which the Fathers of the Church point define its identity as a scientific discipline and can as well revive a contemporary manner of practicing.

KEY WORDS: theology, identity, Fathers of the Church

Teologia Kościoła katolickiego rozwijała się przez wieki. Podstawy jej tożsamości jako nauki zajmującej się rozumną refleksją nad danymi Bożego objawienia, stanowiącymi przedmiot wiary, ukształtowały się w pierwszych pięciu stuleciach chrześcijaństwa<sup>1</sup>. Cechy charakterystyczne składające się na wypracowany wówczas model teologii, wpływające na metody jej uprawiania, a równocześnie wskazujące na sposób ówczesnego przeżywania religii przez jej wyznawców, są wciąż aktualne i tworzą swoisty wzorzec dla przyszłych pokoleń teologów oraz wszystkich chrześcijan myślących o wierze<sup>2</sup>.

W latach 40. XX w. uaktywnił się w Kościele prąd zmierzający do odnowy teologii katolickiej przez powrót do źródeł biblijnych i patrystycznych. Wybitnymi przedstawicielami tego nurtu byli francuscy teologowie, patrologi i historycy: Jean Daniélou, Henri de Lubac, Claude Mondésert

1 Na początku V w. św. Augustyn zaproponował dwie lapidarne definicje teologii, które w kilku słowach oddają jej istotę: *sermo de divinitate* – mowa o sprawach boskich, i *intellectus fidei* – zrozumienie wiary; por. Augustinus, *De civitate Dei* 8, 1; idem, *De fide et symbolo* 1, 1; idem, *De ordine* 2, 16; idem, *Contra Academicos* 3, 43. Zob. K. Barth, *Dogmatique*, vol. 1: *La doctrine de la Parole de Dieu. Prolégomènes à la Dogmatique*, Genève 1953, s. 1-8; M. Fiedrowicz, *Teologia Ojców Kościoła*, tłum. W. Szymona, Kraków 2009, s. 52-53.

2 Interesującą charakterystykę teologii patrystycznej przedstawiają: Instrukcja Kongregacji ds. Wychowania Katolickiego pt. *O studium Ojców Kościoła w formacji kapłańskiej* z 1989 r. („Vox Patrum” 1990, t. 18, s. 7-39) oraz L. Padovese, *Wprowadzenie do teologii patrystycznej*, tłum. A. Baron, Myśl Teologiczna 1, Kraków 1994, s. 33-40. Klasyczne opracowania poświęcone teologii patrystycznej to: J.N.D. Kelly, *Początki doktryny chrześcijańskiej*, tłum. J. Mrukówna, Warszawa 1988; M. Fiedrowicz, *Teologia Ojców Kościoła*, op. cit.; H. Pietras, *Początki teologii Kościoła*, Myśl Teologiczna 57, Kraków 20072; *Historia teologii*, t. 1: *Epoka patrystyczna*, red. A. di Berardino, B. Studer, tłum. M. Gołębiowski, J. Łukaszevska, J. Ryndak, P. Zarębski, Kraków 2003.

i Henri-Irénée Marrou<sup>3</sup>. Przyczynili się oni nie tylko do upowszechnienia znajomości greckich i łacińskich tekstów pochodzących z pierwszych siedmiu wieków chrześcijaństwa przez wydawanie kontynuowanej do dziś słynnej serii źródłowej *Sources Chrétiennes*<sup>4</sup>, ale stali się także prekursorami nowego wykorzystania myśli patrystycznej we współczesnej teologii. Nowość ta polegała na odejściu od instrumentalnego i selektywnego traktowania pism Ojców Kościoła, skupiającego się na wydobywaniu z nich argumentów apologetycznych, mających wspierać oficjalną doktrynę katolicką. Rozpoczęto badania nad dziełami wczesnochrześcijańskimi z uwzględnieniem szerokiego – historycznego i kulturowego – kontekstu ich powstania. Zaczęto dążyć do zrekonstruowania metody uprawiania teologii przez Ojców i próbowano ocenić, w jaki sposób może ona ożywić współczesną refleksję teologiczną<sup>5</sup>. Daniélou uważał, że Ojcowie Kościoła jako świadkowie kulturowego przełomu, wiążącego się ze schyłkiem Cesarstwa Rzymskiego, oraz jako doskonali znawcy problemów ludzkiej duszy, mogą najlepiej odpowiedzieć na wiele pytań stawianych zarówno przez współczesnego teologa, jak i zwykłego chrześcijanina. Mogą oni także „użyźnić” myślenie dzisiejszych ludzi wszechstronną kulturą i głęboką duchowością oraz niezwykłą intuicją pierwotnej wiary czasów bliskich Chrystusowi i apostołom<sup>6</sup>. Daniélou uznał również, że nowa wiosna Kościoła musi się dokonać przez powrót do pierwszej wiosny, czyli do okresu jego dojrzwania, kiedy to – jak pisał wybitny teolog szwajcarski Hans Urs von Balthasar – Kościół miał przysłowiowe „18 lat” i był pełen świeżych sił twórczych<sup>7</sup>. Ten postulat powrotu do źródeł stał się jednym z haseł Soboru Watykańskiego II. Pozostaje on nadal aktualny, szczególnie w czasach, gdy postowieceniowy scjentyzm i postmodernistyczna pogarda dla wszelkiej tradycji i autorytetów nakazują bardziej wątpić niż

---

3 Por. M. Szram, *Jean Daniélou – odnowa teologii przez tradycję patrystyczną*, w: *Wybitni teologowie XX wieku. Krąg języka francuskiego*, red. J. Jezierski, Olsztyn 2004, s. 39-40; M.J. Rondeau, *Jean Daniélou, Henri-Irénée Marrou et le renouveau des études patristiques*, w: *Les Pères de l'Église au XXe siècle. Histoire—Littérature—Théologie. L'aventure des „Sources Chrétiennes”*, Paris 1997, s. 351-370; R. Winling, *Teologia współczesna 1945-1980*, tłum. K. Kisielewska-Sławińska, Kraków 1990, s. 93-94.

4 Od powstania serii w 1942 r. wydano do tej pory 600 tomów oryginalnych tekstów greckich i łacińskich pisarzy wczesnochrześcijańskich z francuskim tłumaczeniem, obszernymi naukowymi wstępami, erudycyjnymi przypisami, a w wielu przypadkach także z pełnym aparatem krytycznym.

5 Por. M. Szram, *Jean Daniélou*, op. cit., s. 39.

6 Por. M.J. Rondeau, *Jean Daniélou, Henri-Irénée Marrou*, op. cit., s. 351-354.

7 Por. H. Urs von Balthasar, *Présence et pensée. Essai sur la philosophie religieuse de Grégoire de Nysse*, Paris 1988, s. 13-14; M. Szram, *Jean Daniélou*, s. 51.

wierzyć i usiłują niekiedy pozbawić teologię jako naukę duchowej głębi, a nawet odmówić jej racji bytu.

Przedstawię w kilku punktach modelowe cechy, jakimi charakteryzowała się refleksja teologiczna doby patrystycznej, określające tożsamość teologii Kościoła promieniującą na kolejne stulecia. Z jednej strony uświadamiają one, dlaczego okres kształtowania się myśli chrześcijańskiej podczas pierwszych wieków istnienia Kościoła był tak ważny dla dalszego rozwoju teologii, z drugiej – wskazują, co zostało zaniedbane, a co może ożywić rozumną refleksję nad wiarą dzisiaj, gdy często szuka ona swojego miejsca i sensu w otwarciu się na problemy współczesnego świata. Ojcowie Kościoła pokazują nieustannie, że rozwiązanie problemów jakiegokolwiek epoki w duchu chrześcijańskiej wiary nie polega na dostosowaniu się do sposobu myślenia świata, ale że głównym celem orędzia chrześcijańskiego jest przemiana świata i człowieka przez wprowadzenie doń światła i tchnienia, czy też – jak mówi Balthasar – ducha i ognia<sup>8</sup>, którego on sam sobie dać nie może.

## Teocentryzm i antropocentryzm teologii

Pierwszą zasadniczą cechą teologii patrystycznej jest jej ukierunkowanie zarówno na Boga, jak i na człowieka. Stawia ona sobie za cel pełne nasświetlenie relacji między nimi. Z jednej strony jest nastawiona na poznanie Stwórcy, na ile to jest możliwe dla ludzkiej natury w świetle otrzymanego Objawienia, z drugiej – na ukazanie możliwości zbawienia, jaka jest dostępna dla całej ludzkości stworzonej na obraz Boży i wezwanej do upodobnienia się do Boga i ścisłego zjednoczenia z Nim. Teocentryzm myśli patrystycznej wyraża się w greckim pojęciu *theoria* odniesionym do Boskiego Absolutu, oznaczającym poznanie i kontemplowanie Go<sup>9</sup>. Antropocentryzm teologii patrystycznej określa natomiast greckie pojęcie *oikonomia* – ekonomia zbawcza, czyli działanie Boga mające na celu przywrócenie człowiekowi pełnej godności utraconej przez grzech<sup>10</sup>.

8 Por. H.U. von Balthasar, *Wstęp*, w: Orygenes, *Duch i ogień*, wybór tekstów i wprowadzenie H. Urs von Balthasar, tłum. S. Kalinkowski, Biblioteka Ojców Kościoła 4, Kraków–Warszawa 1995, s. 18.

9 Por. G.W.H. Lampe, *A Patristic Greek Lexicon*, Oxford 1971, s. 648-649; A. Tomkiel, *Ojcowie Kościoła uczą nas modlitwy*, Warszawa 1995, s. 179; *Historia teologii*, t. 1: *Epoka patrystyczna*, op. cit., s. 21-22; J.N.D. Kelly, *Początki doktryny*, op. cit., s. 66.

10 Por. G.W.H. Lampe, *A Patristic Greek Lexicon*, s. 940-942; G.L. Prestige, *Dio nel pensiero dei Padri*, Bologna 1969, s. 79-88.

Ów dialog tego, co boskie, z tym, co ludzkie, stanowiący przedmiot refleksji teologicznej, wyraża powtarzana wielokrotnie w okresie patrystycznym fraza: „Bóg stał się człowiekiem, aby człowiek stał się Bogiem”<sup>11</sup>. Tę samą myśl zawiera znane zawołanie papieża Leona Wielkiego: „Poznaj swoją godność, chrześcijaninie, widząc Syna Bożego, który przyjmuje twoje ciało”<sup>12</sup>. Jak słusznie zauważył słynny teolog prawosławny Paul Evdokimov, teologia oznacza u wschodnich Ojców Kościoła rozważanie tajemnicy Trójcy Świętej, światłość Bożą odbitą w zwierciadle oczyszczonej duszy. Poznanie to nie ma nigdy u Ojców znaczenia teoretycznego, oderwanego od rzeczywistości, w jakiej żyje człowiek, ale ma na celu wskazanie jedynej zbawczej, a tym samym w najwyższym stopniu praktycznej drogi zjednoczenia człowieka z Bogiem<sup>13</sup>. Teolog poznaje Boga w Trójcy Jedynego, aby bezzwłocznie potem dzielić się Jego tajemnicą z otaczającymi go bliźnimi. Chociaż Ojcowie znali doskonale kulturę swoich czasów i swobodnie władali aparatem pojęć filozoficznych, nigdy nie poprzestawali na tworzeniu teologii idei, ale dążyli do tego, aby wiedza o Bogu i człowieku prowadziła do postawy większej miłości. Ich myśl teologiczna miała charakter pastoralny i odpowiadała na konkretne problemy wspólnoty chrześcijan. Rodziła się nie tylko z wewnętrznej potrzeby poznania Boga, ale z głębokiego wycucia duszpasterskich potrzeb<sup>14</sup>.

## Biblijne zakorzenienie teologii

Druga istotna cecha myśli patrystycznej to uznanie Pisma Świętego za najważniejszy punkt odniesienia każdej refleksji teologicznej. Jak stwierdza wybitny znawca egzegezy patrystycznej Manlio Simonetti, Ojcowie Kościoła „myśleli Biblią”<sup>15</sup>. Jej nieznanomość uznawali za przejaw braku znajomości osoby Jezusa Chrystusa czy wręcz braku zainteresowania

---

11 Por. Irenaeus, *Adversus haereses* III, 19, 1; Clemens Alexandrinus, *Protrepticus* I, 8, 4; Origenes, *Contra Celsum* III, 28; Athanasius, *De incarnatione verbi* 54, 3; idem, *Orationes contra arianos* 1, 39; Gregorius Nazianzenus, *Orationes* 29, 19; Leo Magnus, *Sermones* 26, 2; Maximus Confessor, *Liber asceticus* 43. Zob. J. Naumowicz, *Wcielenie Boga i zbawienie człowieka. Złota reguła soteriologii patrystycznej*, „Warszawskie Studia Teologiczne” 2000, nr 13, s. 17-30.

12 Por. Leo Magnus, *Sermones* 21, 3.

13 Por. P. Evdokimov, *Poznanie Boga w tradycji wschodniej. Patrystyka, liturgia, ikonografia*, tłum. A. Liduchowska, Kraków 1996, s. 17-20.

14 Por. L. Padovese, *Wprowadzenie do teologii*, op. cit., s. 37-38.

15 Por. M. Simonetti, *Między dosłownością a alegorią. Przyczynek do historii egzegezy patrystycznej*, tłum. T. Skibiński, *Myśl Teologiczna* 26, Kraków 2000, s. 7.

nią<sup>16</sup>. Autorzy wczesnochrześcijańscy nie tylko odczytywali księgi biblijne w ich kontekście historyczno-kulturowym, ale przede wszystkim zwrócili uwagę na jedność obu Testamentów oraz na chrystocentryzm Pisma Świętego<sup>17</sup>. Doszukiwali się oni w słowach zapisanych na kartach całego Pisma ukrytego w nich, jak za zasłoną, Słowa przez duże „S”, czyli samego Jezusa Chrystusa – boskiego osobowego Logosu, stanowiącego zarazem autora, jak i głównego bohatera Biblii, nadającego jej ostateczny sens duchowy<sup>18</sup>. To w epoce patrystycznej ukształtował się sposób interpretacji tekstu biblijnego zwany typologią, uznający starotestamentalne postacie i wydarzenia za figury, które zrealizują się w osobie i misji Chrystusa<sup>19</sup>.

Egzegeci ze środowiska aleksandryjskiego, nawiązując do egzegezy duchowej Starego Testamentu, uprawianej w Aleksandrii I wieku przez zhellenizowanego Żyda Filona<sup>20</sup>, szli jeszcze dalej w duchowej interpretacji tekstów biblijnych, dostrzegając w nich nie tylko odniesienie do Chrystusa, ale także do życia duchowego każdego chrześcijanina<sup>21</sup>.

- 
- 16 Por. Hieronymus, *Commentarii in Isaiam*, Prologus. Zob. W. Turek, „Nieznanomość Pisma Świętego jest nieznanomością Chrystusa”. *Rola Słowa Bożego w życiu konsekwowanym na podstawie niektórych tekstów św. Hieronima*, „Warszawskie Studia Teologiczne” 2015, nr 28/4, s. 21-26.
- 17 Por. J. Daniélou, *Les divers sens de l'Écriture dans la tradition chrétienne primitive*, „Ephemerides Theologicae Lovanienses” 1948, nr 24, s. 119-126; idem, *L'unité des deux Testaments dans l'oeuvre d'Origène*, „Revue des Sciences Religieuses” 1948, nr 22, s. 27-56; M. Starowieyski, *O staroziach, czyli czego możemy się nauczyć od starożytnego Kościoła*, „Warszawskie Studia Teologiczne” 2018, nr 31/2, s. 19.
- 18 Por. Origenes, *Homiliae in Leviticum* 1, 1; idem, *Homiliae in Ieremiam* 9, 1; idem, *Commentarii in Iohannem* X, 39, 266; idem, *De principiis* IV, 1, 7. Zob. H. de Lubac, *Histoire et esprit. L'intelligence de l'Écriture d'après Origène*, Paris 1950, s. 336-373; M. Szram, *Chrystus – Mądrość Boża jako klucz interpretacyjny Pisma świętego w ujęciu Orygenesa*, w: *Mistrz i Przyjaciel. Księga pamiątkowa ku czci Księdza Profesora Marka Zahajkiewicza*, red. J. Pałucki, Lublin 1997, s. 225-238; idem, *Duchowy sens liczb w alegorycznej egzeziezie aleksandryjskiej (II-V w.)*, Lublin 2001, s. 99-100, 301-306; idem, *Osobowy charakter biblijnego Słowa w rozumieniu Orygenesa*, „Verbum Vitae” 2005, nr 7, s. 189-193.
- 19 Por. J. Daniélou, *Sacramentum Futuri. Études sur les origines de la typologie biblique*, Paris 1950; H. de Lubac, *Typologie et Allégorisme*, „Recherches de Science Religieuse” 1947, nr 34, s. 180-226; J.-N. Guinot, *La typologie comme système herméneutique*, w: *Figures de l'Ancien Testament chez les Pères*, Cahiers de Biblia Patristica 2, Strasbourg 1989, s. 7-8.
- 20 Por. J. Daniélou, *Philon d'Alexandrie*, Paris 1958, s. 85-142; D.T. Runia, *Filone di Alessandria nella prima letteratura cristiana*, red. R. Radice, Collana Platonismo e filosofia patristica. Studi e testi 14, Milano 1999, s. 131-227; M. Szram, *Duchowy sens liczb*, op. cit., s. 57-62; idem, *Inspiracje judeohelleńską egzegezą Filona Aleksandryjskiego w pismach św. Hieronima*, „Vox Patrum” 2012, t. 57, s. 480-487.
- 21 Por. J. Daniélou, *Typologie et allégorie chez Clement d'Alexandrie*, „Studia Patristica” 1961, t. 4, s. 50-57; D. Dawson, *Allegorical Readers and Cultural Revision in Ancient Alexandria*, Berkeley-Los Angeles-Oxford 1992, s. 16; M. Szram, *Aleksandryzizm w zachodniej egzeziezie patrystycznej*, w: *W służbie Bogu bogatemu w miłosierdzie w przestrzeni Kościoła w Elku, Białymstoku i na Warmii. Metropolie Warmińskiemu Wielkiemu Kanclerzowi Wydziału Teologii Uniwersytetu*

Przykładowo dla Orygenesa – głównego teoretyka i praktyka egzegezy alegorycznej na przełomie II i III w. – przeprowadzenie Izraelitów przez pustynię i doprowadzenie do ziemi obiecanej przez Jozuego było najpierw zapowiedzią wyprowadzenia ludzkości z niewoli grzechu przez nowego Jozuego, czyli Jezusa, i wprowadzenia jej do królestwa niebiańskiego, będącego docelową ziemią obiecaną dla wszystkich wierzących. Następnie stanowiło ono wskazówkę duchową dla każdego chrześcijanina, który na wzór Chrystusa i z Jego pomocą ma w swoim własnym życiu pokonywać drogę od zniewolenia grzechem do wolności dziecka Bożego<sup>22</sup>.

Egzegeza patrystyczna kierowała się zasadami, które nie mogą umknąć z pola widzenia współczesnym biblistom. Po pierwsze, każde wyjaśnienie tekstu natchnionego musi z jednej strony dążyć do uchwycenia znaczenia, jakie zawarł w nim pierwszy i najważniejszy autor Biblii, czyli sam Bóg, z drugiej strony – ma mieć na względzie przede wszystkim dobro duchowe czytelnika Słowa Bożego, określane greckim terminem „opheleia”<sup>23</sup>. Po drugie, nie można – w przekonaniu pisarzy wczesnochrześcijańskich – oddzielać egzegezy naukowej od lektury duchowej Pisma. Oba sposoby podejścia do Biblii powinny się wzajemnie wspomagać, uzupełniać i przenikać. Egzegeta musi wykorzystywać nie tylko pełne wykształcenie humanistyczne, ale także prezentować odpowiednio wysoki poziom dojrzałości duchowej. W przeciwnym razie Pismo stanie się tylko przedmiotem badań historyka, a przecież Bóg nie przemawiał do człowieka po to, by uczyć go historii, ale aby go zbawić<sup>24</sup>.

## Akomodacja kulturowa teologii

Trzecia istotna cecha myśli patrystycznej to jej umiejętność wykorzystania w tworzeniu podstaw teologii chrześcijańskiej elementów zaczerpniętych z obu kultur, w których otoczeniu pojawiła się nowa religia, zarówno

---

*Warmińsko-Mazurskiego Jego Ekleksjencji Księdzu Arcybiskupowi Doktorowi Wojciechowi Ziembie w 40 rocznicę święceń kapłańskich i 25 rocznicę święceń biskupich*, red. S. Kozakiewicz, Olsztyn 2007, s. 346-359.

22 Por. Origenes, *Homiliae in Numeros* 27. Zob. E. Stanula, *Życie duchowe w ujęciu Orygenesa*, w: idem, *Eseje patrystyczne*, Warszawa 2014, s. 87-110.

23 Por. H. de Lubac, „Sens spirituel”, „Recherches de Science Religieuse” 1949, nr 36, s. 542-576; M. Simonetti, *Między dosłownością a alegorią*, op. cit., s. 78; M. Szram, *Duchowy sens liczb*, op. cit., s. 302-303.

24 Por. H. de Lubac, *Histoire et esprit. L'intelligence de l'Écriture d'après Origène*, Paris 1950, s. 384-395.

semickiej, jak i helleńskiej<sup>25</sup>. Pierwotna teologia judeo-chrześcijańska I i II w. – jak dowiódł J. Daniélou – wyrażała się w sposób naturalny w kategoriach zapożyczonych z judaizmu, związanych szczególnie z kosmologią, angelologią i apokaliptyką<sup>26</sup>. Na przełomie II i III w. w Aleksandrii, stanowiącej centrum naukowe ówczesnego Cesarstwa Rzymskiego, dokonano się w osobach Klemensa i Orygenesusa swoiste pojednanie kultury helleńskiej z orędziem chrześcijańskim, opisane w połowie ubiegłego stulecia w syntezach wybitnych filologów klasycznych i patrologów Henriego Chadwicka, Waltera Jaegera i Jeana Daniélou<sup>27</sup>.

Motywy tego pojednawczego kroku były co najmniej dwa. Powód pierwszy to przekonanie o pochodzeniu wszelkiej mądrości z jednego boskiego źródła Boskiej Sofii, co pozwalało dostrzegać rozumne zarodki prawdy (*logoi spermatikoi*) w kulturze antycznej, traktowanej jako swoisty podnóżek chrześcijańskiej teologii i zaplanowane przez Boga przygotowanie do przyjęcia Ewangelii przez Hellenów, nazywane przez Klemensa „trzecim Testamentem”<sup>28</sup>. Przyczyna druga to kierowanie się zasadą akomodacji misyjnej w celu dotarcia do pogan z orędziem Ewangelii przekazanym w zrozumiały dla nich sposób<sup>29</sup>. Autorzy aleksandryjscy i liczni późniejsi wczesnochrześcijańscy teolodzy eksponowali zbieżności między poglądami starożytnych filozofów, zwłaszcza w zakresie etyki, i nauką Chrystusa, a także wykorzystywali antyczne pojęcia filozoficzne do precyzyjnego i usystematyzowanego wyrażenia podstawowych prawd nowej wiary, bez naruszenia oryginalności Ewangelii<sup>30</sup>. W ten sposób dali przysłym

25 Por. G. Dorival, *Les chrétiens de l'Antiquité face à la culture classique et à l'hellénisme*, „Revue des Sciences Religieuses” 2000, nr 74/4, s. 419-436; M. Starowieyski, *O starociach*, op. cit., s. 19-20.

26 Por. J. Daniélou, *Teologia judeochrześcijańska*, tłum. S. Basista, Myśl Teologiczna 39, Kraków 2002, s. 140-204.

27 Por. W. Jaeger, *Wczesne chrześcijaństwo i grecka paideia*, tłum. K. Bielawski, Bydgoszcz 1997; H. Chadwick, *Myśl wczesnochrześcijańska a tradycja klasyczna*, tłum. P. Siejkowski, Poznań 2000; J. Daniélou, *Message évangélique et culture hellénistique aux IIe et IIIe siècles*, Tournai 1961.

28 Por. Iustinus Martyr, 2 *Apologia* 8, 1; Clemens Alexandrinus, *Stromata* I, 28, 2-3; ibidem, VII, 11, 1-2. Zob. J. Pałucki, *Recepcja ideałów helleńskich w nauce Klemensa Aleksandryjskiego*, „Roczniki Teologiczne” 1994, nr 41/4, s. 5-27; F. Drączkowski, *Filozofia grecka jako „trzeci Testament”, czyli praeparatio evangelica w rozumieniu Klemensa Aleksandryjskiego*, w: *Wczesne chrześcijaństwo a religie*, red. I.S. Ledwoń, M. Szram, Lublin 2012, 407-424; J. Grzywaczewski, *Idea trzech Testamentów Klemensa z Aleksandrii*, „Studia Nauk Teologicznych” 2016, nr 11, s. 89-107.

29 Por. N. Widok, *Akomodacja misyjna w teorii i praktyce Klemensa Aleksandryjskiego*, Opole 1992; T. Kolosowski, *Inkulturowanie religijnych wartości pogańskich w chrześcijaństwie w twórczości wczesno-chrześcijańskich apologetów greckich. Stanowisko Atenagorasa i Justyna*, w: *Wczesne chrześcijaństwo a religie*, op. cit., s. 319-327.

30 Por. J. Wojtczak, *Stosunek Klemensa Aleksandryjskiego do filozofii według Stromata*, „Studia Theologica Varsaviensia” 1971, nr 9/1, s. 263-288; R. Cantalamessa, *Cristianesimo primitivo e filosofia greca*, w: *Il cristianesimo e le filosofie*, red. R. Cantalamessa, Milano 1971, s. 26-57;



pokoleniom impuls do roztropnego korzystania z mądrości i bogactwa duchowego zawartego w innych wyznaniach, religiach i kulturach, a także posługiwania się wiedzą z zakresu wielu szczegółowych dyscyplin naukowych, jak: językoznawstwo, historia, biologia czy astronomia, przy równoczesnym pozostaniu wiernym istocie przesłania chrześcijańskiego.

Obowiązkową lekturą każdego współczesnego teologa powinno stać się dziełko św. Bazylego Wielkiego, jednego z grona tzw. Ojców Kapadoczkich, wybitnych teologów IV w., który posiadał ogromną wiedzę podczas studiów w Atenach, ale ostatecznie wybrał poszukiwanie prawdziwej mądrości w kontemplacji Słowa Bożego. Napisał on mowę skierowaną do młodzieży o pożytku, jaki chrześcijanie mogą odnieść ze studiowania literatury starożytnej. Bazyli pokazuje, że zawiera ona zarodki prawdy i mądrości, wsiane tam przez Bożą mądrość, i pomaga w przyjęciu Ewangelii:

Dzięki wtajemniczeniu w pogańskie pisma przygotowujemy się do słuchania nauk świętych i nie dających się wyrazić w słowach; przyzwyczajeni do oglądania słońca w wodzie, skierujemy oczy wprost na samo światło (...). Jeśli zachodzi jakaś zgodność między tymi naukami, to pożyteczna jest dla nas ich znajomość (...). Skoro więc mamy dojść do tamtego innego życia przez cnotę, którą z zachwytem opiewało wielu poetów i prozaików, a jeszcze więcej filozofów, to na ich wypowiedzi trzeba zwrócić szczególną uwagę. (...) Przyjmijmy więc nauki, w których są zasady dobrego postępowania. A ponieważ dobre czyny starożytnych ludzi doszły do nas bądź w nieprzerwanej pamięci, bądź zachowały się w pismach poetów czy historyków, nie gardźmy korzyścią, jaka z nich może płynąć<sup>31</sup>.

## Systematyzacja doktryny i formułowanie dogmatów

Czwarta istotna cecha teologicznej myśli patrystycznej to jej dążenie do uporządkowania i zdefiniowania podstawowych prawd wiary dotyczących Trójcy Świętej i osoby Jezusa Chrystusa. W epoce patrystycznej zostały precyzyjnie wyrażone podstawowe dogmaty trynitarne i chrystologiczne,

---

zob. także klasyczne opracowania dotyczące inspiracji filozofią platońską i stoicką w teologii patrystycznej: H.A. Wolfson, *La filosofia dei Padri della Chiesa*, vol. 1: *Spirito, Trinità, Incarnazione*, Brescia 1978; C. Moreschini, *Storia della filosofia patristica*, Brescia 2004; M. Spanneut, *Le stoïcisme des Pères de l'Eglise de Clément de Rome à Clément d'Alexandrie*, Paris 1957; E. von Ivanka, *Plato Christianus. La réception critique du platonisme chez les Pères de l'Eglise*, Paris 1990, s. 13-17.

31 Por. Basilius Magnus, *De legendis gentilium libris* 2-7, tłum. R. Andrzejewski: Święty Bazyli Wielki, *Do młodzieńców o korzyściach z czytania ksiąg pogańskich*, „Vox Patrum” 2012, t. 57, s. 906-911.

czego świadectwem są orzeczenia pierwszych soborów powszechnych: nicejskiego (325), konstantynopolińskiego (381), efeskiego (431) i chalcedońskiego (451). Nic dziwnego, że w starożytnym Kościele porównywano te cztery kluczowe sobory do czterech Ewangelii<sup>32</sup>. Cała późniejsza teologia stanowi komentarz do ogłoszonych wówczas formuł dogmatycznych.

Dojście do tego ostatecznego sformułowania podstawowych dogmatów dokonało się we wczesnym chrześcijaństwie w sporach z licznymi herezjami, które w paradoksalny sposób okazały się „błogosławioną winą”, przyczyniając się do ożywienia dyskusji teologicznej i sprecyzowania ortodoksyjnej doktryny<sup>33</sup>. Czytając pisma Ojców z jednej strony można poznać argumenty tych, którzy proponowali rozwiązania uznane ostatecznie za błędne, i uwrażliwić się na wiele współczesnych błędów zagrażających ortodoksyjnej wierze, będących w większości odmianą herezji znanych w starożytności, których wczesnochrześcijańskie katalogi wyliczają około 160<sup>34</sup>. Z drugiej strony można się uczyć od myślicieli wczesnochrześcijańskich sposobu argumentacji w dyskusji filozoficzno-teologicznej. Skoro współcześnie ruchy ateistyczne przywołują argumenty skierowane przeciw chrześcijaństwu w II w. przez słynnego greckiego polemistę Celsusa, to należy również sięgnąć do apologii, jaką przeciw zarzutom Celsusa napisał w III w. Orygenes. Wykazał on, że wiele oskarżeń wypływało z niewiedzy, nielogicznego myślenia, przywiązania do antycznego modelu religijności lub niewłaściwego rozumienia filozoficznych poglądów platońskich i stoickich, w dużym stopniu dających się pogodzić z przesłankami biblijnymi<sup>35</sup>.

32 Por. Gregorius Magnus, *Epistulae* 1, 24. Zob. G. Bardy, *L'inspiration des Pères de l'Eglise*, „Recherches de Science Religieuse” 1952, nr 40, s. 25; S. Pawłowski, *Czy istnieje „hierarchia soborów”? Perspektywa ekumeniczna*, w: *Przed Soborem Wszechprawoosławnym*, red. T. Kałużny, Z.J. Kijas, Biblioteka Ekumenii i Dialogu 38, Kraków 2016, s. 83-101.

33 Por. istotne opracowania dotyczące herezji wczesnochrześcijańskich: W. Bauer, *Rechtgläubigkeit und Ketzerei im ältesten Christentum*, Beiträge zur historischen Theologie 10, Tübingen 2 1964; A. Le Boulluec, *La notion d'hérésie dans la littérature grecque IIe-IIIe siècles*, t. 1-2, Paris 1985; M. Stachura, *Heretycy, schizmatycy i manichejczycy wobec cesarstwa rzymskiego (lata 324-428, wschodnia część Imperium)*, Kraków 2000; M. Fiedrowicz, *Teologia Ojców Kościoła*, op. cit., s. 381-453; *Ortodoksja, herezja, schizma w Kościele starożytnym*, red. F. Drączkowski, J. Pałucki, P. Szczur, M. Szram, Polihymnia, Lublin 2012.

34 Por. Epiphanius, *Panarion*; Theodoretus Cyrensis, *Haereticarum fabularum compendium*, Augustinus, *Liber de haeresibus*; Isidorus Hispalensis, *De haeresibus liber*; Ioannes Damascenus, *De haeresibus liber*. Najwięcej herezji opisał autor pierwszego traktatu o herezjach napisanego w języku łacińskim w drugiej poł. IV w. – biskup Breccii Filastriusz. Por. Filastriusz Brixienis, *Diversarum hereseon liber*.

35 Por. Origenes, *Contra Celsum* I, 1-25. Zob. M. Fédou, *Christianisme et religions païennes dans le „Contre Celse” d'Origène*, Paris 1988; R. Somos, *Strategy of Argumentation in Origen's „Contra Celsum”*, „Adamantius” 2012, nr 18, s. 200-217.

## Pokora teologa

Piątą istotną cechą myśli patrystycznej, ukazującą specyfikę teologii jako nauki, wiąże się z zachowaniem postawy, która każdemu naukowcowi, niezależnie od badanej przez niego dziedziny, przychodzi ze szczególną trudnością, mianowicie pokory<sup>36</sup>. Pracownik naukowy jest oceniany za swoją twórczość przede wszystkim według kryterium oryginalności i nowatorstwa. Rygorystyczne przyłożenie tej miary do oceny poczyniań naukowych teologa może się jednak okazać niebezpieczne i zaprowadzić go na manowce nieortodoksji. Chęć bycia oryginalnym za wszelką cenę, próba przekroczenia granic tajemnicy w poznaniu rzeczywistości transcendentnej oraz dostosowania koncepcji Boga do własnych teorii i wyobrażeń, lekceważenie wypracowanej przez wieki i przechowywanej w Kościele doktryny, której podstawy stanowią niezmiennie dogmaty wynikające z nauczania Ewangelii, to postawy sprzeczne z powołaniem teologa katolickiego i niszczące jego tożsamość. Według Grzegorza z Nazjanzu, któremu nadano w starożytnym Kościele zaszczytny przydomek „Teologa”, ideałem myśliciela chrześcijańskiego jest ten, kto mówi o Bogu z umiarkowaniem i skromnością, kto potrafi jedne rzeczy powiedzieć, z wypowiedzeniem innych się wstrzymać, a w jeszcze innych otwarcie wyznać swoją niewiedzę<sup>37</sup>.

W przekonaniu ortodoksyjnych teologów epoki patrystycznej w dyskursie teologicznym nie należy przekraczać dwóch barier: zgodności z nauką Ewangelii i z obowiązującą w Kościele „regula fidei”, czyli regułą wiary (zwaną także „regula veritatis” – regułą prawdy), będącą w pierwszych wiekach rodzajem oficjalnego ortodoksyjnego wyznania wiary<sup>38</sup>. Granice oryginalności w myśleniu teologicznym określił Orygenes we wstępie do swej summy filozoficzno-teologicznej *O zasadach*. Nie można

---

36 Por. szczegółowe omówienie patrystycznej teologii pokory: M. Szram, *Cnota pokory w nauczaniu greckich Ojców Kościoła IV wieku*, Lublin 2014.

37 Por. Gregorius Nazianzenus, *Orationes* 32, 19. Zob. D.M. Rogich, *The Development of a Theologian according to Saint Gregory the Theologian*, „The Greek Orthodox Theological Review” 1994, nr 39/1-2, s. 63-81. Kwestia pokory w mówieniu o Bogu, jako postawy odróżniającej teologa ortodoksyjnego od heretyckiego, powraca w traktatach antyheretyckich epoki patrystycznej. Por. Ioannes Chrisostomus, *De incomprehensibili Dei natura (Contra Anomaeos homiliae)* 2.

38 Por. Irenaeus, *Adversus haereses* I, 10, 1; Tertullianus, *Adversus Praxean* 2, 1-2. Zob. B. Hägglund, *Die Bedeutung der „regula fidei” als Grundlage theologischer Aussagen*, „Studia Theologica” 1958, nr 12, s. 1-44; J.N.D. Kelly, *Early Christian Creeds*, London 19723; R. Osborn, *Reason and the Rule of Faith in the Second Century AD*, w: *The Making of Orthodoxy: Essays in Honour of Henry Chadwick*, red. R. Williams, Cambridge 1989, s. 42-58; P.M. Blowers, *The „Regula Fidei” and the Narrative Character of Early Christian Faith*, „Pro Ecclesia” 1997, nr 6, s. 199-228; *Historia teologii*, t. 1: *Epoka patrystyczna*, op. cit., s. 163-169.

w refleksji teologicznej kwestionować podstawowych prawd wiary zawartych w regule wiary, takich jak: istnienie trójjedynego Boga, zbawcza misja Chrystusa wobec ludzkości, posiadanie duszy przez człowieka czy zmartwychwstanie ciała. Prawdy te należy jedynie komentować, wyjaśniać, uzasadniać, zastanawiać się nad ich wpływem na codzienne życie chrześcijanina. Dyskusja teologiczna powinna natomiast dotyczyć kwestii ostatecznie w wyznaniu wiary niezdefiniowanych lub nieporuszanych, np. sposobu i momentu powstawania ludzkiej duszy czy postaci, w jakiej zmartwychwstaje ludzkie ciało<sup>39</sup>. Podstawową zasadą kierującą pracą teologa powinno więc być – w opinii myślicieli wczesnochrześcijańskich – dążenie nie do odkrywania nowej prawdy, ale do wyjaśniania prawdy już znanej, objawionej przez Boga, z zachowaniem pokory wobec Chrystusa i Kościoła.

## Jedność i spójność myśli teologicznej

Szósta istotna cecha myśli patrystycznej to jej wewnętrzna jedność, spójność. Współczesna teologia ma za sobą wielowiekowe doświadczenie dyscypliny naukowej, usystematyzowanej i podzielonej na różne dziedziny: historyczne, teoretyczne i praktyczne. Myśl wczesnochrześcijańska stanowiła pod tym względem monolit. Teolog doby patrystycznej był równocześnie biblistą, dogmatykiem, teologiem duchowości i pastoralistą, czego przykładem mogą być dwaj najbardziej wszechstronni teolodzy starożytności chrześcijańskiej – Orygenes na Wschodzie i Augustyn na Zachodzie, którzy pozostawili arcydzieła w każdym z wyżej wymienionych działów teologii. Wychodzili oni zawsze od przesłanek biblijnych, wyjaśniali je za pomocą pojęć zaczerpniętych z filozofii i w polemice z inaczej myślącymi precyzowali główne założenia doktryny wiary, a następnie wskazywali, jak przeżywać je we własnej duszy i jak realizować w codziennym życiu.

Wielu Ojców Kościoła, np. Ojcowie Kapadoccy, miało za sobą zarówno studia na renomowanych uczelniach, jak i staż na pustyni, gdzie prowadzili życie kontemplacyjne. Teologa epoki patrystycznej można więc określić mianem myśliciela wewnętrznie zintegrowanego, głoszącego jedną naukę, przez analogię do słów Orygenesesa, który podkreślał, że prawda Boża jest jedna, chociaż bogata w swej treści, a ten, kto głosi naukę chrześcijańską, choćby wypowiadał wiele słów, zawsze sprowadza je do tego Jedynego Słowa, które było na początku, przez które wszystko się

39 Por. Origenes, *De principiis*, Prologus. Zob. *Historia teologii*, t. 1: *Epoka patrystyczna*, op. cit., s. 224-229.

stało i które przyszło do swoich w ludzkiej postaci<sup>40</sup>. Myśliciele wczesno-chrześcijańscy zachęcają więc współczesnych teologów specjalistów do współpracy i szerszego spojrzenia na kwestie badane w świetle własnej specjalizacji, a przede wszystkim zwracają uwagę, aby nie tylko prowadzili swoje badania za pomocą intelektu oświeconego wiarą, ale by głęboko kontemplowali i przeżywali to, co stało się wcześniej przedmiotem ich rozumowej refleksji<sup>41</sup>.

## Duchowy wymiar teologii

Siódma istotna cecha teologii patrystycznej wiąże się właśnie z ową duchową głębią myślenia i egzystencjalnym utożsamianiem się z wyznawanymi prawdami wiary, a przede wszystkim z przebijającą z pism Ojców wielką miłością do Chrystusa. Był On dla nich nie tylko przedmiotem refleksji, ale żywą Osobą, z którą trzeba być nieustannie w bliskim kontakcie. Orygenes mówi o konieczności *oikeiosis*, czyli zamieszkania, wręcz zadowolenia się Jezusa w duszy chrześcijanina<sup>42</sup>. Tylko wtedy przekazywana nauka jest autentyczna i wiarygodna, bo wcześniej była osobiście przeżyta, czy wręcz przeżuta, co wyraża używany w kręgach monastycznych łaciński termin *ruminatio*, oznaczający długie, żmudne „przeżuwanie” słowa Bożego, zarówno rozumem, jak i codzienną praktyką życiową<sup>43</sup>.

Szczególnie uderzające jest w pismach epoki patrystycznej umiejętne łączenie refleksji teologicznej z modlitwą, będące owocem świadomości, że myśleć o Bogu można tylko wtedy, jeżeli najpierw posiadasz się Ducha Bożego, i że teologia ma sens tylko wtedy, jeżeli prowadzi tego, który ją uprawia, i tego, do kogo jest skierowana, do modlitwy i większej łączności z Bogiem. Ewagriusz z Pontu, mnich i teolog z IV w., mówił: „Tylko wtedy, gdy modlisz się prawdziwie, jesteś teologiem”<sup>44</sup>. Klemens Aleksandryjski tym samym greckim terminem „homilia” określił modlitewną rozmowę z Bogiem i rozważanie tekstu biblijnego w liturgii. Zwrócił w ten sposób uwagę, że komentowanie Pisma Świętego ma ścisły związek

---

40 Por. Origenes, *Homiliae in Librum primum Regnorum (Samueli I)* 1, 4; idem, *Homiliae in Ezechielem* 9, 1. Zob. M. Szram, *Duchowy sens liczb*, op. cit., s. 123-126.

41 Por. M. Starowieyski, *O staroziach*, op. cit., s. 22.

42 Por. Origenes, *Commentarii in Iohannem XIII*, 147-150. Zob. I. Ramelli, *The Stoic Doctrine of Oikeiosis and its Transformation in Christian Platonism*, „Apeiron. A Journal for Ancient Philosophy and Science” 2014, nr 47/1, s. 116-140.

43 Por. A. Tomkiel, *Ojcowie Kościoła*, op. cit., s. 135; B. Nadolski, *Lectio divina*, „Ruch Biblijny i Liturgiczny” 2001, nr 54, s. 48.

44 Por. Evagrius Ponticus, *De oratione* 60.

z modlitwą, ma z niej wyrastać i do niej prowadzić<sup>45</sup>. Ojcowie Kościoła niejednokrotnie rozpoczynali modlitwą nie tylko homilie, ale także naukowe komentarze do Pisma Świętego, prosząc o to, aby towarzyszył im w pracy ten sam Duch, który oświecał autorów biblijnych ksiąg; a kończyli swoje prace pochwalną inwokacją do trójjedynego Boga i prośbą o wypełnienie w życiu tego, co udało się im zrozumieć z tekstu Biblii<sup>46</sup>. Paul Evdokimov określa teologię w rozumieniu Ojców jako posługę charyzmatyczną, sprawowaną w przekonaniu, że nikt nie może poznać Boga, jeśli sam Bóg go nie pouczył<sup>47</sup>.

## Podsumowanie

Moim celem w niniejszym artykule nie była apologia teologii epoki patrystycznej ani tym bardziej szczególne eksponowanie patrologii jako nauki teologicznej. Trzeba zdawać sobie sprawę, że myśl wczesnochrześcijańska miała też swoje cienie w postaci stworzenia koncepcji uznanych za heretyckie. Język teologiczny dopiero się tworzył i powodował wiele niejasności. Niemniej jednak była to teologia bliska Biblii i myśleniu czasów Chrystusowych i apostoelskich; teologia pełna płomiennego ducha, nastawiona na bezinteresowne poznanie prawdy i dotarcie do prawdziwej mądrości, pragnąca zbliżyć człowieka do Boga. Staralem się, w duchu soborowego postulatu sięgania *ad fontes*, oddać w syntetyczny sposób ducha wczesnochrześcijańskiej myśli teologicznej i wskazać na te cechy, które decydują o jej tożsamości, których nie wolno zaprzepaścić podczas uprawiania teologii w jakiegokolwiek epoce, i które mogą ożywić także dzisiejsze przeżywanie chrześcijaństwa. Biblia i Tradycja, której zasadniczy zrąb stanowi dziedzictwo epoki patrystycznej, stanowią łącznie podstawowe źródła Objawienia chrześcijańskiego, natomiast dziedziny nauki je badające – biblistyka i patrystyka – tworzą niewzruszone i stale inspirujące podstawy teologii. Wspomniany na wstępie jeden z twórców odnowy patrystycznej w XX w., J. Daniélou, określił swój ideał teologa w sposób, który można odnieść z powodzeniem do myślicieli epoki patrystycznej, których ukochał, a także przedstawić jako wzór dla współczesnych i przyszłych teologów, poszukujących swojej tożsamości: „Właściwością teologa

45 Por. Clemens Alexandrinus, *Stromata* VII, 39, 6. Zob. F. Drączkowski, *Kościół-Agape według Klemensa Aleksandryjskiego*, Lublin 1983, s. 84-85; E. Staniek, *Koncepcja homilii patrystycznej*, „Vox Patrum” 2003, t. 44-45, s. 26-27.

46 Por. M. Szram, *Koncepcje komentarza biblijnego w epoce patrystycznej*, „Vox Patrum” 2003, t. 44-45, s. 40-41.

47 Por. P. Evdokimov, *Poznanie Boga*, op. cit., s. 18.

jest krążenie między wiecznością i czasem, jak to czynili aniołowie na drabinie Jakuba oraz splatanie między tym, co niebiańskie i co ziemskie, wciąż nowych więzów”<sup>48</sup>.

#### BIBLIOGRAFIA

##### Źródła:

- Athanasius, *De incarnatione verbi*, wyd. Ch. Kannengiesser, Sources Chrétien-nes 199, Cerf, Paris 1973; tłum. M. Wojciechowski: Atanazy Wielki, *O wcieleniu Słowa*, Pisma Starochrześcijańskich Pisarzy 41, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1998.
- Athanasius, *Orationes contra arianos*, wyd. J.-P. Migne, Patrologia Graeca 26, 12-468, Petit-Montrouge, Paris 1857; tłum. P. Szewczyk: Atanazy Wielki, *Mowy przeciw arianom*, Źródła Myśli Teologicznej 67, Wydawnictwo WAM, Kraków 2013.
- Augustinus, *Contra Academicos*, wyd. W.M. Green, K.D. Daur, Corpus Christianorum Series Latina 29, Brepols, Turnhout 1970; tłum. K. Augustyniak: Św. Augustyn, *Przeciw ałakademikom*, w: Św. Augustyn, *Dialogi filozoficzne*, Wydawnictwo Znak, Kraków 1999, s. 57-150.
- Augustinus, *De civitate Dei*, wyd. B. Dombart, A. Kalb, Corpus Christianorum Series Latina 47-48, Brepols, Turnhout 1955; tłum. W. Kornatowski: Św. Augustyn, *O Państwie Bożym przeciw poganom ksiąg XXII*, t. 1-2, Instytut Wydawniczy Pax, Warszawa 1977.
- Augustinus, *De fide et symbol*, wyd. J.-P. Migne, Patrologia Latina 40, Petit-Montrouge, Paris 1845, 181-196; tłum. L. Gładyszewski: Augustyn, *O wierze i Symbolu*, Źródła Myśli Teologicznej 53, Wydawnictwo WAM, Kraków 2010.
- Augustinus, *De ordine*, wyd. W.M. Green, K.D. Daur, Corpus Christianorum Series Latina 29, Brepols, Turnhout 1970; tłum. J. Modrzejewski: Św. Augustyn, *O porządku*, w: Św. Augustyn, *Dialogi filozoficzne*, Wydawnictwo Znak, Kraków 1999, s. 155-233.
- Augustinus, *Liber de haeresibus*, wyd. R. Vander Plaetse, C. Beukers, Corpus Christianorum Series Latina 46, 262-351, Brepols, Turnhout 1969.
- Basilus M., *De legendis gentilium libris*, wyd. J.-P. Migne, Patrologia Graeca 31, 563-590, Petit-Montrouge, Paris 1857; tłum. R. Andrzejewski: Święty Bazyli Wielki, *Do młodzieńców o korzyściach z czytania ksiąg pogańskich*, „Vox Patrum” 2012, 57, s. 904-921.

---

48 Por. J. Daniélou, *Les orientations présentes de la pensée religieuse*, „Études” 1946, nr 249, s. 13, tłum. własne.

- Clemens Alexandrinus, *Protrepticus*, wyd. C. Mondesert, Sources Chrétiennes 2bis, Cerf, Paris 1976; tłum. J. Sołowianiuk: Klemens Aleksandryjski, *Zachęta Greków*, Pisma Starochrześcijańskich Pisarzy 44, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1988, s. 116-201.
- Clemens Alexandrinus, *Stromata*, wyd. L. Fruchtel, Libri I-VI, Griechische Christlichen Schriftsteller 52(15), Klemens Werke 2, Akademie-Verlag, Berlin 1960; Libri VII-VIII, Griechische Christlichen Schriftsteller 17, Klemens Werke 3, Akademie-Verlag, Berlin 1970; tłum. J. Niemirska-Pliszczyńska: Klemens Aleksandryjski, *Kobierce zapisków filozoficznych dotyczących prawdziwej wiedzy*, t. 1-2, Instytut Wydawniczy PAX, Warszawa 1994.
- Ephiphanius, *Panarion*, wyd. i tłum. M. Gilski: Epifaniusz z Salaminy, *Panarion. Herezje 1-33. Teksty grecki i polski*, opr. i kom. A. Baron, Kraków 2015.
- Evagrius Ponticus, *De oratione*, wyd. J.-P. Migne, Patrologia Graeca 79, 1165-1200, Petit-Montrouge, Paris 1965; tłum. K. Bielawski: Ewagriusz z Pontu, *O modlitwie*, w: Ewagriusz z Pontu, *Pisma ascetyczne*, t. 1, wstęp i opr. L. Nieścior, Źródła Monastyczne 18, Tyniec Wydawnictwo Benedyktynów, Kraków 1998, s. 249-277.
- Filastrius Brixienis, *Diversarum hereseon liber*, wyd. F. Heylen – G. Banterle, *Scriptores circa Ambrosium* 2, Città Nuova, Milano–Roma 1991.
- Gregorius Magnus, *Epistulae*, wyd. D. Norberg, Corpus Christianorum Series Latina 140-140A Brepols, Turnhout 1982; tłum. J. Czuj: Św. Grzegorz Wielki, Warszawa 1954-1955.
- Gregorius Nazianenus, *Orationes* 27-31, wyd. P. Gallay, Sources Chrétiennes 250, Cerf, Paris 1978; *Orationes* 32-37, wyd. P. Gallay, C. Moreschini, Sources Chrétiennes 318, Cerf, Paris 1985; tłum. zbiorowe, red. S. Kazikowski: Grzegorz z Nazjanzu, *Mowy wybrane*, Warszawa Instytut Wydawniczy PAX, Warszawa 1967, s. 274-414.
- Hieronymus, *Commentarii in Isaiam*, wyd. M. Adriaen, Corpus Christianorum Series Latina 73-73A, Brepols, Turnhout 1963.
- Ioannes Chrisostomus, *De incomprehensibili Dei natura (Contra Anomaeos homiliae 1-5)*, wyd. A.-M. Malingrey, Sources Chrétiennes 28bis, Cerf, Paris 1970.
- Ioannes Damascenus, *De haeresibus liber*, wyd. B. Kotter: *Die Schriften des Johannes von Damaskos*, t. 5, De Gruyter, Berlin 1980; tłum. A. Zhyrkova: Jan Damascęński, *O herezjach*, w: Jan Damascęński, *Dialektyka albo rozdziały filozoficzne. O herezjach*, Źródła Myśli Teologicznej 59, Wydawnictwo WAM, Kraków 2011, s. 105-139.
- Irenaeus, *Adversus haereses*, wyd. A. Rousseau, L. Doutreleau, B. Hemmerdinger, Ch. Mercier, Liber I, Sources Chrétiennes 263-264, Cerf, Paris 1979; Liber II, Sources Chrétiennes 293-294, Cerf, Paris 1982; Liber III, Sources Chrétiennes 210-211, Cerf, Paris 1974; Liber IV, Sources Chrétiennes 100/1-2, Cerf, Paris 1965; Liber V, Sources Chrétiennes 152-153, Cerf,



- Paris 1969; tłum. J. Brylowski: Św. Ireneusz z Lyonu, *Adversus haereses*, Bernardinum, Pelpin 2018.
- Isidorus Hispalensis, *De haeresibus liber*, wyd. A.C. Vega, Patrologia Latina Supplementum 4, Garnier, Paris 1970, 1815-1820; tłum. M. Cholewa: *Świętego Izydora, biskupa Sewilli, Księga o herezjach*, „Warszawskie Studia Teologiczne” 1993, 6, s. 59-81.
- Iustinus Martyr, *Apologiae pro Christianis*, wyd. J.C.Th. Otto, *Corpus Apologetarum Christianorum saeculi secundi*, t. I/1, 1-243, Sändig, Wiesbaden 1969 (przedruk wyd. 3. z 1876 r.); tłum. L. Misiarczyk: Justyn Męczennik, I. i 2. *Apologia*, Biblioteka Ojców Kościoła 24, Wydawnictwo M, Kraków 2004, s. 207-284.
- Leo Magnus, *Sermones*, wyd. A. Chavasse. Corpus Christianorum Series Latina 139-138A, Brepols, Turnhout 1973; tłum. K. Tomczak: Św. Leon Wielki, *Mowy*, Pisma Ojców Kościoła 24, Księgarnia św. Wojciecha, Poznań–Warszawa–Lublin 1957.
- Maximus Confessor, *Liber asceticus*, wyd. P. Van Deun, Corpus Christianorum Series Graeca 40, Brepols, Turnhout 2000.
- Origenes, *Commentarii in Iohannem*, wyd. C. Blanc, Libri I-V, Sources Chrétiennes 120, Cerf, Paris 1966; Libri VI, X. Sources Chrétiennes 157, Cerf, Paris 1970; Liber XIII, Sources Chrétiennes 222, Cerf, Paris 1975; Libri XIX-XX, Sources Chrétiennes 290, Cerf, Paris 1982; Libri XXVIII-XXXII, Sources Chrétiennes 385, Cerf, Paris 1992; tłum. S. Kalinkowski: Orygenes, *Komentarz do Ewangelii według św. Jana*, Źródła Myśli Teologicznej 27, Wydawnictwo WAM, Kraków 2003.
- Origenes, *Contra Celsum*, wyd. M. Borret, Libri I-II, Sources Chrétiennes 132, Cerf, Paris 1967; Libri III-IV, Sources Chrétiennes 136, Cerf, Paris 1968; Libri V-VI, Sources Chrétiennes 147, Cerf, Paris 1969; Libri VII-VIII, Sources Chrétiennes 150, Cerf, Paris 1969; *Introduction et index*. Sources Chrétiennes 227, Cerf, Paris 1976; tłum. S. Kalinkowski: Orygenes, *Przeciw Celsusowi*, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1986.
- Origenes, *De principiis*, wyd. H. Crouzel, M. Simonetti, Libri I-II, Sources Chrétiennes 252-253, Cerf, Paris 1978; Libri III-IV, Sources Chrétiennes 268-269, Cerf, Paris 1980; *Compléments et index*, Sources Chrétiennes 312, Cerf, Paris 1984; tłum. S. Kalinkowski: Orygenes, *O zasadach*, Źródła Myśli Teologicznej 1, Wydawnictwo WAM, Kraków 1996.
- Origenes, *Homiliae in Ezechielem*, wyd. M. Borret, Sources Chrétiennes 352, Cerf, Paris 1989; tłum. S. Kalinkowski: Orygenes, *Homilie o Księdze Ezechiela*, Źródła Myśli Teologicznej 16, Wydawnictwo WAM, Kraków 2000, s. 69-214.
- Origenes, *Homiliae in Ieremiam*, wyd. P. Husson, P. Nautin, vol. 1, Sources Chrétiennes 232, Cerf, Paris 1976; vol. 2, Sources Chrétiennes 238, Cerf, Paris 1977; tłum. S. Kalinkowski: Orygenes, *Homilie o Księdze Jeremiasza*,

- Pisma Starochrześcijańskich Pisarzy 30, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1986, s. 23-211.
- Origenes, *Homiliae in Leviticum*, wyd. M. Borret, Sources Chrétiennes 286-287, Cerf, Paris 1981; tłum. S. Kalinkowski: Orygenes, *Homilie o Księdze Kapłańskiej*, Pisma Starochrześcijańskich Pisarzy 31/2, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1985.
- Origenes, *Homiliae in Librum primum Regnorum (Samueli I)*, wyd. P. i M.-T. Nautin, Sources Chrétiennes 328, Cerf, Paris 1986; tłum. S. Kalinkowski: Orygenes, *Homilie o Księgach Samuela i Księgach Królewskich*, Pisma Starochrześcijańskich Pisarzy 30, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1983, s. 287-319.
- Origenes, *Homiliae in Numeros*, wyd. L. Doutreleau, vol. 1, Sources Chrétiennes 415, Cerf, Paris 1996; vol. 2, Sources Chrétiennes 442, Cerf, Paris 1999; vol. 3, Sources Chrétiennes 461, Cerf, Paris 2001; tłum. S. Kalinkowski: Orygenes, *Homilie o Księdze Liczb*, Pisma Starochrześcijańskich Pisarzy 34/1, Wydawnictwo Akademii Teologii Katolickiej, Warszawa 1986.
- Tertullianus, *Adversus Praxean*, wyd. E. Evans, Corpus Christianorum Series Latina 2, Brepols, Turnhout 1954, 1157-1205; tłum. E. Buszewicz: Tertulian, *Przeciw Prakseaszowi*, Źródła Myśli Teologicznej 4, Wydawnictwo WAM, Kraków 1997, s. 35-86.
- Theodoretus Cyrensis, *Haereticarum fabularum compendium*, wyd. J.-P. Migne, Patrologia Graeca 83, Petit-Montrouge 335-556, Paris 1864; tłum. P.M. Szewczyk: Teodoret z Cyru, *O herezjach*. Źródła Myśli Teologicznej 77, Wydawnictwo WAM, Kraków 2016.

#### Opracowania

- Balthasar H.U. von, *Présence et pensée. Essai sur la philosophie religieuse de Grégoire de Nyse*, Beauchesne, Paris 1988.
- Balthasar H.U. von, *Wstęp*, w: Orygenes, *Duch i ogień*, wybór tekstów i wprowadzenie H. Urs von Balthasar, tłum. S. Kalinkowski, Biblioteka Ojców Kościoła 4, Wydawnictwo M – Wydawnictwo Sióstr Loretanek, Kraków–Warszawa 1995, s. 7-28.
- Bardy G., *L'inspiration des Pères de l'Eglise*, „Recherches de Science Religieuse” 1951-1952, 40, s. 7-26.
- Barth K., *Dogmatique*, vol. 1: *La doctrine de la Parole de Dieu. Prolegomènes à la Dogmatique*, Éditions Labor et Fides, Genève 1953.
- Bauer W., *Rechtgläubigkeit und Ketzerei im ältesten Christentum*. Beiträge zur historischen Theologie 10, Mohr Siebeck, Tübingen 1964.
- Blowers P.M., *The „Regula Fidei” and the Narrative Character of Early Christian Faith*, „Pro Ecclesia” 1997, 6, s. 199-228.
- Boulluec A. Le, *La notion d'hérésie dans la littérature grecque IIe-IIIe siècles*, t. 1-2, Études Augustiniennes, Paris 1985

- Cantalamesa R., *Cristianesimo primitivo e filosofia greca*, w: *Il cristianesimo e le filosofie*, red. R. Cantalamessa, Vita e pensiero, Milano 1971, s. 26-57.
- Chadwick H., *Mysł wczesnochrześcijańska a tradycja klasyczna*, tłum. P. Siczkowski, W drodze, Poznań 2000.
- Daniélou J., *L'unité des deux Testaments dans l'oeuvre d'Origène*, „Revue des Sciences Religieuses” 1948, 22, s. 27-56.
- Daniélou J., *Les divers sens de l'Écriture dans la tradition chrétienne primitive*, „Ephemerides Theologicae Lovanienses” 1948, 24, s. 119-126.
- Daniélou J., *Les orientations présentes de la pensée religieuse*, „Études” 1946, 249, s. 5-21.
- Daniélou J., *Message évangélique et culture hellénistique aux IIe et IIIe siècles*, Desclée, Tournai 1961.
- Daniélou J., *Philon d'Alexandrie*, Fayard, Paris 1958.
- Daniélou J., *Sacramentum Futuri. Études sur les origines de la typologie biblique*, Beauchesne, Paris 1950.
- Daniélou J., *Teologia judeochrześcijańska*, tłum. S. Basista, *Mysł Teologiczna* 39, Wydawnictwo WAM, Kraków 2002.
- Daniélou J., *Typologie et allégorie chez Clement d'Alexandrie*, „Studia Patristica” 1961, 4, s. 50-57.
- Dawson D., *Allegorical Readers and Cultural Revision in Ancient Alexandria*, The University of California Press, Berkeley–Los Angeles–Oxford 1992.
- Dorival G., *Les chrétiens de l'Antiquité face à la culture classique et à l'hellénisme*, „Revue des Sciences Religieuses” 2000, 74/4, s. 419-436.
- Drączkowski F., *Filozofia grecka jako „trzeci Testament”, czyli praeparatio evangelica w rozumieniu Klemensa Aleksandryjskiego*, w: *Wczesne chrześcijaństwo a religie*, red. I.S. Ledwoń, M. Szram, Wydawnictwo KUL, Lublin 2012, s. 407-424.
- Drączkowski F., *Kościół-Agape według Klemensa Aleksandryjskiego*, Redakcja Wydawnictw KUL, Lublin 1983.
- Evdokimov P., *Poznanie Boga w tradycji wschodniej. Patrystyka, liturgia, ikonografia*, tłum. A. Liduchowska, Wydawnictwo M, Kraków 1996.
- Fédou M., *Christianisme et religions païennes dans le „Contre Celse” d'Origène*, Beauchesne, Paris 1988.
- Fiedrowicz M., *Teologia Ojców Kościoła*, tłum. W. Szymona, Wydawnictwo Uniwersytetu Jagiellońskiego, Kraków 2009.
- Grzywaczewski J., *Idea trzech Testamentów Klemensa z Aleksandrii*, „Studia Nauk Teologicznych” 2016, 11, s. 89-107.
- Guinot J.-N., *La typologie comme système herméneutique*, w: *Figures de l'Ancien Testament chez les Pères*, Cahiers de Biblia Patristica 2, Centre d'analyse et de documentation patristiques, Strasbourg 1989, s. 1-34.
- Hägglund B., *Die Bedeutung der „regula fidei” als Grundlage theologischer Aussagen*, „Studia Theologica” 1958, 12, s. 1-44.

- Historia teologii*, t. 1: *Epoka patrystyczna*, red. A. di Berardino, B. Studer, tłum. M. Gołębiowski, J. Łukaszewska, J. Ryndak, P. Zarębski, Wydawnictwo M, Kraków 2003
- Ivanka E. von, *Plato Christianus. La réception critique du platonisme chez les Pères de l'Eglise*, Presses Universitaires de France, Paris 1990.
- Jaeger W., *Wczesne chrześcijaństwo i grecka paideia*, tłum. K. Bielawski, Wydawnictwo Homini, Bydgoszcz 1997.
- Kelly J.N.D., *Early Christian Creeds*, Longman, London 1972.
- Kelly J.N.D., *Początki doktryny chrześcijańskiej*, tłum. J. Mrukówna, Wydawnictwo PAX, Warszawa 1988.
- Kołosowski T., *Inkulturowanie religijnych wartości pogańskich w chrześcijaństwie w twórczości wczesnochrześcijańskich apologetów greckich. Stanowisko Atenagoras i Justyna*, w: *Wczesne chrześcijaństwo a religie*, red. I.S. Ledwoń, M. Szram, Wydawnictwo KUL, Lublin 2012, s. 319-327.
- Lampe G.W.H., *A Patristic Greek Lexicon*, Oxford University Press, Oxford 1997.
- Lubac H. de, *Sens spiritual*, „Recherches de Science Religieuse” 1949, 36, s. 542-576.
- Lubac H. de, *Typologie et Allégorisme*, „Recherches de Science Religieuse” 1947, 34, s. 180-226.
- Lubac H. de, *Histoire et esprit. L'intelligence de l'Écriture d'après Origène*, Aubier, Paris 1950.
- Moreschini C., *Storia della filosofia patristica*, Morcelliana, Brescia 2004.
- Nadolski B., *Lectio divina*, „Ruch Biblijny i Liturgiczny” 2001, 54, s. 47-51.
- Naumowicz J., *Wcielenie Boga i zbawienie człowieka. Złota reguła soteriologii patrystycznej*, „Warszawskie Studia Teologiczne” 2000, 13, s. 17-30.
- Ortodoksja, herezja, schizma w Kościele starożytnym*, red. F. Drączkowski, J. Pałucki, P. Szczur, M. Szram, Polihymnia, Lublin 2012.
- Osborn R., *Reason and the Rule of Faith in the Second Century AD*, w: *The Making of Orthodoxy: Essays in Honour of Henry Chadwick*, red. R. Williams, Cambridge University Press, Cambridge 1989, s. 42-58.
- Padovese L., *Wprowadzenie do teologii patrystycznej*, tłum. A. Baron, Myśl Teologiczna 1, Wydawnictwo WAM, Kraków 1994.
- Pałucki J., *Recepcja ideałów helleńskich w nauce Klemensa Aleksandryjskiego*, „Roczniki Teologiczne” 1994, 41/4, s. 5-27.
- Pawłowski S., *Czy istnieje „hierarchia soborów”?* *Perspektywa ekumeniczna*, w: *Przed Soborem Wszechprawosławnym*, red. T. Kałużny, Z.J. Kijas, Biblioteka Ekumenii i Dialogu 38, Wydawnictwo Uniwersytetu Papieskiego Jana Pawła II, Kraków 2016, s. 83-101.
- Pietras H., *Początki teologii Kościoła*, Myśl Teologiczna 57, Wydawnictwo WAM, Kraków 2007.
- Prestige G.L., *Dio nel pensiero dei Padri*, Società editrice il Mulino, Bologna 1969.

- Ramelli I., *The Stoic Doctrine of Oikeiosis and its Transformation in Christian Platonism*, „Apeiron. A Journal for Ancient Philosophy and Science” 2014, 47/1, s. 116-140.
- Rogich D.M., *The Development of a Theologian according to Saint Gregory the Theologian*, „The Greek Orthodox Theological Review” 1994, 39/1-2, s. 63-81.
- Rondeau M.-J., *Jean Daniélou, Henri-Irénée Marrou et le renouveau des études patristiques*, w: *Les Pères de l'Église au XXe siècle. Histoire – Littérature – Théologie. L'aventure des Sources chrétiennes*, Cerf, Paris 1997, s. 351-370.
- Runia D.T., *Filone di Alessandria nella prima letteratura Cristiana*, red. R. Radice, Collana Platonismo e filosofia patristica. Studi e testi 14. Vita e Pensiero, Milano 1999.
- Simonetti M., *Między dosłownością a alegorią. Przyczynek do historii egzegezy patrystycznej*, tłum. T. Skibiński, Myśl Teologiczna 26, Wydawnictwo WAM, Kraków 2000.
- Somos R., *Strategy of Argumentation in Origen's Contra Celsum*, „Adamantius” 2012, 18, s. 200-217.
- Spanneut M., *Le stoïcisme des Pères de l'Église de Clément de Rome à Clément d'Alexandrie*, Éditions du Seuil, Paris 1957.
- Stachura M., *Heretycy, schizmatycy i manichejczycy wobec cesarstwa rzymskiego (lata 324-428, wschodnia część Imperium)*, Towarzystwo Wydawnicze „Historia Iagiellonica”, Kraków 2000.
- Staniek E., *Koncepcja homilii patrystycznej*, „Vox Patrum” 2003, 44-45, s. 23-34.
- Stanula E., *Życie duchowe w ujęciu Orygenesy*, w: idem, *Eseje patrystyczne*, Wydawnictwo Naukowe Sub Lupa, Warszawa 2014, s. 87-100.
- Starowieyski M., *O staroziach, czyli czego możemy się nauczyć od starożytnego Kościoła*, „Warszawskie Studia Teologiczne” 2018, 31/2, s. 17-26.
- Szram M., *Aleksandryzizm w zachodniej egzegezie patrystycznej*, w: *W służbie Bogu bogatemu w miłosierdzie w przestrzeni Kościoła w Elku, Białymstoku i na Warmii. Metropolie Warmińskiej Wielkiemu Kanclerzowi Wydziału Teologii Uniwersytetu Warmińsko-Mazurskiego Jego Ekscelencji Księdzu Arcybiskupowi Doktorowi Wojciechowi Ziembie w 40 rocznicę święceń kapłańskich i 25 rocznicę święceń biskupich*, red. S. Kozakiewicz, Wydział Teologii UWM, Olsztyn 2007, s. 346-359.
- Szram M., *Chrystus – Mądrość Boża jako klucz interpretacyjny Pisma świętego w ujęciu Orygenesy*, w: *Mistrz i Przyjaciel. Księga pamiątkowa ku czci Księdza Profesora Marka Zahajkiewicza*, red. J. Pałucki, Redakcja Wydawnictw KUL, Lublin 1997, s. 225-238.
- Szram M., *Cnota pokory w nauczaniu greckich Ojców Kościoła IV wieku*, Wydawnictwo KUL, Lublin 2014.
- Szram M., *Duchowy sens liczb w alegorycznej egzegezie aleksandryjskiej (II-V w.)*, Redakcja Wydawnictw KUL, Lublin 2001.

- Szram M., *Inspiracje judeohelleńską egzegezą Filona Aleksandryjskiego w pismach św. Hieronima*, „Vox Patrum” 2012, 5, 7, s. 480-487.
- Szram M., *Jean Daniélou – odnowa teologii przez tradycję patrystyczną*, w: *Wybitni teologowie XX wieku. Krąg języka francuskiego*, red. J. Jezierski, Warmińskie Wydawnictwo Diecezjalne, Olsztyn 2004, s. 39-52.
- Szram M., *Koncepcje komentarza biblijnego w epoce patrystycznej*, „Vox Patrum” 2003, 23, t. 44-45, s. 35-48.
- Szram M., *Osobowy charakter biblijnego Słowa w rozumieniu Orygenesa*, „Verbum Vitae” 2005, 7, s. 187-200.
- Tomkiel A., *Ojcowie Kościoła uczą nas modlitwy*, Wydawnictwo Sióstr Loretańek, Warszawa 1995.
- Turek W., *Nieznajomość Pisma Świętego jest nieznajomością Chrystusa. Rola Słowa Bożego w życiu konsekrowanym na podstawie niektórych tekstów św. Hieronima*, „Warszawskie Studia Teologiczne” 2015, 28/4, s. 19-33.
- Widok N., *Akomodacja misyjna w teorii i praktyce Klemensa Aleksandryjskiego*, Wydawnictwo Św. Krzyża, Opole 1992.
- Winling R., *Teologia współczesna 1945-1980*, tłum. K. Kisielewska-Sławińska, Wydawnictwo Znak, Kraków 1990.
- Wojtczak J., *Stosunek Klemensa Aleksandryjskiego do filozofii według Stromata*, „Studia Theologica Varsaviensia” 1971, 9/1, s. 263-288.
- Wolfson H.A., *La filosofia dei Padri della Chiesa*, vol. 1: *Spirito, Trinità, Incarnazione*, Mondadori, Brescia 1978.



**Mariusz Szram** – ks. prof. dr hab., prezbiter archidiecezji warmińskiej, profesor nauk teologicznych, kierownik Katedry Patrologii Greckiej i Łacińskiej w Instytucie Historii Kościoła i Patrologii na Wydziale Teologii KUL, wykładowca patrologii i języków klasycznych, specjalista w zakresie teologii patrystycznej, szczególnie egzegezy, chrystologii i eschatologii Orygenesa i Ojców Kapadockich. Najważniejsze monografie książkowe: *Chrystus – Mądrość Boża według Orygenesa* (Lublin 1997), *Duchowy sens liczb w alegorycznej egzegezie aleksandryjskiej (II-V w.)* (Lublin 2001), *Ciało zmartwychwstałe w myśli patrystycznej przelomu II i III wieku* (Lublin 2010), *Cnota pokory w nauczaniu greckich Ojców Kościoła IV wieku* (Lublin 2014).

Ewelina Kurowicka-Roman

<http://orcid.org/0000-0002-4515-6450>

John Paul II Catholic University of Lublin

[kurowickaewelina@gmail.com](mailto:kurowickaewelina@gmail.com)

DOI: 10.35765/pk.2019.2704.05

# Christian Identity of a Teacher of Early Education in the Contemporary World

## ABSTRACT

The primary task of the teacher is to support the child in his or her overall development. The work of a teacher is also a path of Christian vocation. The article is devoted to the issue of Christian identity of early education teachers. The aim of the considerations is also to show the dimensions of such an educator's identity. The article attempts to answer the questions: who the teacher is; and what their role and calling in the modern world is. The main goal of pedagogical activity which is the comprehensive development of the child is discussed.

**KEY WORDS:** Christian identity, personal relationship, teacher, early education, upbringing

## STRESZCZENIE

*Chrześcijańska tożsamość nauczyciela nauczania początkowego we współczesnym świecie*

Podstawowym zadaniem nauczyciela jest wspieranie dziecka w jego całościowym rozwoju. Zawód nauczyciela jest szczególnego rodzaju misją i powołaniem. Artykuł poświęcono kwestii tożsamości chrześcijańskiej nauczycieli nauczania początkowego. Celem rozważań jest także pokazanie wymiarów tożsamości nauczyciela. Dokonano próby

udzielenia odpowiedzi na pytania, kim jest nauczyciel oraz jaka jest jego rola i powołanie we współczesnym świecie. Omówiono główny cel działalności pedagogicznej, jakim jest integralny rozwój dziecka.

**SŁOWA KLUCZE:** tożsamość chrześcijańska, relacja osobowa, nauczyciel, nauczanie początkowe, wychowanie

## Preface

Issues related to broadly understood identity are discussed by many researchers in various scientific discourses. It has an important place in the philosophical, theological and humanistic sciences. Reflections on structures defining the identity of an individual are in the field of interest of sociology, psychology and pedagogy. Theoretical considerations and practical conclusions related to the teacher's identity are discussed in both scientific and journalistic publications. The teaching profession belongs to professions of public trust in which building and maintaining good relationships with other people are particularly important. Jean Vanier points to two important components of Christian identity—faith and community—which are an important source of human trust in relationships with other people.<sup>1</sup> A man who has not experienced a sense of trust in life will not be able to comprehend the essence of Christianity. The relationship between a teacher and a pupil is primarily based on mutual trust, respect and acceptance. Reflection on the identity of teachers should be undertaken in the context of contemporary changes taking place in education. In the 21st century, the main dilemma of creating identity is “the lack of permanent reference points, the stability of what is identical and permanent.”<sup>2</sup> Technicization changes, pressure exerted by various institutions, new everyday experiences contribute to fragmentation and disassembly of identity.<sup>3</sup> This state of affairs almost forces a man to build and reform their identity. The discourse on identity includes searching for one's own way of becoming a teacher and self-development directing the educator to the well-being of a pupil.

1 M. Kwiatkowski, *Zaufać Innemu. Chryścijanin w świecie ryzyka*, in: *O chrześcijańską tożsamość nauczyciela tu i teraz*, ed. E. Jankiewicz, Ogólnopolskie Stowarzyszenie Nauczycieli „Warsztaty w Drodze”, Zielona Góra 2003, p. 53.

2 H. Kwiatkowska, *Tożsamość nauczycieli. Między anomią a autonomią*, Gdańskie Wydawnictwo Psychologiczne, Gdańsk 2005, p. 12.

3 A. Giddens, *Nowoczesność i tożsamość. „Ja” i społeczeństwo w epoce późnej nowoczesności*, transl. A. Szulżycka, Wydawnictwo Naukowe PWN, Warszawa 2001, p. 254.



Beginning teachers, entering the environment of their professional work, begin to identify with it and take actions to increase the quality of its functioning. Entering a school or kindergarten, young pedagogues would learn the principles and specificity of work in a specific educational institution. Conversations with experienced teachers and exchange of insights let them identify with their professional role. Shaping the teacher's identity is a lifelong process that lasts throughout the entire professional career. The necessity of continuous development is almost inscribed in the teaching profession, it is a characteristic thereof. Henryka Kwiatkowska emphasizes that the teacher's action is

the more effective, the more the teacher is subject to development processes, the more they are aware of themselves, and also aware of the fulfilment of their own professional (cognitive, fitness) needs at school, as well as the existential ones (e.g. needs recognition, autonomy).<sup>4</sup>

Therefore, the path of teacher development is constant development of one's competences, knowledge and skills.

## 1. Who is a Teacher?

Reflections on the identity of the teacher generate questions "who is a teacher?" and "what is their role and calling?" It should be emphasized that teachers play a significant role in human life at every stage of education. They show their pupils a direction of action, a path worth following. Teacher is an education subject on whom the quality of upbringing and teaching depends largely. Pre-school and early years teachers have particularly important tasks to fulfil because they shape the foundation of the personality of young children who are just beginning their first educational stage. They show such values as truth, goodness and beauty to the youngest. They also familiarize with social rules and norms and sensitize to compliance therewith. The attitude and values represented by the educator have a significant impact on their pupils. An early education teacher acts as a guide to the world of values. In the teacher's work, apart from excellent communication skills, the key is to establish a personal relationship with a pupil.<sup>5</sup> Essential characteristics of a reflective and professional

---

4 H. Kwiatkowska, *Pedeutologia*, Wydawnictwa Akademickie i Profesjonalne, Warszawa 2008, p. 207.

5 M. Mejer, *Pytania o tożsamość nauczyciela-wychowawcy w świetle badań młodzieży. Czy młodzież dzisiaj potrzebuje raczej trenera kompetencji, czy mistrza?*, "Seminare," 2015, Vol. 36, Iss. 1, p. 141.

teacher are, among others: empathy, openness to the child's needs, personal culture, optimism, rational thinking, and caring. In a teacher's activity, it is important to be guided by love for the pupil, patience, and evangelical principles. On the other hand, the lack of love (as a personal relationship) causes despair understood as the lack of personal and emotional association.<sup>6</sup> The teacher's actions are of a person-forming nature<sup>7</sup> and are expressed in concern for the well-being of a pupil.

It is important to identify with the profession, as well as the professional group of teachers. Professional identification allows to characterize an individual or group performing a specific profession. It is a process during which the teacher becomes like their professional group and also takes over its goals and behaviors.<sup>8</sup> A reflective teacher is able to think both about themselves, as well as the sense and purpose of their teaching. The following degrees of teacher identification with profession can be distinguished:

- a. comprehensive identification: occurs when the teacher considers work as the basis of their life. Correct identification is based on identifying oneself with own work to the extent that allows to notice other values, as well as allowing participation in family and social life;
- b. partial identification: it occurs when a teacher has equal attitude to the professional and personal matters;
- c. lack of identification with the profession: occurs when a teacher is associated with the profession only for financial reasons and treats the work as a source of income.<sup>9</sup>

Teacher's work consists in responsible implementation of the educational and didactic process, the essence and basic value of which is the well-being of a child.<sup>10</sup> The Holy Father John Paul II indicates that "the teacher's task is to stimulate and support the comprehensive development and improvement of pupil and student as a person with dignity."<sup>11</sup> The literature shows many beautiful quotes about the mission and calling of a teacher. In times of rapid changes, teachers face many problems and barriers in their work. However, these difficulties do not make the teacher's work less special.

6 M. Krasnodębski, *Człowiek i paideia. Realistyczne podstawy filozofii wychowania*, Wydawnictwo Szkoły Wyższej Przymierza Rodzin, Warszawa 2009, p. 182.

7 L. Dziaczkowska, *W poszukiwaniu metody pracy nauczyciela*, "Forum Pedagogiczne," 2015, Iss. 2, p. 109.

8 B. Jakimiuk, *Relacje zawodowe i osiągnięcia osobiste jako czynniki satysfakcji z pracy nauczycieli a ich indywidualne doświadczenia*, Wydawnictwo KUL, Lublin 2017, p. 52.

9 Ibidem, pp. 52-53.

10 A. Kaczmarczyk, M. Kątny, *Nauczyciel – zawód, misja czy powołanie?*, "Studia Pedagogiczne. Problemy Społeczne, Edukacyjne i Artystyczne," 2010, Iss. 19, p. 67.

11 A. Gielarowski, *Nauczyciel: zawód czy powołanie?*, "Edukacja i Religia," 2000, Iss. 1, p. 17.

## 2. The Concept of Identity

The concept of identity has a multidimensional character. Therefore, it is important to determine what kind of identity will be considered. The considerations in this study revolve around Christian identity in the teaching profession. Each human being has their own unique features that make them unique and stand out among other people. Erik Erikson calls this property identity of a human being.<sup>12</sup> It is not given to man once and for all, but undergoes changes throughout their life. According to *Słownik Języka Polskiego* [Polish Language Dictionary], identity in relation to an individual means self-awareness, while in relation to the community it means a sense of unity and awareness of common features.<sup>13</sup> Identity is temporary, which is indicated by human reflections on their own, on experiencing a sense of continuity of existence in time.<sup>14</sup> Identity formation is a dynamic process that takes place during individual stages of human development. According to Jerzy Nikitorowicz, the process of acquiring identity is

a creative effort of an individual, alleviating tensions and contradictions between fixed and inherited elements resulting from social anchoring in the family and local community, identification with significant individuals and groups, symbols and core values, and variable elements, acquired and resulting from the interaction and experience of participation in culture and social structures, assimilated and recognized norms, values and behaviors.<sup>15</sup>

People shape their identities by working on themselves, through personal development. According to Henryka Kwiatkowska, identity shows “functioning of human as an integrated system, constituting a counterpoint for external and internal forces that disturb this integrity.”<sup>16</sup> Nowadays, in the era of the information society, building one’s own identity is an important

---

12 E. Erikson, *Identity and the life cycle*, “Sociological Issues,” 1959, Iss. 1, cyt. za: L. Dyczewski, *Tożsamość religijna*, in: *Tożsamość religijna w nowoczesności*, eds. L. Dyczewski, K. Jurek, Wydawnictwo KUL, Lublin 2015, p. 9.

13 *Słownik Języka Polskiego PWN*, <https://sjp.pwn.pl/szukaj/to%C5%BCsamo%C5%9B%C4%87.html> (dostęp: 31.01.2019)

14 K. Pankowska, *Tożsamość religijna w dobie kultury popularnej*, in: *Tożsamość religijna w nowoczesności*, op. cit., p. 32.

15 J. Nikitorowicz, *Dylematy konstruowania tożsamości opiekuna-wychowawcy-nauczyciela w społeczeństwie wielokulturowym*, in: *Nauczyciel – Tożsamość – Rozwój*, eds. R. Kwiecińska, p. Kowal, M. Szymański, Wydawnictwo Naukowe Akademii Pedagogicznej, Kraków 2007, p. 22.

16 H. Kwiatkowska, *Tożsamość nauczycieli. Między anomią a autonomią*, op. cit., p. 30.

task to accomplish. The identity construct is becoming problematic in a world of rapid change.<sup>17</sup>

Religion is very important in creating a Christian identity, because it indicates norms, values and patterns of behavior and shows the meaning of life.<sup>18</sup> Religion gives man the answers to various existential situations, and also makes them strive to accomplish the good. Marek Dziewiecki emphasizes that biblical anthropology should be the starting point in the formation of the identity of a Christian teacher, because he considers human in a realistic and integral manner.<sup>19</sup> Believer relates own life to God and builds own identity in contact with other people. It should be noted that in a modern world filled with the latest technologies, religion introduces a certain order in human life. It shows the truth, sense and purpose of life. The specificity of a teacher's work requires constant improvement and self-improvement, despite encountering many obstacles and difficulties (i.e. lack of support from superiors or low pay). However, the sense of mission means that the teaching profession is not treated instrumentally, because every day in kindergarten or school is considered a beautiful adventure.<sup>20</sup>

According to Anna Brzezińska, professional identity synthesizes elements of individual and social identity. This means that it forms the whole, taking into account the uniqueness of the individual and what connects an individual through the values and rules of conduct with a professional group.<sup>21</sup> Dialectic relationship of man with the world is an inseparable foundation for building own identity, which shows what is permanent in man, and what is changeable and unique.

Professional identity relates to reflection on oneself and the work performed. Krystyna Chałas considers the teacher's identity as "competence for educational activities or in other words as a dynamic self-vision implemented in educational activities."<sup>22</sup> The identity of a modern teacher is subject to various transformations and changes. In the 21st century referred to as the "era of globalization," "postmodern era" or "era of

17 H. Kwiatkowska, *Tożsamość nauczycieli – dylematyczność relacji podmiotowość-przedmiotowość*, in: *Nauczyciel – Tożsamość – Rozwój*, op. cit., p. 65.

18 L. Dyczewski, *Tożsamość religijna*, in: *Tożsamość religijna w nowoczesności*, op. cit., p. 12.

19 M. Dziewiecki, *Tożsamość i postawa wychowawcy*, [https://opoka.org.pl/biblioteka/ID/tosamosc\\_ip\\_wychowawcy.html](https://opoka.org.pl/biblioteka/ID/tosamosc_ip_wychowawcy.html) (access: 02.02.2019).

20 A.P. Dymier, *Nauczyciel szkoły katolickiej w świetle dokumentów Kościoła*, "Pedagogika Katolicka," 2011, Iss. 8, p. 57.

21 A. Brzezińska, K. Appelt, *Tożsamość zawodowa psychologa*, in: *Etyczne dylematy psychologii*, eds. J. Brzeziński, M. Toeplitz-Winiewska, Wydawnictwo Szkoły Wyższej Psychologii Społecznej „Academica”, Warszawa 2004, pp. 13-14.

22 K. Chałas, *Jak określić tożsamość nauczyciela – ważny problem reformującej się szkoły*, "Scriptores Scholarum," 1999, Iss. 2/3, p. 182.

technocracy.”<sup>23</sup> In a world of rapid change, one should remember about education towards subjectivity, i.e. the purpose of education, which is subjective identity.<sup>24</sup> It is associated with the ability to treat pupils emphatically, to accept and understand them. Grażyna Miłkowska-Olejniczak in the publication which is the result of the Teachers’ Symposium during the 66th National Pilgrimage of Teachers and Educators in Jasna Góra, writes: “Talking about a Christian teaching identity means asking if—and to what extent—one can be a witness to own Christian values.”<sup>25</sup> This question concerns compliance and readability of the principles professed by the teacher in pedagogical work with a pupil. During the Teachers’ Symposium, some of the teachers’ needs were pointed out to highlight and emphasize Christian values:

- a. The need to speak: to talk to pupils about subjects related to Christian faith, as well as to give them an example of Christian life;
- b. The need of courage: helping a child search for values and grow in accordance with the values they believe in;
- c. The need to learn the difficult art of dialogue and love: showing pupils interest, forbearance, empathic understanding of problems;
- d. The need to teach oneself and pupils the art of talking: honest, non-judgmental, active listening to another person;
- e. The need for spiritual support: strengthening, courage to oppose indifference and evil;
- f. The need for self-improvement: willingness to open up to the needs of others.<sup>26</sup>

The pedagogical activity is complex and its goal is oriented towards supporting the child’s development. The implementation of this goal is influenced

on the one hand, formal and informal activities that take specific goals—tasks and operate rationally selected means, on the other—the activities of educators as activities that are not so much the implementation of tasks as the implementation of their own pedagogical attitude.<sup>27</sup>

The educator’s mission in a world filled with new technologies is becoming more and more difficult. In a reality dominated by digital media, moral

---

23 *Media w wychowaniu chrześcijańskim*, eds. D. Bis, A. Rynio, Wydawnictwo KUL, Lublin 2010, p. 17.

24 E. Kubiak-Szymborska, *Podmiotowość młodzieży akademickiej*, Wydawnictwo Akademii Bydgoskiej, Bydgoszcz 2003, pp. 274-275.

25 G. Miłkowska-Olejniczak, *Rozważania wokół chrześcijańskiej tożsamości nauczyciela*, in: *O chrześcijańską tożsamość nauczyciela tu i teraz*, op. cit., pp. 45-46.

26 *Ibidem*, pp. 48-50.

27 K. Olbrycht, *Współczesne obszary pedagogiki chrześcijańskiej*, “Paedagogia Christiana,” 2013, No. 1/31, p. 122.

loss occurs, therefore the correct attitude of teachers who care about the overall development of the pupils is important.

### 3. Identity Dimensions of the Teacher-Educator

Teaching profession is also a way of Christian calling. The primary task of the teacher is to support a child in its “dynamic development, shaping them as a person.”<sup>28</sup> Christian identity is expressed in faith in God, the Trinity, as well as in the pursuit of the teaching of Jesus Christ in individual and community life.<sup>29</sup> It allows man to respect his neighbor and act without harming other people. Many factors influence the formation of Christian identity. First of all, what is necessary is the “lively reference to the believer’s relationship to God in Christ,” as well as non-religious factors, i.e. following a specific tradition that leads to identifying with Christian values and truths.<sup>30</sup>

A competent educator in own actions embraces the pupil as a whole, and cares for their intellectual, physical, spiritual and emotional development. Marek Dziewiecki gives three dimensions of the identity of a responsible educator:

- a. physical identity: includes self-awareness in the aspect of one’s own body;
- b. psychological identity: manifests itself in understanding our own characteristics, as well as intellectual and emotional competences. These are all roles undertaken in social life;
- c. Christian identity (on an ontological level): concerns understanding who we are and why we exist. It discovers the sense of own secret in relation to God.<sup>31</sup>

The first two levels of identity cannot be regarded as the only determinants thereof, because the physical or mental sphere is not the whole man, but a certain way of experiencing the surrounding reality and oneself. A teacher who is guided by “the Christian vision of human, undertakes the work of their integral education with the awareness of shaping

28 J. Tarnowski, *Personalno-egzystencjalny wymiar wychowania chrześcijańskiego*, in: *Kontestacje pedagogiczne. Nadzieje, złudzenia i dylematy współczesnej pedagogiki*, ed. J. Gnitecki, Wydawnictwo Naukowe PTP, Oddział w Poznaniu, Poznań 1995, p. 73.

29 M. Składanowski, *Tożsamość chrześcijańska w wieloreligijnym świecie. Dylematy i propozycje Światowej Rady Kościołów*, “Colloquium Wydziału Nauk Humanistycznych i Społecznych,” 2015, Iss. 4, p. 216.

30 Ibidem, p. 102.

31 M. Dziewiecki, *Tożsamość i postawa wychowawcy*, op. cit.

the foundation for their entire life.”<sup>32</sup> In addition to developing the child’s intellectual sphere, it is important to ensure the harmonious development of other spheres of their life. According to Marian Nowak, education is “a realistic consideration of human in their uniqueness, originality, as intended and created by God.”<sup>33</sup> Teachers should have the ability to choose appropriate methods and means of education to make them aware and responsible. A good teacher should be competent both in intellectual mediation, i.e. facilitating the pupils’ understanding of the surrounding reality, and in emotional formation characterized by the fascination of the pupils with good, truth and beauty.<sup>34</sup>

## Summary

The subject of the teacher’s identity is necessary and current. It is a category shaped by human in the lifelong process. The basic element of pedagogical activities is to learn and understand the individual needs of a child, as well as the reflective basis of the educator towards himself and the external environment. In this context, attention should be paid to the need for permanent professional development and improvement of educational skills. In the modern world there is a need to synthesize the ability to transfer knowledge with an authentic personal relationship between the teacher and the pupil.<sup>35</sup> Focusing on the child’s difficulties and devoting time to him or her leads to strengthening this relationship.

The expansion of new technologies, social changes and many other factors are the reasons why in a consumerism-oriented world people are encouraged to think about the world of things. It is worth referring to the words of John Paul II, who appealed: “Contrary to all the mirages of an easier life, you must demand from yourselves. It is what means «more to be».”<sup>36</sup> A good teacher sets their own goals, but also mobilizes the pupils to do good. The educator, by own example, teaches pupils to distinguish between good and evil, to make the right choices and to be guided by the values resulting from learning moral principles and truths of faith.

---

32 M. Opiela, *Tożsamość przedszkola katolickiego*, in: *Katolickie wychowanie dziecka. Rodzina, przedszkole, Kościół*, eds. A. Kiciński, M. Opiela, Wydawnictwo KUL, Lublin 2016, p. 83.

33 M. Nowak, *Tożsamość pedagogiki chrześcijańskiej*, “Paedagogia Christiana,” 2013, Iss. 1/31, p. 44.

34 M. Dziewiecki, *Tożsamość i postawa wychowawcy*, op. cit.

35 M. Mejer, *Pytania o tożsamość nauczyciela-wychowawcy*, op. cit., p. 150.

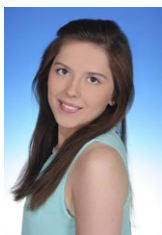
36 John Paul II, Homily during the liturgy of the word to young people gathered at Westerplatte (Gdańsk, 12.06.1987).

## BIBLIOGRAPHY

- Brzezińska A., Appelt K., *Tożsamość zawodowa psychologa*, in: *Etyczne dylematy psychologii*, eds. J. Brzeziński, M. Toeplitz-Winiewska, Wydawnictwo Szkoły Wyższej Psychologii Społecznej "Academica," Warszawa 2004.
- Chalas K., *Jak określić tożsamość nauczyciela – ważny problem reformującej się szkoły*, "Scriptores Scholarum," 1999, No. 2/3.
- Dyczewski L., *Tożsamość religijna*, in: *Tożsamość religijna w nowoczesności*, eds. L. Dyczewski, K. Jurek, Wydawnictwo KUL, Lublin 2015.
- Dymer A.S., *Nauczyciel szkoły katolickiej w świetle dokumentów Kościoła*, "Pedagogika Katolicka," 2011, No. 8.
- Dziaczekowska L., *W poszukiwaniu metody pracy nauczyciela*, "Forum Pedagogiczne," 2015, No. 2.
- Dziewiecki M., *Tożsamość i postawa wychowawcy*, [https://opoka.org.pl/biblioteka/1/ID/tosamosc\\_ip\\_wychowawcy.html](https://opoka.org.pl/biblioteka/1/ID/tosamosc_ip_wychowawcy.html) (access: 02.02.2019).
- Erikson E., *Identity and the life cycle*, "Sociological Issues," 1959, No. 1.
- Giddens A., *Nowoczesność i tożsamość. „Ja” i społeczeństwo w epoce późnej nowoczesności*, transl. A. Szulżycka, Wydawnictwo Naukowe PWN, Warszawa 2001.
- Gielarowski A., *Nauczyciel: zawód czy powołanie?*, "Edukacja i Religia," 2000, No. 1.
- Jakimiuk B., *Relacje zawodowe i osiągnięcia osobiste jako czynniki satysfakcji z pracy nauczycieli a ich indywidualne doświadczenia*, Wydawnictwo KUL, Lublin 2017.
- Jan Paweł II, *Homily during the liturgy of the word addressed to youth gathered at Westerplatte* (Gdańsk, 12.06.1987).
- Kaczmarczyk A., Kątny M., *Nauczyciel – zawód, misja czy powołanie?*, "Studia Pedagogiczne. Problemy Społeczne, Edukacyjne i Artystyczne," 2010, No. 19.
- Krasnodębski M., *Człowiek i paideia. Realistyczne podstawy filozofii wychowania*, Wydawnictwo Szkoły Wyższej Przymierza Rodzin, Warszawa 2009.
- Kubiak-Szyborska E., *Podmiotowość młodzieży akademickiej*, Wydawnictwo Akademii Bydgoskiej, Bydgoszcz 2003.
- Kwiatkowska H., *Pedeutologia*, Wydawnictwa Akademickie i Profesjonalne, Warszawa 2008.
- Kwiatkowska H., *Tożsamość nauczycieli – dylematyczność relacji podmiotowość – przedmiotowość*, in: *Nauczyciel – Tożsamość – Rozwój*, eds. R. Kwiecińska, S. Kowal, M. Szymański, Wydawnictwo Naukowe Akademii Pedagogicznej, Kraków 2007.
- Kwiatkowska H., *Tożsamość nauczycieli. Między anomią a autonomią*, Gdańskie Wydawnictwo Psychologiczne, Gdańsk 2005.
- Kwiatkowski M., *Zaufać Innemu. Chryścijanin w świecie ryzyka*, in: *O chrześcijańską tożsamość nauczyciela tu i teraz*, ed. E. Jankiewicz, Ogólnopolskie Stowarzyszenie Nauczycieli "Warsztaty w Drodze," Zielona Góra 2003.



- Media w wychowaniu chrześcijańskim*, eds. D. Bis, A. Rynio, KUL, Lublin 2010.
- Mejer M., *Pytania o tożsamość nauczyciela-wychowawcy w świetle badań młodzieży. Czy młodzież dzisiaj potrzebuje raczej trenera kompetencji, czy mistrza?*, "Seminare" 2015, Vol. 36, No. 1.
- Miłkowska-Olejniczak G., *Rozważania wokół chrześcijańskiej tożsamości nauczyciela*, in: *O chrześcijańską tożsamość nauczyciela tu i teraz*, ed. A. Jankiewicz, Ogólnopolskie Stowarzyszenie Nauczycieli „Warsztaty w Drodze”, Zielona Góra 2003.
- Nikitorowicz J., *Dylematy konstruowania tożsamości opiekuna-wychowawcy-nauczyciela w społeczeństwie wielokulturowym*, in: *Nauczyciel – Tożsamość – Rozwój*, eds. R. Kwiecińska, S. Kowal, M. Szymański, Wydawnictwo Naukowe Akademii Pedagogicznej, Kraków 2007.
- Nowak M., *Tożsamość pedagogiki chrześcijańskiej*, "Paedagogia Christiana," 2013, No. 1/31.
- Olbrycht K., *Współczesne obszary pedagogiki chrześcijańskiej*, "Paedagogia Christiana," 2013, No. 1/31.
- Opiela M., *Tożsamość przedszkola katolickiego*, in: *Katolickie wychowanie dziecka. Rodzina, przedszkole, Kościół*, eds. A. Kiciński, M. Opiela, Wydawnictwo KUL, Lublin 2016.
- Pankowska K., *Tożsamość religijna w dobie kultury popularnej*, in: *Tożsamość religijna w nowoczesności*, eds. L. Dyczewski, K. Jurek, Wydawnictwo KUL, Lublin 2015.
- Składanowski M., *Tożsamość chrześcijańska w wieloreligijnym świecie. Dylematy i propozycje Światowej Rady Kościołów*, "Colloquium Wydziału Nauk Humanistycznych i Społecznych," 2015, No. 4.
- Słownik Języka Polskiego PWN*, <https://sjp.pwn.pl/szukaj/to%5BC5%BCsamo%5C%9B%4%87.html> (access: 31.01.2019).
- Tarnowski J., *Personalno-egzystencjalny wymiar wychowania chrześcijańskiego*, in: *Kontestacje pedagogiczne. Nadzieje, złudzenia i dylematy współczesnej pedagogiki*, ed. J. Gnitecki, Wydawnictwo Naukowe PTP, Oddział w Poznaniu, Poznań 1995.



**Ewelina Kurowicka-Roman**—holds MA in Pedagogy and works as a kindergarten teacher. PhD student at the Faculty of Social Sciences of the John Paul II Catholic University of Lublin. Author of the monograph titled *Cyfrizacja przestrzeni we wczesnej edukacji. Szanse i zagrożenia*. Participant of national and international conferences and author of scientific articles. Her scientific and research interests revolve around pre-school pedagogy, social and emotional competences, integral upbringing and child development.



**Kamil Roman**

<http://orcid.org/0000-0002-5028-6911>

The John Paul II Catholic University of Lublin

[kamil.roman@kul.lublin.pl](mailto:kamil.roman@kul.lublin.pl)

DOI: 10.35765/pk.2019.2704.06

# Shaping the National Identity of the Youth in the Polish Scouting Association (ZHP)

---

## ABSTRACT

Studies on patriotism and national identity occupy a special place in the social sciences related to the comprehensive and integral development of the human person. The shaping of national identity in Poland is particularly important due to the recently celebrated 100th anniversary of independence. An important role in this process has been played by social organizations, whose members take care of maintaining and cultivating the Polish tradition. One of such organizations has been the Polish Scouting Association (ZHP), founded in 1918. The aim of the paper is to show the positive role of ZHP in building national identity and shaping the patriotic attitudes of contemporary youth. This goal will be verified through a systematic review of literature related to identity, patriotism and patriotic education. The article also contains an overview of initiatives related to shaping the patriotic identity in the Polish Scouting Association.

**KEY WORDS:** identity, national identity, patriotism, education, patriotic education

## STRESZCZENIE

*Kształtowanie tożsamości narodowej młodzieży w Związku Harcerstwa Polskiego (ZHP)*

Badania dotyczące patriotyzmu i tożsamości narodowej zajmują wyjątkowe miejsce w naukach społecznych związanych z wszechstronnym i integralnym rozwojem osoby ludzkiej. Kształtowanie tożsamości narodowej w Polsce jest szczególnie ważne ze względu na niedawno obchodzoną setną rocznicę niepodległości. Istotną rolę w tym procesie odegrały organizacje o charakterze społecznym, których członkowie dbali o utrzymanie i kultywowanie polskiej tradycji.

Jedną z takich organizacji było Polskie Stowarzyszenie Harcerstwa założone w 1918 r. Celem pracy jest ukazanie pozytywnej roli ZHP w budowaniu tożsamości narodowej i kształtowaniu postaw patriotycznych współczesnej młodzieży. Cel ten zostanie zweryfikowany poprzez systematyczny przegląd literatury związanej z tożsamością, patriotyzmem i edukacją patriotyczną. Artykuł zawiera także przegląd inicjatyw dotyczących kształtowania tożsamości patriotycznej w Związku Harcerstwa Polskiego.

**SŁOWA KLUCZE:** tożsamość, tożsamość narodowa, patriotyzm, wychowanie patriotyczne

## Introduction

Patriotism and patriotic upbringing are concepts that are the subject of research by many contemporary researchers. They occupy a special place in the development of social sciences related to the comprehensive and integral development of the human person. The shaping of national identity in Poland is particularly important due to the recently celebrated 100th anniversary of independence. Our homeland in its history went through many ups and downs. The shared history, tradition and customs were the bond that united the nation in particularly difficult moments such as the times of the partitions or the World Wars. Poles, despite many years of occupation and loss of sovereignty, sought to preserve their national identity, i.e. the sense of distinctiveness and belonging to the Polish Nation accompanied by the pride of being a Pole. An important role in this process has been played by social organizations, whose members take care of

maintaining and cultivating the Polish tradition. One of such organizations has been the Polish Scouting Association (ZHP) founded in 1918.

The aim of the paper is to show the positive role of ZHP in building national identity and shaping the patriotic attitudes of contemporary youth. This goal will be verified through a systematic review of literature related to identity, patriotism and patriotic education.

## 1. The concept of national identity

The concept of identity was originally one of the concepts used mainly in psychology, where the term identity and sense of identity are distinguished. The notion of identity in psychology is related to the perception of the observer and refers to the characteristics of a person, which the person's environment considers important, while the sense of identity includes the inner perception of the person, i.e. his or her own perception of himself or herself.<sup>1</sup>

Analyzing the notion of identity in scientific discourse, it should be stated that the desire of people to self-determine, to distinguish themselves from others are known and common phenomena. However, different concepts were used to describe these processes of identity formation, such as: belonging, group awareness, national awareness, nationality, culture, or national character.<sup>2</sup> Currently, these terms are often collectively replaced by the notion of identity, which in some way may impair the clarity of the researcher's communication.

Among the different types of identities, we can also distinguish the one related to the need to belong to a given nation. National identity can be defined as a sense of distinctiveness from other nations, shaped by factors such as language, territory, the history of a nation, awareness of its origin, and culture.<sup>3</sup>

The characteristic elements that make up national identity can include:

- national cultural heritage,
- the permanent and conscious distinctiveness of people living in a given territory,

---

1 A. Pilarska, *Wokół pojęcia poczucia tożsamości: przegląd problemów i propozycja konceptualizacji*, "Nauka," 2016, 2, pp. 126-127.

2 Z. Ciosek, *Odkrywanie tożsamości narodowej poprzez badanie dyskursu medialnego*, "Łódzkie Studia Teologiczne," 2014, Vol. 23, 1, p. 11.

3 O. Narvois, *Tożsamość narodowa a cechy osobowości młodych Polaków mieszkających na Litwie*, "Studia z Psychologii w KUL," 2011, Vol. 17, eds. O. Gorbaniuk, B. Kostrubiec-Wojtachnio, D. Musiał, M. Wiechetek, A. Błachnio, A. Przepiórka, p. 86.

- common language,
- unique customs and habits,
- emblems and symbols preserving the memory of the nation.<sup>4</sup>

The analysis of an individual's national identity requires that a person, through self-determination, distinguishes the characteristics, values and norms of behavior that differentiate him or her from others. This means that one needs to ask a question: "What does it mean to be Polish?"

They can be answered on the basis of historical knowledge, knowledge of important Polish figures, customs or culture.

The concept of national identity has two main aspects. The former is about cultivating the memory of one's own past and consciously anticipating the future, which creates a sense of continuity of existence, and the latter is about perceiving one's own otherness and differences between the "us" and "them" categories. This limit that allows us to distinguish between the two categories refers to the culture of a nation, and it is also connected with its history, art or language. The role of these nation-building factors is to unite people around common values, customs, which in a way helps to build national identity. The positive expression of national identity is patriotism and the negative is chauvinism.<sup>5</sup> National identity can also lead to the integration of members of the national community; it facilitates the formation of relationships, which often is a prerequisite for survival in times of national or social emergency, such as genocide, discrimination or attempts at denationalization.<sup>6</sup> National identity is also an important factor in the satisfaction of human needs. One of the most important human needs according to Maslow's hierarchy of needs is the need to belong. The human being needs to be part of a larger group, a community, because it affects his or her sense of security. Without a sense of security, the human person cannot fully exercise their other needs, of acceptance, respect and recognition in the eyes of others.

The phenomenon of globalization can be considered as a contemporary threat to the formation of national identity, which affects the blurring of borders and differences between individual nations.

In the era of globalization, however, national identity still exists because humanity needs to continue to have a sense of rootedness and belonging

---

4 K. Łastaski, *Historyczne i współczesne wartości polskiej tożsamości narodowej*, "Słupskie Studia Historyczne," 2007, 13, p. 281.

5 E. Kornacka-Skwara, *Tożsamość narodowa w świetle przemian kulturowych*, "Prace Naukowe AJD. Pedagogika," 2011, 20, p. 113.

6 P. Siuda, *Rola Internetu w budowaniu tożsamości narodowej*, in: *Rola informatyki w naukach ekonomicznych i społecznych*, ed. K. Grysa, Zeszyty Naukowe – Wyższa Szkoła Handlowa im. Bolesława Markowskiego w Kielcach, Kielce 2007, Iss. 4, p. 219.

to the nation.<sup>7</sup> It is difficult for a person to identify himself or /herself with a group larger than a nation. Usually, one identifies better at the level of smaller communities such as family, school, parish or local community. Identity can be successfully developed in scout groups, which form tight-knit communities related to each other by professed ideals, coherent educational program based on God and Fatherland and cooperation between members of the community.

## 2. The notion of patriotism and patriotic education

The term “patriotism” may be derived from the Greek word *patriotes*, which in free translation means a compatriot, a citizen, as well as from Latin *patria*, which means homeland and *pater* for father.<sup>8</sup> Historical understanding of the concept of patriotism recognized, therefore, issues of patrimony, that inherited from ancestors, heritage, transmitted from generation to generation. The Catholic Church in its document *The Christian Shape of Patriotism*, draws attention to its universal dimension. The idea of patriotism is deeply inscribed in the commandment of love and intergenerational solidarity, responsibility for others, willingness to serve and dedicate oneself to the common good inherent in patriotism is closely connected with the realization of the message of the Gospel.<sup>9</sup>

John Paul II also drew attention to the important role of patriotism. The Holy Father pointed out that Homeland is a heritage, and at the same time it is the possessions that are due to this heritage, including land territory, but even more values and spiritual content, that make up the culture of the nation.<sup>10</sup>

On the other hand, he would say that patriotism is the love of what is native: a love of history, tradition, language or the native landscape. It is a kind of love, which also includes the works of one’s countrymen and the fruits of their genius.<sup>11</sup>

In the opinion of John Paul II, a nation is a community which finds its homeland in a particular place in the world and which stands out among

---

7 Ibidem, p. 221.

8 L. Baran, *Jaką duch w zdrowych ciałach. System aksjonormatywy członków związku strzeleckiego „Strzelec” Józefa Piłsudskiego*, “Rocznik Bezpieczeństwa Międzynarodowego,” Vol. 12, 1, 2018, p. 186.

9 Polish Bishops’ Conference, *Chrześcijański kształt patriotyzmu*, TUM, Wrocław 2017, p. 9.

10 Jan Paweł II, *Pamięć i tożsamość*, Wydawnictwo Znak, Kraków 2005, p. 66.

11 Ibidem, p. 71.

others with its own culture. In terms of Catholic social teaching, the nation and the family are natural collectives, which means they are irreplaceable.<sup>12</sup>

As the Rector of the John Paul II Catholic University of Lublin, Antoni Dębiński, points out in his letter, homeland and patriotism are elementary and fundamental notions that every person understands in an individual way. Antoni Dębiński notes that patriotism can be seen as an authentic expression of love, and like any love, marital or parental, always involves making some sacrifices; the need to have a homeland, in turn, is a natural need of every human being; when unsatisfied, it leaves a void in the human heart and the human life.<sup>13</sup>

Patriotism assumes the existence of a specific person who is a patriot and manifests an attitude of patriotism.<sup>14</sup> This may be someone who is part of a larger community and identifying with it, as well as the whole group. Such communities may also include scouting organizations, which shape the love for the homeland in their members through their activities and cultivate the memory of Polish culture, history or customs.

In literature, patriotic education is defined in various ways, which is also often called civic, national or state education. For the purposes of this work, Wincenty Okoń's definition of patriotic education has been adopted, which defines patriotic upbringing as

upbringing aimed at the best possible preparation of the adolescent generations for the service of their own people and country, consisting in shaping, through the various activities of the educators and pupils, a commitment to their home country, its past and present, and, to a greater extent, a sense of responsibility for its multilateral development and future place among other countries.

The main goal of patriotic education is to prepare the pupils for the service of their own nation and state, to shape their attachment and love for their home country of past, future and present by being ready to defend it and act for its security.<sup>15</sup> In patriotic upbringing, great importance is attached to education, through which young people have the opportunity to broaden

12 Ibidem, pp. 74-75.

13 A. Dębiński, *Słowo Rektora Katolickiego Uniwersytetu Lubelskiego Jana Pawła II z okazji świąt Bożego Narodzenia*, Lublin 2013, p. 2, [http://diecezja.kielce.pl/sites/default/files/list\\_rektora\\_kul\\_-\\_bn2013.pdf](http://diecezja.kielce.pl/sites/default/files/list_rektora_kul_-_bn2013.pdf) (access: 05.03.2019).

14 M. Nowak, *Kryzys wartości czy kryzys człowieka w XXI wieku?*, in: *Ku życiu wartościowemu. Idee – koncepcje – praktyki*, Vol. 1, eds. M. Czerepaniak-Walczak, J. Madalińska-Michalak, B. Śliwerski, Impuls, Kraków 2018, p. 95.

15 A. Kołodziej, *Problematyka patriotyzmu w wychowaniu harcerskim w Związku Harcerstwa Rzeczypospolitej (ZHR)*, "Biuletyn Historii Wychowania," 2013, 30, pp. 136-137.



their knowledge of their own nation, learn about its history, culture and profiles of national heroes important for its development.

### 3. Patriotic education in scouting organizations

In historical terms, the prototype of today's Polish scouting is the international scouting movement. Every year on February 22nd, World Thinking Day is celebrated in honor of the scouting creator Robert Baden-Powell.

Scouting came to Poland before the First World War. It was a time when Poland was under occupation. It was the time of the struggle for independence in Poland, regaining the lost statehood. The scouts actively joined in regaining independence as part of the independence movement.

The role of scouting organizations in the upbringing process can manifest itself through:

- awareness, manifestation and strengthening the new, deeper interests;
- meeting the mental and psychological needs, such as ambition, job satisfaction, sense of belonging and affiliation in a group;
- The possibility of self-development and realization of one's own ideas, creation of new quality interpersonal bonds, shaping life resourcefulness;
- shaping the attitudes of respect towards other people based on moral principles and norms of social order;
- shaping consistency, resourcefulness and honesty in daily life;
- developing group work skills;
- building respect the work of others.<sup>16</sup>

Scouting plays an important role in the upbringing of the young generation, taking care of its comprehensive development. From a pedagogical perspective, the role of scouting organizations is manifested in the upbringing of creative, active people who are coherent in their attitudes and show exemplary civic attitudes.<sup>17</sup> Scouting organizations want to raise their members as wise and responsible citizens who will take care of their homeland and its members.

In patriotic upbringing, a large role was played by the newly founded (in 1918) Polish Scouting Association (*Związek Harcerstwa Polskiego*), abbreviated to ZHP. This organization formed from the combination of all the other groups of Polish Scouting. The scouts made an active

---

16 J. Kurzępa, *Rola organizacji harcerskich w budowaniu społeczeństwa obywatelskiego*, "Rocznik Lubuski," Vol. XXIX, 2003, p. 291.

17 *Ibidem*.

contribution to Poland regaining its independence. We can mention here, for example, the heroism of the defenders of L'viv (the L'viv Eaglets), the Polish-Bolshevik war or in plebiscites concerning the final determination of the borders of the Republic of Poland after the First World War.

The main goals of the Polish Scouting Association are focused on:

- creating conditions for comprehensive human development in the intellectual, social, spiritual, emotional and physical sphere;
- development of responsibility among scouts while retaining their rights to freedom of dignity including freedom from any addiction;
- to promote and strengthen the attachment of society to values such as truth, justice, democracy, self-government, equality, tolerance and friendship;
- creating opportunities to establish and strengthen human bonds across national, religious and racial divides;
- dissemination of knowledge about the world of nature, concern for its welfare and opposing the negative effects of human activity.<sup>18</sup>

ZHP's patriotic activities were included in the scouting law, adopted by order of ZHP Chieftaincies in 1919, which after minor modifications in the years 1930-1932 took the following form:

1. A scout serves God and Poland and conscientiously fulfills his duties
2. Rely on a scout's word as if it were *Zawisza*.
3. A scout is useful and helps others.
4. A scout sees a fellow in everyone, and considers every other scout a brother.
5. A scout acts chivalrously.
6. A scout loves nature and strives to learn about it.
7. A scout is law-abiding and obedient to his parents and all his superiors.
8. A scout is always cheerful.
9. A scout is thrifty and generous.
10. A scout is pure in thought, speech and deed, does not smoke, does not drink alcoholic beverages.<sup>19</sup>

Analyzing the above "decatalogue" of the scouts one can say that patriotic values, service to the homeland and shaping appropriate moral virtues among the pupils based on faith in God were the main domain of ZHP. The scouting model of youth upbringing is based on shaping an attitude

18 M. Banach, *Wychowanie patriotyczne w harcerstwie*, in: R. Ceglarek, *Wartość patriotyzmu w edukacji szkolnej*, Scriptum, Kraków 2011, p. 13.

19 A. Ogrocka, *Komentarze do Prawa i Przyrzeczenia Harcerskiego Oraz Kodeksu Wędrowniczego*, Materiał dla drużynowych, p. 4, [http://cieszyn.Zhp.pl/download/PiP\\_historia.doc](http://cieszyn.Zhp.pl/download/PiP_historia.doc) (access: 06.03.2019).

of kindness towards other people, responsibility for the other person, and permanent and independent pursuit of the goal.<sup>20</sup> The role and tasks of the scout are currently subject to constant change and transformation. The way the educational system in scouting was constantly changing, adapting to changing political, economic and social conditions.<sup>21</sup>

After Poland regained independence, the scouting activity focused on supporting the building of the Polish state, developing the key features of the nation based on Christian ethics and service to God and the Homeland. This movement was initially paramilitary and became an important support for the struggle for independence. During World War II, the scouts took an active part in the defense of their homeland, and during the occupation period they were active in the underground under the code name of “Grey Ranks.”<sup>22</sup> During this time, young people in addition to armed resistance against the Germans also participated in secret education where they learned about Polish history, art or literature.

Patriotic activity was also conducted by scout organizations operating in the rural environment. One such organization was the Rural Youth Union (ZMW) created in 1928 by Ignacy Solarz, a Polish pedagogue. The aim was to disseminate ZMW activities for spiritual growth and economic development of rural youth and foster patriotism among them.<sup>23</sup>

After World War II, Poland retained its statehood, but became a subsidiary of the state of the Soviet Union. At that time, the new communist government conducted propaganda activities, which also included the education and upbringing of young Poles.

The message also contained an ideological agenda of the Polish youth organizations. In the text of the scouting law for the Polish Scouting Association the duty to serve the People’s Republic was added. After World War II, not all members of the Polish Scouting Association wanted to pursue a socialist vision of scouting. People who wanted to work in scouting free from ideological lies resorted to conspiracy. In the post-war period, apart from the legally existing ZHP in Poland, numerous secret organizations gathering young people were established, which referred to the tradition of scouting from the Second Polish Republic.

---

20 E. Cieciera, *Wpływ metody harcerskiej na funkcjonowanie społeczne dzieci niepełnosprawnych*, “Student Niepełnosprawny: szkice i rozprawy,” 2017, 1, p. 248.

21 A. Kołodziej, *Problematyka patriotyzmu*, op. cit., p. 142.

22 *Historia Harcerstwa*, Związek Harcerstwa Polskiego website, <https://zhp.pl/ozhp/historia-harcerstwa> (access: 06.03.2019).

23 P. Trojanowski, *Czasopismo Znicz (Kraków, 1930-1939)*, “Annales Academiae Paedagogicae Cracoviensis, Folia 47 Studia ad Bibliothecarum Scientiam Pertinentia,” V, 2007, p. 82

In defense of their scouting identity, young people carried out various forms of opposition, starting with self-education, self-study or propaganda activities, consisting of fighting to preserve Polish culture, national tradition and ultimately sabotage or diversion.<sup>24</sup>

The aim of this type of organization was to become independent from the Soviet influence. The educational model implemented in secret scouting organizations was in opposition to the activities implemented by the state. It was based on models of patriotic struggle for independence, freedom and free Polish state.<sup>25</sup> Activities of these scout organizations was based on Christian ethics and patriotic values. During the struggle against the opposition, the authorities of the People's Republic of Poland wanted to accept the rightness of their actions by appearing as a patriotic-oriented authority and building a socialist state together.<sup>26</sup>

Despite political turmoil over the years, the main ideals of upbringing in ZHP have remained the same and are based on the following principles:

1. The principle of naturalness, i.e. a young person's behavior in accordance with their own character, temperament and way of being.
2. The principle of influencing the outside, i.e. education based on individual abilities, needs and expectations of each ZHP member, which is to support the individual development of each young scout.
3. The principle of voluntary service and awareness of the goals.
4. The principle of indirect influence, based on the interaction between members of the scouting community, mutual learning from each other, shaping patterns of proper conduct through careful observation of older colleagues.
5. The principle of a positive impact.
6. The principle of reciprocal influence: the instructor affects the younger scouts as much as they affect him or her. It is associated with self-education and the principle of brotherhood and mutual assistance.<sup>27</sup>

In accordance with the accepted principles of education, the aim of ZHP is bringing up wise, responsible citizens who are able to make sacrifices and help other people. Through mutual work and cooperation in scout groups, the young people interact with each other, learning together on the basis of fraternity and mutual help.

---

24 E. Rzeczkowska, *Tajne organizacje harcerskie w Polsce w latach 1944-1956*, "Pamięć i Sprawiedliwość," 1, 2011, p. 121.

25 Ibidem, p. 125.

26 B. Wagner, *Strategia wychowawcza w PRL*, Neritom, Warszawa, 2018, p. 194

27 M. Banach, *Wychowanie patriotyczne w harcerstwie*, op. cit., pp. 23-24.

#### 4. Examples of good practice in patriotic education in scouting organizations

As part of the “ZHP: Peer of Independence” Program, the Kujawsko-Pomorskie Scouting Association organized an event related to the double anniversary of 100 years of regaining independence and the 100th anniversary of the Polish Scouting Association. The celebrations included a number of initiatives related to patriotic, physical, social, cultural or spiritual education.<sup>28</sup>

As part of their patriotic upbringing, the scouts organized a historical exhibition entitled “Scouting as a Peer of Independence.” Another initiative was the Map for Independence, where places important for the inhabitants of the province were marked. Another program proposal was “On the Kujawsko-Pomorskie trail of the history of ZHP” (rewarded with a badge of “Scout = Citizen”), which allowed to teach the history of ZHP. As part of the celebrations, a program offer was also prepared for schools called “Scout to be,” where there were ready-made outlines of educational activities and history lessons using forms of scouts’ work. The scouts celebrated the 100th anniversary of regaining independence also by taking part in celebrations of state holidays (Flag Day, May 3rd Constitution Day, National Independence Day).

Scout troops also undertake a number of other initiatives in their local communities, which are an expression of patriotism. The scouts from the ZHP “Podlasie” Troop in Siedlce actively participate in government ceremonies such as the anniversary of the outbreak of World War II or the anniversary of the local event “Battle of Iganie.” As part of their social activities, the scouts also run a socio-educational project entitled *The Siedlce Map of Life*, which aims to expand the knowledge of residents in the field of medical first aid.<sup>29</sup>

As part of the “Relay of Remembrance for the 100th Anniversary of Independence,” scouts from ZHP Sandomierz take initiatives to honor local war heroes connected with their region.

Scouts from all over Poland took a patriotic initiative to break the Guinness record in creating the world’s largest live Polish flag. It was formed by 12,000 people dressed in red and white colors at the Polish Scouting Association rally.

---

28 *ZHP Rówieśnik Niepodległej*, Chorągiew Kujawsko-Pomorska ZHP, [https://kujawskopomorskie.pl/pliki/2018/wiadomosci/20180116\\_harcerstwo/Program-ZHPPdf](https://kujawskopomorskie.pl/pliki/2018/wiadomosci/20180116_harcerstwo/Program-ZHPPdf) (access: 06.03.2019).

29 The ZHP Podlasie Troop in Siedlce website, <http://siedlce.zhp.pl/siedleckamapazycia> (access: 06.03.2019).

Another initiative in the field of development of patriotism is the “Fellowship of Independence.”<sup>30</sup>

It is a program to be implemented within troops and other scout groups in order to arouse curiosity about the surrounding world, strengthen patriotic attitudes or raise civic awareness and the needs related to cultivating the memory of ancestors who gave their lives for a free Homeland.

The scouts strengthen their respect for national symbols and traditions, broaden their knowledge of the history of regaining independence and engage in the life of the local community.

ZHP has organized outdoor games for the shaping of national identity. One such initiative was the “Big Game,” which lasted eight months and during each of these periods, participants had a different task to complete.<sup>31</sup> Through the outdoor game, scouts had the opportunity to see places connected with the history of Poland and the Polish Scouting Association. This type of activity taught scouts thinking outside the box, stimulate creativity, teach group cooperation and positive competition.

Troops of the Jaktorów ZHP chieftaincy regularly take part in AK Rally to get to know the fates of the soldiers of the “Kampinos” partisan group and better feel the atmosphere of the struggle for Polish independence.<sup>32</sup>

In 2011, ZHP carried out an initiative titled *the future of the Polish Scouting Association*. The project focused on issues related to regional identity. Its main aim was to help residents in discovering and deepening the sense of their ties with the region.

As part of its activities, each scout group chose a region they will represent. Each unit implements the activities as planned, which are directed outwards, the effect of which is to make the population aware that they are residents of a given region and to show them the common local values.<sup>33</sup> These values are the shared history, nature, language, memory sites, important historical figures, regional cuisine, local folklore or regional stereotypes.

Scouting organizations shape their national identity through film making.

In the “Poland is Cool” film competition, scouts had to prepare a short video, whose aim was to create a positive image of Poland and Poles.<sup>34</sup> On

30 *Centralny Bank Pomysłów ZHP*, <http://cbp.zhp.pl/kierunki/radosny-patriotyzm/> (access: 07.03.2019).

31 *Ibidem*.

32 The ZHP Jaktorów Troop website, <http://www.hufiec-jaktorow.pl/rajd-ak/> (access: 07.03.2019).

33 *Rok Regionów*, Związek Harcerstwa Polskiego website, <http://rokregionow.zhp.pl/o-roku-regionow.html> (access: 07.03.2019).

34 *Polska myśląca*, Związek Harcerstwa Polskiego website, <http://polskamyslaca.zhp.pl/filmy.html> (access: 07.03.2019).

the one hand, this initiative gives young people the opportunity to become more familiar with the history and tradition of their homeland through preparations for the competition, on the other hand, it awakens national awareness and a sense of pride in being a Pole in the older generation.

Scouting organization also work with the school environment in shaping national identity and patriotic education

Their collaboration with a school can manifest itself in:

- taking charitable initiatives;
- the inclusion of parents in the activities of the scouts;
- organizing public, Church and school holidays celebration;
- events for the school and community;
- showing scouting methods of self-reliance and resourcefulness for young people;
- learning to take joint action and to bear responsibility for it;
- volunteering;
- cooperation with uniformed services;
- organization of summer and winter camps.<sup>35</sup>

Scouting organizations actively cooperate with schools in organizing various patriotic events such as patron day, national anniversaries or other important dates from the point of view of the history of Poland. In the Primary School in Międzybórz, scouts co-organized a Patriotic Scout Song festival in order to disseminate knowledge about the historic Polish music related to our country.

## Conclusions

The issues related to the shaping of national identity are current and important because of the need to constantly cultivate the memory of past generations and Polish history. Scouting organizations have actively contributed to the maintaining of Polish tradition, culture and customs. Through the activities of ZHP and other organizations, formation of national identity from generation to generation possible in smaller and larger scouting groups, and in cooperation with the school environment. ZHP operates a number of initiatives aimed at the comprehensive development of youth, with a particular stress on patriotism and national identity formation. This article presented the selected initiatives in the field of development of

---

<sup>35</sup> *Rola harcerstwa w współczesnej szkole*, Związek Harcerstwa Polskiego, <http://www.spg.olecko.edu.pl/files/harcerstwo.pdf> (access: 07.03.2019).

patriotism in scouting organizations. It seems advisable to conduct empirical research which will show how young scouts perceive their patriotism, which influences the formation of national identity in them.

## BIBLIOGRAPHY

- Banach M., *Wychowanie patriotyczne w harcerstwie*, in: R. Ceglarek, *Wartość patriotyzmu w edukacji szkolnej*, Scriptum, Kraków 2011, pp. 13, 23-24.
- Baran L., *Jaki duch w zdrowych ciałach. System aksjonormatywy członków związku strzeleckiego "Strzelec" Józefa Piłsudskiego*, "Rocznik Bezpieczeństwa Międzynarodowego," Vol. 12, 1, 2018, p. 186.
- Cieciera E., *Wpływ metody harcerskiej na funkcjonowanie społeczne dzieci niepełnosprawnych*, "Student Niepełnosprawny: szkice i rozprawy," 2017, 1, p. 248.
- Ciosek Z., *Odkrywanie tożsamości narodowej poprzez badanie dyskursu medialnego*, "Łódzkie Studia Teologiczne," 2014, Vol. 23, 1, p.11.
- Jan Paweł II, *Pamięć i tożsamość*, Wydawnictwo Znak, Kraków 2005, p. 66
- Kołodziej A., *Problematyka patriotyzmu w wychowaniu harcerskim w Związku Harcerstwa Rzeczypospolitej (ZHR)*, "Biuletyn Historii Wychowania," 2013, 30, pp. 136-137.
- Kornacka-Skwar E., *Tożsamość narodowa w świetle przemian kulturowych*, "Prace Naukowe AJD. Pedagogika," 2011, 20, p. 113.
- Kurzępa J., *Rola organizacji harcerskich w budowaniu społeczeństwa obywatelskiego*, "Rocznik Lubuski," Vol. XXIX., Zielona Góra 2003, p. 291.
- Łastaski K., *Historyczne i współczesne wartości polskiej tożsamości narodowej*, "Słupskie Studia Historyczne," 2007, 13, p. 281.
- Narvois O., *Tożsamość narodowa a cechy osobowości młodych Polaków mieszkających na Litwie*, "Studia z Psychologii w KUL," 2011, Vol. 17, eds. M. Czerepaniak-Walczak, J. Madalińska-Michalak, B. Śliwerski, p. 86.
- Nowak M., *Kryzys wartości czy kryzys człowieka w XXI wieku?*, in: *Ku życiu wartościowemu. Idee – koncepcje – praktyki*, Vol. 1, eds. M. Czerepaniak-Walczak, J. Madalińska-Michalak, B. Śliwerski, Impuls, Kraków 2018, p. 95.
- Pilarska A., *Wokół pojęcia poczucia tożsamości: przegląd problemów i propozycja konceptualizacji*, "Nauka," 2016, 2, pp. 126-127.
- Polish Bishops' Conference, *Chrześcijański kształt patriotyzmu*, TUM, Wrocław 2017.
- Rzeczkwaska E., *Tajne organizacje harcerskie w Polsce w latach 1944-1956*, "Pamięć i Sprawiedliwość", 1, 2011, p. 121.
- Siuda P., *Rola Internetu w budowaniu tożsamości narodowej*, in: *Rola informatyki w naukach ekonomicznych i społecznych*, ed. K. Grysa, Zeszyty Naukowe – Wyższa Szkoła Handlowa im. Bolesława Markowskiego w Kielcach, Kielce 2007, Iss. 4, p. 219.



Trojanowski P., *Czasopismo Znicz (Kraków, 1930-1939)*, “Annales Academiae Paedagogicae Cracoviensis,” Folia 47 Studia ad Bibliothecarum Scientiam Pertinentia V, 2007, p. 82.

Wagner B., *Strategia wychowawcza w PRL*, Wydawnictwo Neritom, Warszawa 2018.

## Netography

*Centralny Bank Pomysłów ZHP*, <http://cbp.zhp.pl/kierunki/radosny-patriotyzm/> (access: 07.03.2019).

Dębiński A., *Słowo Rektora Katolickiego Uniwersytetu Lubelskiego Jana Pawła II z okazji świąt Bożego Narodzenia*, Lublin, 2013, p. 2, [http://diecezja.kielce.pl/sites/default/files/list\\_rektora\\_kul\\_-\\_bn2013.pdf](http://diecezja.kielce.pl/sites/default/files/list_rektora_kul_-_bn2013.pdf) (access: 05.03.2019).

*Historia harcerstwa*, Związek Harcerstwa Polskiego website, <https://zhp.pl/ozhp/historia-harcerstwa> (access: 06.03.2019).

Ogrocka A., *Komentarze do Prawa i Przyrzeczenia Harcerskiego Oraz Kodeksu Wędrowniczego*, Materiał dla drużynowych, p. 4, [http://cieszyn.Zhp.pl/download/PiP\\_historia.doc](http://cieszyn.Zhp.pl/download/PiP_historia.doc) (access: 06.03.2019).

*Polską myśląc*, Związek Harcerstwa Polskiego website, <http://polskamyslaca.zhp.pl/filmy.html> (access: 07.03.2019).

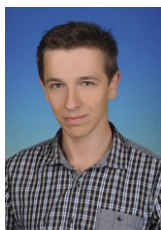
*Rok Regionów*, Związek Harcerstwa Polskiego website, <http://rokregionow.zhp.pl/o-roku-regionow.html> (access: 07.03.2019).

*Rola harcerstwa w współczesnej szkole*, Związek Harcerstwa Polskiego website, <http://www.spg.olecko.edu.pl/files/harcerstwo.pdf> (access: 07.03.2019)

The ZHP Jaktorów Troop website, <http://www.hufiec-jaktorow.pl/rajd-ak/> (access: 07.03.2019).

The ZHP Podlasie Troop in Siedlce website, <http://siedlce.zhp.pl/siedlecka-mapazycia> (access: 03.06.2019).

*ZHP Rówieśnik Niepodległej*, Chorągiew Kujawsko-Pomorska ZHP, [https://kujawskopomorskie.Pl/pliki/2018/wiadomosci/20180116\\_harcerstwo/Program-ZHP.Pdf](https://kujawskopomorskie.Pl/pliki/2018/wiadomosci/20180116_harcerstwo/Program-ZHP.Pdf) (access: 06.03.2019).



**Kamil Roman**—holds an MA in Management Studies from the Siedlce University of Natural Sciences and Humanities (2016). PhD student in Pedagogy at the Faculty of Social Sciences of the Catholic University of Lublin. His research interests focus on education management, quality of teaching in educational institutions, on top of the functioning of Catholic schools in the Polish educational system and patriotic education.



**Michał Szkoła**

<http://orcid.org/0000-0001-6221-6876>

Jesuit University Ignatianum in Krakow

[szkolamichal@interia.pl](mailto:szkolamichal@interia.pl)

DOI: 10.35765/pk.2019.2704.07

---

# Silesian Theological Seminary and Częstochowa Theological Seminary in Krakow— the Heritage of the Interwar Period. A Study of the History of Organization Management

---

## ABSTRACT

After Poland regained its independence in 1918, the Polish Roman Catholic Church needed to be reunited, so that thoroughly educated priests could be deployed to work in the newly established dioceses. The system of teaching had to be reorganized and this issue was finally regulated by the 1925 Concordat which guaranteed the possibility of creating a seminary in each diocese. A special situation took place in Krakow, where in the 1920s, in addition to the existing diocesan seminary, the Częstochowa Seminary and the Silesian Seminary were located. The article outlines the circumstances in which the seats of these institutions were established outside home dioceses and draws attention to the cultural context of the events of that time, whose material reflection remains as the two modernist buildings preserved in the center of Krakow.

**KEY WORDS:** Silesian Theological Seminary, Częstochowa Theological Seminary, Krakow modernism

## STRESZCZENIE

### *Śląskie Seminarium Duchowne i Częstochowskie Seminarium Duchowne w Krakowie – dziedzictwo dwudziestolecia międzywojennego. Studium z dziejów zarządzania organizacją*

Po odzyskaniu przez Polskę niepodległości w 1918 r. Kościół katolicki wymagał zespolenia, a w nowo powołanych diecezjach mieli pracować gruntownie wykształceni duchowni. Reorganizacji wymagał system nauczania, kwestia ta została ostatecznie uregulowana przez konkordat z 1925 r. gwarantujący możliwość utworzenia seminarium duchownego w każdej diecezji. Kraków znajdował się w szczególnej sytuacji, ponieważ w latach 20. XX w. obok istniejącego seminarium diecezjalnego założono tu dodatkowo Częstochowskie Seminarium Duchowne oraz Seminarium Śląskie. Artykuł nakreśla okoliczności powstania siedzib tych instytucji poza macierzystymi diecezjami oraz zwraca uwagę na kulturowy kontekst ówczesnych wydarzeń, których materialnym odbiciem są dziś dwa modernistyczne gmachy zachowane w centrum Krakowa.

**SŁOWA KLUCZE:** Śląskie Seminarium Duchowne, Częstochowskie Seminarium Duchowne, modernizm krakowski

One of the foundations of local and national identity is cultural heritage, which is a special formula used for describing the past. In the light of social studies published in 2017, 90% of Poles recognize heritage as an important source of knowledge,<sup>1</sup> and for almost 92% of us it has value as a testimony to our history, which we should pass on to future generations.<sup>2</sup> An important element of the material heritage resources are works of architecture and urban planning, in which political, social and cultural changes are reflected. By discovering architectural monuments we discover the identity of the place, which is influenced by the past. However, it is worth noting that this identity will remain under the influence of the past as long as we make a choice in favor of memory and not oblivion.<sup>3</sup> According to

---

1 *Dziedzictwo kulturowe w badaniach. Vol. 1: Polacy wobec dziedzictwa. Raport z badań społecznych*, eds. A. Chabiera, A. Dąbrowski, A. Fortuna-Marek, A. Kozioł, M. Lubaś, P. Nowak, B. Skaldawski, K. Stępnik, Warszawa–Kraków 2017, p. 30.

2 *Ibidem*, p. 32.

3 J. Królikowski, *Genius Loci jako źródło tożsamości miasta*, "Zeszyty Naukowe Politechniki Poznańskiej. Architektura i Urbanistyka," Vol. 24 (2011), p. 6.

the definition of Ewa Glińska, the city's identity is "a set of historically conditioned characteristics of the city that distinguish it from others and expressed by all actions that are taken in the city to create its specific personality and character."<sup>4</sup> However, as Jeremi T. Królikowski notes, "the awareness of the uniqueness of a place is deepened by learning about its tradition, through memory, and contains the visions of the future discovery of its potential."<sup>5</sup>

Only distinctive places and objects, as well as the related history, usually remain in the collective memory. In the case of Krakow, one of the most symbolic cities in Poland, the landmarks are mainly Wawel, the Cloth Hall, the Main Market Square and St. Mary's Church.<sup>6</sup> Other monuments of the city remain in their shadow, especially those created only during the previous century. In this context, it is worth recalling the genesis of the construction in Krakow in the 1920s, of the buildings of the Częstochowa Theological Seminary at 3 Bernardyńska street and the Silesian Seminary at al. A. Mickiewicza 3, which, under canon law, should be conducted within individual dioceses. Although today the buildings no longer house the original diocesan institutions, while retaining their historical name, they remain a proof of cultural and religious rank, and above all they testify to the complex situation of the Polish state and the Church after regaining independence in 1918.

Although Kraków has lost its political significance over the centuries, the city located near Wawel was referred to as the spiritual capital of Poles during the partitions. During the period of national captivity, the city full of symbols and memorabilia was an important center of patriotic and independence thought. In addition, in the era of Galician autonomy, relatively favorable conditions appeared for cultivating language, tradition and faith. Józef Ignacy Kraszewski, after visiting Wawel in 1871, wrote in "Tygodnik Polityczny, Naukowy, Literacki i Artystyczny" that "Krakow has not changed its old face, a reliquary on the breasts of Poland."<sup>7</sup> Whereas in 1889 Stefan Żeromski mentioned in *Dzienniki*:

I began to roam around the city, to feel this Polish atmosphere, from stones, from houses, from towers blowing with antiquity and for an hour

---

4 E. Glińska, *Socjologiczna i marketingowa koncepcja tożsamości miasta*, in: *Obywatelstwo i tożsamość w społeczeństwach zróżnicowanych kulturowo i na pograniczach*, Vol. 1, Białystok 2006, p. 34.

5 J. Królikowski, *Genius Loci*, op. cit., p. 6.

6 J. Kwolek, R. Szmytkie, *Symbole dużych miast w opinii studentów*, in: *Percepcja współczesnej przestrzeni miejskiej*, ed. M. Madurowicz, Warszawa 2007, p. 250.

7 "Tygodnik Polityczny, Naukowy, Literacki i Artystyczny," 1871, Iss. 14.

I rejected all other thoughts, except the pleasures of breathing this city of the spirit, this “center of Polishness.”<sup>8</sup>

The city was also associated with Christian culture, and because of the number of churches and monasteries and the presence of church colleges, it was called *Altera Roma*. Religious life at the turn of the 19th and 20th centuries was influenced by diocesan clergy formed at the Theological Seminary and the Faculty of Theology of the Jagiellonian University.<sup>9</sup> Owing to the efforts of bishop Adam Stefan Sapieha, who had ruled the diocese since March 1912 and showed great concern for the proper formation of the diocesan clergy under his responsibility, Krakow was strengthening its position as a scientific and didactic center for theological studies.

All this meant that at that time Poles from other partitions, pilgriming to the former capital in search of sources of Polishness, willingly maintained contacts with the city. Some of the Silesians living in the spirit of Polishness were also visiting Krakow, though not without difficulties. They were attracted to the city by the religious and patriotic symbolism of the Pauline monastery on Skalka,<sup>10</sup> Wawel, the Kościuszkó and Wanda Mound, the Cloth Hall and museums. The connection with Krakow so established in the second half of the 19th century served to strengthen the religious, cultural and nationality, and at the same time contributed to the deepening of the relationship between patriotic feelings and Catholicism.<sup>11</sup> A new card in these relations was opened when independence was regained.

After 123 years of captivity, the institutional Church, as well as the government spheres, noticed the need to join the areas previously belonging to various partitions. It was necessary to reorganize the Church administration and adapt the diocese’s boundaries to national borders, and to revive religious life owing to clerics educated in theological studies.

---

8 S. Żeromski, *Dzienniki*, Vol. 6, Warszawa 1966, p. 188.

9 From 1 September 1895, at the initiative of Bishop Jan Puzyna, so-called Small Seminary of the Diocese of Krakow, founded on the model functioning in Lviv since 1840. About 30 boys from poor families were admitted to the convent, who attended St. Anne Junior High School (named after Nowodworski). According to the assumption, some young people continued their education at the Major Seminary at 8 Podzamcze str., with its neo-Gothic brick building erected in 1899-1902 according to the design of Gabriel Niewiadomski, and then expanded until 1927, see: J. Urban, *Diecezja krakowska w XIX wieku*, in: *Kościół krakowski w tysiącleciu*, Kraków 2000, p. 383.

10 J. Wycisło, *Motywacje narodowych pielgrzymek Górnoślążaków do Krakowa na przełomie XIX/XX wieku. Przeciwdziałania pruskiej policji*, in: *Kościół krakowski w życiu państwa i narodu polskiego*, ed. A. Pankowicz, Kraków 2002, pp. 155-173.

11 *Ibidem*.

Pursuant to the constitution of 17 March 1921, “the Roman Catholic Church has its own laws,” and detailed regulations were to be set out in the concordat.<sup>12</sup> The agreement between the Holy See and the Republic of Poland was concluded on 10 February 1925,<sup>13</sup> ordering e.g. the formation of priests in dioceses. Article IX of the concordat stated that the hierarchy in the Latin rite would be organized within five Church provinces—Gniezno and Poznań, Warsaw, Vilnius, Lviv and Krakow.<sup>14</sup> Whereas Article XIII item 2 guaranteed that “in all dioceses the Catholic Church would have a seminary, according to canon law, which it would direct and appoint teachers ...” The Holy See was obliged to establish and demarcate Church provinces and dioceses within three months of the entry into force of the concordat. Accordingly, on 28 October 1925, Pope Pius IX issued the bull *Vixdum Poloniae unitas*, which was based on the project of reorganizing the Church presented by bishops Henryk Przeździecki and Romuald Jałbrzykowski, approved by the Polish Episcopal conference in July 1924 in Częstochowa.<sup>15</sup> The papal document raised the diocese of Krakow to the rank of a metropolis, headed by prince Adam Stefan Sapieha, Metropolitan Archbishop of Krakow, while the archbishopric included the dioceses of Tarnów and Kielce as well as the newly created dioceses of Częstochowa and Silesia (Katowice).<sup>16</sup>

However, before the expansion of the diocesan education system could be discussed, the struggle for Upper Silesia to belong to Poland and parallel efforts to establish the Silesian diocese, independent of the jurisdiction of the diocese of Wrocław, had to be ended in 1919-1921. The symbolic connection of the Silesian land with the Republic of Poland took place on 16 July 1922 during a ceremony in the Kościuszkowski Park in Katowice<sup>17</sup>

12 Constitution of the Republic of Poland—Act of 17 March 1921 (Journal of Laws of 1921 No. 44 item 267).

13 The document was signed on behalf of the President of the Republic of Poland by Władysław Skrzyński—Polish ambassador to the Holy See and Stanisław Grabski—MP and former Minister of Religious Denominations and Public Enlightenment and by the plenipotentiary of the Pope, Cardinal Pietro Gasparri—Secretary of State. The treaty, then ratified by the Sejm, entered into force on 2 August 1925.

14 Concordat between the Holy See and the Republic of Poland, signed in Rome on 10 February 1925 (Journal of Laws of 1925 No. 72, item 501)

15 J. Związek, *Z dziejów Częstochowskiego Seminarium Duchownego w Krakowie (1926-1991)*, “Veritati et Caritati,” No. 6 (2016), p. 351.

16 S. Piech, *Odnowiona diecezja krakowska w obliczu „znaków czasu” 1879-1978*, in: *Kościół krakowski w życiu państwa i narodu polskiego*, ed. A. Pankowicz, Kraków 2002, pp. 138-139; S. Piech, *W cieniu kościołów i synagog. Życie religijne międzywojennego Krakowa 1918-1939*, Kraków 1999, p. 31.

17 The union with Poland was commemorated by the Act of Acquisition of Upper Silesia signed by representatives of the Government and the Sejm, the Ministry of Military Affairs, members

and was preceded by the conclusion of the *German-Polish Convention on Upper Silesia, signed in Geneva on 15 May 1922*,<sup>18</sup> regulating the rights of the Polish and German population in the disputed area. Section III of the act contains regulations on religious matters, and the date of 1 July 1923 was indicated as the deadline for adapting the organizational structures of individual denominations to the newly set state borders.<sup>19</sup> In fact, the Wrocław bishop Adolf Bertram already in 1919 was afraid of the necessity of excluding part of Upper Silesia from his power.<sup>20</sup> A sign of changes was the appointment of Fr. Jan Kapica on 21 October 1921, the day after the decision of the Council of Ambassadors on the division of the plebiscite area, as the Prince-Bishopal Delegate with the rights of vicar general, whose task was to supervise the Polish part of the diocese.<sup>21</sup> This fact inspired Polish activists to work hard for the creation of a separate diocese and a seminary independent of the bishop of Wrocław. Polish aspirations in this area were met with the bishop's reserve, and the thesis of Fr. Michał Lewek, head of the Department of Religious Denominations and the resolutions of the Supreme People's Council adopted as a temporary body of authority received a lot of attention in February and March 1922. At that time, the Delegate was called to support efforts to create a separate diocese and to deploy Polish clerics from Wrocław in the Krakow seminary, as well as in Poznań and Lviv.<sup>22</sup> It was also postulated to build a seminary for 80 clerics, professors, rector, priest and prefect.<sup>23</sup> This speech was met with the disapproval of bishop Bertram, who decided that clerics should remain in Wrocław, and admitted studies in Krakow or Poznan in exceptional cases.<sup>24</sup> The situation was complicated by the fact that several clerics who had previously studied theology in Wrocław already in autumn 1921 started the studies at the Faculty of Theology of the Jagiellonian University, where they had the status of students. At that time, the Alumni occupied an apartment rented from the Carmelite fathers in a tenement house at

---

of the Provisional Provincial Council in Silesia and official delegates from Poland and Silesia, see: J.J. Ludyga-Laskowski, *Wyzwolenie Śląska – i Górny Śląsk*, in: *Dziesięciolecie Polskiej Odrodzonej. Księga pamiątkowa 1918-1928*, Kraków-Warszawa 1928, pp. 137-138.

18 *German-Polish Convention concerning Upper Silesia, signed in Geneva on 15 May 1922* (Journal of Laws of 1922, No. 44, item 371).

19 Ibidem.

20 F. Maroń, *Historia Diecezji Katowickiej. Sytuacja Górnego Śląska po pierwszej wojnie światowej*, "Nasza Przeszłość," Vol. 44 (1975), p. 11.

21 J. Myszor, *Historia Diecezji Katowickiej*, Katowice 1999, pp. 16-17.

22 F. Maroń, *Historia Diecezji Katowickiej. Sytuacja Górnego Śląska*, op. cit., p. 391.

23 Ibidem, p. 21.

24 Ibidem, p. 25.



13 Garbarska street and on this door the chalk inscription “Silesian Theological Seminary” appeared for the first time.<sup>25</sup>

The regulation of the issue of teaching the future clergy was prioritized by Fr. August Hlond, later bishop ordinary of the Katowice diocese. On 7 November 1922, he was appointed the Apostolic Administrator of Polish Silesia by the Holy Father,<sup>26</sup> which was a temporary form before the creation of the new diocese. After the ingress, Fr. Hlond gave an interview to the *Oberschlesische Grenzzeitung*, in which he openly announced the independence of the seminary from Wrocław.<sup>27</sup> A year later, 33 theologians studied in Krakow,<sup>28</sup> and the first Fr. who graduated here during the Administration was Józef Brzenska, who was ordained a priest on 14 September 1924 by the bishop-suffragan Anatol Nowak.<sup>29</sup> Owing to the efforts of Fr. Hlond and Fr. Wawrzyniec Pucher the favor of the father of general Włodzimierz Ledóchowski SJ, clerics began the academic year 1923/24 at ul. Kopernika, in the premises shared for the needs of the Silesian Seminary by the Jesuit College.<sup>30</sup> Initially, the alumni of the emerging seminary were taken care by Fr. Pucher, while the first rector was Fr. Władysław Lohn SJ. According to Fr. Stanisław Kosiński,

this makeshift seminary lasting several years educated a number of prominent priests who did not bring shame or disappointment to their ordinary and diocese, because they really graduated as valuable priests.<sup>31</sup>

Their moral, intellectual and national attitude was shaped thanks to the proximity of the Jesuits, an excellent group of University professors, but also, as Fr. Hlond reminded, owing to the possibility of education “in the

---

25 F. Żebrok, *Dzieje Śląskiego Seminarium Duchownego*, “Nasza Przeszłość,” 44 (1975), p. 90; M. Kłakus, *Geneza i rozwój Śląskiego Seminarium Duchownego w Krakowie*, in: *Wyższe Śląskie Seminarium Duchowne 1924-2004*, ed. J. Kupny, Katowice 2004, pp. 16-18; J. Kiedos, H. Olszar, *Losy Gmachu Wyższego Śląskiego Seminarium Duchownego w Katowicach*, “Śląskie Studia Historyczno-Teologiczne,” XV (1982), p. 57.

26 S. Kosiński, *August Hlond na Śląsku: W 60. rocznicę erygowania diecezji katowickiej*, “Śląskie Studia Historyczno-Teologiczne,” 18 (1985), pp. 7-25; S. Książek, *Granice o podział diecezji wrocławskiej na komisariaty i dekanaty w latach 1914-1945*, “Prawo Kanoniczne: kwartalnik prawnohistoryczny,” 19 (1976), No. 3-4, pp. 128-129.

27 F. Maroń, *Historia Diecezji Katowickiej. Sytuacja Górnego Śląska*, op. cit., p. 29.

28 Ibidem, p. 33; Michał Kłakus gives the number of 26 alumni, see: M. Kłakus, *Geneza i rozwój Śląskiego Seminarium Duchownego w Krakowie*, op. cit., p. 22.

29 F. Maroń, *Historia Diecezji Katowickiej. Sytuacja Górnego Śląska*, op. cit., p. 35.

30 S. Kosiński, *August Hlond na Śląsku*, op. cit., p. 13; M. Kłakus, *Geneza i rozwój Śląskiego Seminarium Duchownego w Krakowie*, op. cit., p. 21.

31 S. Kosiński, *August Hlond*, op. cit., p. 14.

heart of Poland.”<sup>32</sup> It is worth noting that the choice of Krakow for the place of theological studies was caused by the complicated situation of the Catholic Church in the Upper Silesia directed by German bishops of Wrocław and what is also important it aimed at polonizing priests working in the future Katowice diocese.

At that time, the location of the Silesian Theological Seminary was still not a foregone conclusion. Admittedly, since July 1924 talks have been held with the Krakow authorities regarding the acquisition of land for investment, however already in December the prefect of the Congregation of Seminaries and Universities, Cardinal Gaetan Bisleti, recommended the construction of a seminary in Katowice or the placement of students at the Catholic University of Lublin.<sup>33</sup> Initially, Fr. Hlond intended to carry out this order, but ultimately, among others due to the appropriate academic facilities, the option of building a seminary in Krakow was chosen. A plot at al. A. Mickiewicza 3 was acquired from the City Council and the agreement finalized in February 1927 assumed a long-term lease of land, which the diocesan authorities bought in 1933 for 260 000 zlotys.<sup>34</sup> The location should be considered prestigious, because the green boulevard formed at that time—Aleje Trzech Wieszców, was to focus the metropolitan functions of the city.<sup>35</sup> Construction began on 1 September, while on 28 November, Metropolitan Fr. Sapieha blessed the cornerstone. It is worth noting that the ceremony was attended by, among others, bishop Teodor Kubina, head of the newly created diocese of Częstochowa since 1926, who initially assumed that seminarians of the diocese of Częstochowa could also be able to live in the building, which, however, it did not occur due to differences in the preparation of clerics for pastoral work in both dioceses with different dioceses traditions.<sup>36</sup>

During the construction of the seminary, the Curia of Katowice was represented by the building architect Franciszek Rozkoszny, while the author of the project was the renowned Krakow architect Zygmunt Gawlik in cooperation with Franciszek Mączyński, with whom he also worked on the construction of the cathedral in Katowice. Their design combines diverse inspirations in a manner characteristic of the Krakow architectural environment at the time, becoming a valuable example of

---

32 Ibidem.

33 J. Myszor, *Historia Diecezji Katowickiej*, op. cit., p. 119.

34 F. Żebrok, *Dzieje Śląskiego Seminarium Duchownego*, op. cit., p. 95.

35 B. Zbroja, *Monumentalne i eleganckie – Aleje Trzech Wieszców*, in: *Modernizmy. Architektura nowoczesności w II Rzeczypospolitej*. Vol. 1. *Kraków i województwo krakowskie*, ed. A. Szczerski, Kraków 2013, pp. 119-163.

36 J. Związek, *Z dziejów Częstochowskiego Seminarium Duchownego*, op. cit., p. 359.

the creative search of the so-called “Krakow school.”<sup>37</sup> The monumental, three-wing, symmetrical building covered with a flat roof had a typical expression of modernism, with classicist-like elements. References to tradition are the frieze and prominent eaves, as well as window frames and the prominent, semi-circular closed portal. The latter was decorated with floral ornament, and above it there was a bas-relief with the image of St. Hyacinth, patron of the Silesian diocese. Attention is drawn to the lateral, higher wings crowned with carvings of four evangelists designed by the outstanding sculptor Xawery Dunikowski. The modern building had functional interiors. A chapel was placed in the north wing on the 4th floor, and a refectory on the ground floor (Photo 1).

Regardless of the finishing works in progress, in October 1927 the new headquarters of the seminary was ready for the alumni who after four years left the difficult housing conditions at the Jesuit Fathers.<sup>38</sup> The building was consecrated on 28 November 1929 in the presence of Archbishop Sapieha, Bishop of Katowice Arkadiusz Lisiecki, Bishop Teodor Kubina, Bishop Stanisław Rospond and representatives of the city and university authorities.<sup>39</sup> The total cost of building the seminar amounted to nearly 1,637,000 zlotys and was financed by a loan granted by the Silesian Szym, gifts, subsidies and generosity of the inhabitants of Upper Silesia.<sup>40</sup>

The building has retained its original form until today, although in 1937 the expansion of the east wing was considered. The structure of the building was preserved without major changes also during the World War II. Admittedly, the occupation authorities requisitioned the seminary for the needs of the Main Directorate of the German Police, and a cinema room was arranged in the chapel and Dunikowski’s sculptures on the facade were bricked up, but no further extension was not carried out. The building was seriously damaged by fire on 19 January 1945, as a result of arson, which forced the renovation after WWII.

The conditions for establishing the seminary of the diocese of Częstochowa were definitely less complex, although the process of establishing the facility was not obstacle-free. Due to the role of Jasna Góra in the religious life of Poles, after regaining independence, the need to create a new diocese was indisputable. The Bishop of Włocławek, Stanisław

---

37 M. Wiśniewski, *Architektura użyteczności publicznej*, op. cit., pp. 31-32. According to the architectural project preserved in The National Archives in Krakow, Department V – Cartographic materials and technical documentation, architects introduced changes in the initial design, see: ANK ABM, B310, al. Mickiewicza 3/Humberta 4/6.

38 Ibidem, pp. 146-150.

39 M. Kłakus, *Geneza i rozwój Śląskiego Seminarium Duchownego w Krakowie*, op. cit., pp. 33.

40 A Palion, *Seminarium to też budynek*, op. cit., pp. 142-143.

Zdzitowiecki, to whose diocese Częstochowa belonged, already in November 1918 established a General Vicariate and a local officiality.<sup>41</sup> When the diocese of Częstochowa was established in 1925, the above-mentioned Fr. Kubina, a national activist well known in Upper Silesia, became its bishop. In the first pastoral letter, the bishop among the most urgent tasks pointed out the need to increase the number of clerics, while appealing to the young men to consider priesthood and theological studies at the University of Krakow.<sup>42</sup> The bishop's words were justified by the fact that the diocese was created from the peripheral areas of the Kielce and Włocławek dioceses, covering 174 parishes and about 877,000 faithful of diverse social and cultural character.<sup>43</sup> The parishes covered vast areas and an excessive population, and 15 of them numbered over 10,000 of the faithful.<sup>44</sup> Unfortunately, the extension of pastoral activity was impossible due to the lack of a sufficient number of priests.<sup>45</sup> The situation was to change owing to the clergy educated at the diocesan seminary, and not as previously educated as part of the *seminarium domstesticum* unrelated to the theological faculty. The integration of the Częstochowa region required the introduction of a uniform type of religiosity by priests cooperating in a common spirituality, so the need to create their own unit was very urgent for the diocese.

Bishop Kubina, who was thoroughly educated, was convinced that the diocesan seminary was not able to lead the future Fr. to the heights of knowledge that the Faculty of Theology of the Jagiellonian University opens to the students.<sup>46</sup> Therefore, he was supporting the establishment of a new facility in Krakow. He justified his position by the lack of a proper premises in Częstochowa, as well as difficulties in providing adequate teaching facilities. The possible necessity of involving the diocesan clergy in conducting the seminary would mean an additional limitation of pastoral ministry. Finally, despite the serious doubts of the Diocesan Consultors, having the favor of the Metropolitan and university authorities, the bishop on 1 October 1926 erected the Częstochowa Theological Seminary in Krakow.<sup>47</sup> He supported his position by saying that Krakow with

---

41 J. Związek, *Integracyjna rola Kościoła katolickiego na Ziemi Częstochowskiej*, in: *Błogosławione choć trudne czasy*, ed. J. Kowalski, Częstochowa 2000, p. 53.

42 T. Kubina, *W podniosłych chwilach i doniosłych sprawach*, Vol. 1, Częstochowa 1931, p. 6.

43 W. Właźlak, *Rozwój sieci parafialnej i dekanalnej w diecezji częstochowskiej na przestrzeni jej historii*, in: *Siedemdziesięcioletnie Kościoła częstochowskiego*, ed. J. Kowalski, Częstochowa 2000, p. 161.

44 Ibidem.

45 Ibidem, p. 168.

46 T. Kubina, *W podniosłych chwilach*, op. cit., p. 170.

47 J. Kowalski, *Charakterystyczne rysy Częstochowskiego Wyższego Seminarium Duchownego*, in: *Błogosławione choć trudne czasy*, op. cit., p. 216.

the royal castle and churches, graves of kings, saints and great Poles is a special place for Catholic and national culture.<sup>48</sup> It is worth mentioning that Fr. Kubina, previously as the Consultant of the Administration of Upper Silesia, was also in favor of placing the seminary in Krakow.

The foundations of the new institution were created by the rector, appointed by the bishop, Fr. Karol Makowski. In the first period, he supervised both the recruitment and education of clerics, and established contacts with the University as well as city authorities and clergy.<sup>49</sup> On 2 October 1926, 26 clerics began their studies at the university, initially finding hospitality in the modest conditions of the Bernardine Fathers' monastery.<sup>50</sup> As in the initial period of the Silesian Seminary, the issue of housing needs remained the basic problem of the new institution.

The development of the seminar was conditioned by the construction of its own facility, which in turn required social contributions and high donations. Considering the economic crisis at the end of the 1920s, the impoverished society of the diocese was unable to bear the cost of the project itself. In this situation, Bishop Kubina received invaluable help in 1926 during his stay at the International Eucharistic Congress in Chicago, when, while visiting Polish parishes, he managed to gather nearly USD 20,000.<sup>51</sup> This was a very significant financial support, which allowed to gather building materials and, above all, to buy for 50,000 zlotys on 14 January 1928 at Bernardyńska street, directly at the foot of the Wawel Hill.<sup>52</sup> Considering the fact that the cost of the construction and equipping the building was to amount to over 1 million zlotys, the implementation of the investment would not have been possible without further support for the Polish diaspora, collections among the faithful and the sacrifice of the clergy themselves in the diocese, as well as loan.<sup>53</sup>

The construction of the building began on 8 May 1928,<sup>54</sup> and the rector was assisted at that time by Fr. Zygmunt Sędzimir, delegated for economic matters directly by the bishop.<sup>55</sup> The edifice of Częstochowa Seminary was also built according to a design by Zygmunt Gawlik and

---

48 Ibidem.

49 Ibidem, p. 217.

50 J. Związek, *Z dziejów Częstochowskiego Seminarium Duchownego w Krakowie*, op. cit., p. 359.

51 J. Kowalski, *Charakterystyczne rysy Częstochowskiego Wyższego Seminarium Duchownego*, op. cit., p. 217.

52 Ibidem.

53 Ibidem.

54 J. Kowalski, *Dzieje Częstochowskiego Seminarium Duchownego w Krakowie*, op. cit., p. 159.

55 Ibidem, p. 217. Architectural project is preserved in The National Archives in Krakow, Department V – Cartographic materials and technical documentation, see: ANK ABM, f31, ul. Bernardyńska 3.

Franciszek Mączyński, and approved directly by Bishop Kubina and Fr. Makowski, which is confirmed with their signatures on the project. Also, in this case, the team designed a high-class modernist building in the spirit of the “Krakow school.” The symmetrical façade, closed on the sides with avant-corps, are characterized by simplifications typical of the Krakow architectural environment, and the attention is drawn to the Neo-Roman portal with reduced decoration, corresponding to the plastically developed plinth. An important element of the project are sculptural compositions of considerable size with the word on the axis of the building and above the avant-corps.<sup>56</sup> They refer to the symbolism of evangelists and show the temptation of a cleric by the devil, as well as Christ blessing Poland symbolized by a woman. The whole, designed with great sensitivity, gives the impression of coherence and monumentalism, and the building fits well with the immediate surroundings of Wawel and the Baroque church and monastery of Bernardine Fathers ((Photo 2).

Despite temporary difficulties caused by financial and executive issues, including bad soil conditions within the former branch of the Vistula river, the most important construction works were completed in 1929. Finishing works were carried out over the next year. Finally, on 6 October 1930, the first mass was celebrated in the chapel, including with the participation of Bishop Kubina and the Metropolitan of Krakow, who consecrated the building.<sup>57</sup>

The seminary remained in the building until the beginning of September 1939. At that time, the building was seized by the occupation authorities, and the seminary had to change its headquarters several times until the end of the war. After the liberation of Krakow in January 1945, the fire destroyed the chapel, which did not prevent the Soviet army from organizing a hospital in the building. It was not until 14 April 1946 that the clerics returned to Bernardyńska street and the rector could take the trouble of renovation.

The establishment of the Silesian Theological Seminary and the Częstochowa Theological Seminary in Krakow was possible owing to the favor of the University authorities and full support of Archbishop Sapieha, who played a central role in the development of provisions enabling the functioning of these entities near Wawel.<sup>58</sup> The merger of the diocese of Krakow with students of the dioceses of Częstochowa and Silesia in the

---

56 M. Wiśniewski, *Architektura użyteczności publicznej*, op. cit., p. 34.

57 J. Związek, *Z dziejów Częstochowskiego Seminarium Duchownego w Krakowie*, op. cit., pp. 365-366.

58 W.M. Bartel, *Naukowy mecenat Adama Stefana Sapiehy*, in: *Księga Sapieżyńska*, ed. J. Wolny, Kraków 1982, p. 223.

intention of the Ordinary was to strengthen the center of theological studies in Krakow so that it would become the strongest in Poland. As expected, the creation of new seminaries meant a sharp increase in the number of students. While in the partition period the number of students of theology amounted from 40 to 100 people, in the academic year 1925/26 there were already 163, while in the years 1926-1939 the number fluctuated between 288 and 391 people.<sup>59</sup> As a result, as Fr. Stanisław Piech mentioned, from the end of the 19th century until World War II the Faculty of Theology was experiencing a renaissance, which can be compared to the golden period of the university in the fifteenth century, there was a breakthrough in the interwar period, and at the foot of Wawel we are dealing with the largest group of Catholic seminary students in Poland.<sup>60</sup>

Nowadays, the buildings still have didactic functions, although they are no longer the seats of seminaries. Students of the Silesian Seminary are educated in Katowice from the academic year 1980/1981, and the building has since served the needs of the Jagiellonian University. Whereas, the Częstochowa Seminary was not moved from Krakow until 1991, after the construction of a new building in Częstochowa. The building at Bernardyńska street was the seat of the Major Seminary of the Diocese of Sosnowiec until 2013, and presently it is used by the Pontifical University of John Paul II in Krakow. Over the years, well-preserved buildings have acquired the status of a monument, permanently inscribing in the architectural landscape of Krakow, as valuable examples of Krakow's interwar modernism. The article is intended to remind only the circumstances of the creation of these special facilities on the city map and does not discuss the rich history of diocesan institutions. Nevertheless, this outline should lead us to remember that the facades of old seminaries not only present special architectural values, but also testify to the cultural role of Krakow and the complex history of the Second Republic of Poland.

---

59 Ibidem, p. 224. According to the data published by Fr. Stanisław Piech, the Faculty of Theology had as many as 397 students in 1933/34. Cf. S. Piech, *Odnowiona diecezja krakowska*, op. cit., p. 139.

60 S. Piech, *W cieniu kościołów i synagog*, op. cit., p. 61.



**Photo 1.** Silesian Theological Seminary in Krakow, A. Mickiewicza 3, 1929, NAC 3/1/0/15/693

(Source: <https://www.szukajwarchiwach.gov.pl/jednostka/-/jednostka/5907782>)



**Photo 2.** The Theological Seminary of the Diocese of Częstochowa at Bernardyńska 3, 1930, NAC 3/1/0/15/696

(Source: <https://www.szukajwarchiwach.gov.pl/jednostka/-/jednostka/5977322>)



BIBLIOGRAPHY

- Bartel W.M., *Naukowy mecenat Adama Stefana Sapiehy*, in: *Księga Sapieżyńska*, ed. J. Wolny, Kraków 1982, p. 223.
- Concordat between the Holy See and the Republic of Poland, signed in Rome on 10 February 1925 (Journal of Laws of 1925, No. 72, item 501).
- Constitution of the Republic of Poland—Act of 17 March 1921 (Journal of Laws of 1921 No. 44, item 267).
- Dziedzictwo kulturowe w badaniach. Vol. 1: Polacy wobec dziedzictwa. Raport z badań społecznych*, eds. A. Chabiera, A. Dąbrowski, A. Fortuna-Marek, A. Koziół, M. Lubaś, P. Nowak, B. Skaldawski, K. Stępnik, Warszawa–Kraków 2017, p. 30.
- German-Polish Convention concerning Upper Silesia, signed in Geneva on 15 May 1922* (Journal of Laws of 1922, No. 44, item 371).
- Glińska E., *Socjologiczna i marketingowa koncepcja tożsamości miasta*, in: *Obywatelstwo i tożsamość w społeczeństwach zróżnicowanych kulturowo i na pograniczach*, Vol. 1, Białystok 2006, p. 34.
- Kiedos J., Olszar H., *Losy Gmachu Wyższego Śląskiego Seminarium Duchownego w Katowicach*, “Śląskie Studia Historyczno-Teologiczne,” XV (1982), p. 57.
- Kłakus M., *Geneza i rozwój Śląskiego Seminarium Duchownego w Krakowie*, in: *Wyższe Śląskie Seminarium Duchowne 1924–2004*, ed. J. Kupny, Katowice 2004, pp. 16–18.
- Kosiński S., *August Hlond na Śląsku: W 60. rocznicę erygowania diecezji katowickiej*, “Śląskie Studia Historyczno-Teologiczne,” 18 (1985), pp. 7–25.
- Królikowski J., *Genius Loci jako źródło tożsamości miasta*, “Zeszyty Naukowe Politechniki Poznańskiej. Architektura i Urbanistyka,” Vol. 24 (2011), p. 6.
- Książek S., *Granice o podział diecezji wrocławskiej na komisariaty i dekanaty w latach 1914–1945*, “Prawo Kanoniczne: kwartalnik prawnohistoryczny,” 19 (1976), No. 3–4, pp. 128–129.
- Kowalski J., *Charakterystyczne rysy Częstochowskiego Wyższego Seminarium Duchownego*, in: *Błogosławione choć trudne czasy*, ed. J. Kowalski, Częstochowa 2000, p. 216.
- Kwolek J., Szmytkie R., *Symbole dużych miast w opinii studentów*, in: *Percepcja współczesnej przestrzeni miejskiej*, ed. M. Madurowicz, Warszawa 2007, p. 250.
- Kubina T., *W podniosłych chwilach i doniosłych sprawach*, Vol. 1, Częstochowa 1931, p. 6.
- Ludyga-Laskowski J.J., *Wyzwolenie Śląska – i Górny Śląsk*, in: *Dziesięciolecie Polski Odrodzonej. Księga pamiątkowa 1918–1928*, Kraków–Warszawa 1928, pp. 137–138.
- Maroń F., *Historia Diecezji Katowickiej. Sytuacja Górnego Śląska po pierwszej wojnie światowej*, “Nasza Przeszłość,” Vol. 44 (1975), p. 11.

- Myszor J., *Historia Diecezji Katowickiej*, Katowice 1999.
- Palion A., *Seminarium to też budynek*, in: *Wyższe Śląskie Seminarium Duchowne 1924-2004*, ed. J. Kupny, Katowice 2004, p. 140.
- Piech S., *Odnowiona diecezja krakowska w obliczu „znaków czasu” 1879-1978*, in: *Kościół krakowski w życiu państwa i narodu polskiego*, ed. A. Pankowicz, Kraków 2002, pp. 138-139.
- Piech S., *W cieniu kościołów i synagog. Życie religijne międzywojennego Krakowa 1918-1939*, Kraków 1999.
- “Tygodnik Polityczny, Naukowy, Literacki i Artystyczny,” 1871, Iss. 14.
- Urban J., *Diecezja krakowska w XIX wieku*, in: *Kościół krakowski w tysiącleciu*, Kraków 2000, p. 383.
- Wiśniewski M., *Architektura użyteczności publicznej*, in: *Modernizmy. Architektura nowoczesności w II Rzeczypospolitej*. Vol. 1. *Kraków i województwo krakowskie*, ed. A. Szczerski, Kraków 2013, pp. 31-32.
- Właźlak W., *Rozwój sieci parafialnej i dekanalnej w diecezji częstochowskiej na przestrzeni jej historii*, in: *Siedemdziesięciopięćciolecie Kościoła częstochowskiego*, ed. J. Kowalski, Częstochowa 2000, p. 161.
- Wycisło J., *Motywacje narodowych pielgrzymek Górnoślązaków do Krakowa na przełomie XIX/XX wieku. Przeciwdziałania pruskiej policji*, in: *Kościół krakowski w życiu państwa i narodu polskiego*, ed. A. Pankowicz, Kraków 2002, pp. 155-173.
- Zbroja B., *Monumentalne i eleganckie – Aleje Trzech Wieszców*, in: *Modernizmy. Architektura nowoczesności w II Rzeczypospolitej*. Vol. 1. *Kraków i województwo krakowskie*, ed. A. Szczerski, Kraków 2013, pp. 119-163.
- Związek J., *Integracyjna rola Kościoła katolickiego na Ziemi Częstochowskiej*, in: *Błogosławione choć trudne czasy*, ed. J. Kowalski, Częstochowa 2000, p. 53.
- Związek J., *Z dziejów Częstochowskiego Seminarium Duchownego w Krakowie (1926-1991)*, “Veritati et Caritati,” No. 6 (2016), p. 351.
- Żebrok F., *Dzieje Śląskiego Seminarium Duchownego*, “Nasza Przeszłość”, 44 (1975), p. 90.



**Michał Szkoła**—graduate of the Faculty of History of the Jagiellonian University and Postgraduate Studies in the Conservation of Architecture and Urban Planning of the Cracow University of Technology, a long-term employee of the local conservation services, a doctoral student at the Faculty of Philosophy of the Jesuit University Ignatianum in Krakow.

**Ewa Kopec**

ORCID: 0000-0003-2118-9052

Jesuit University Ignatianum in Krakow

ekopec.edu@gmail.com

**Artur Wolanin**

ORCID: 0000-0001-9454-0291

Jesuit University Ignatianum in Krakow

artur.wolanin@hotmail.com

DOI: 10.35765/pk.2019.2704.08

## Significance of Strategic Alliances; the Case of Airline Alliances

### ABSTRACT

This article is poised to explain the significance, analyze and understand the relationships that are established between partners of a strategic alliance. The analysis conducted was modeled on the example of airline alliances. Airlines decide on operating as alliances due to economic benefits which they would not be able to reach on their own. In the result of their cooperation, these entities produce beneficial synergistic effects. It should be noted that by starting cooperation within an alliance, those entities still remain competitors. The analysis provides a comparison of three largest airline alliances: Star Alliance, SkyTeam and Oneworld. The article contains a summary of the most important conclusions of the analysis.

**KEY WORDS:** strategic airline alliance, air transport, consolidation, enterprise, globalization

### STRESZCZENIE

*Istota aliansów strategicznych na przykładzie aliansów lotniczych*

Celem artykułu jest objaśnienie istoty, analiza i poznanie związków, jakie zachodzą pomiędzy partnerami aliansu strategicznego.

W przeprowadzonej analizie za model przyjęto przykład aliansu lotniczego. Przedsiębiorstwa lotnicze decydują się na działalność w formie aliansu, ponieważ osiągają korzyści ekonomiczne, których nie byłyby w stanie uzyskać samodzielnie. W wyniku współdziałania podmiotów zachodzi pozytywny efekt synergii. Podejmując współpracę w formie aliansu, należy pamiętać, że przedsiębiorstwa współdziałają, pozostając równocześnie konkurentami. W analizie dokonano porównania trzech największych aliansów lotniczych: Star Alliance, SkyTeam oraz Oneworld. Artykuł zawiera zestawienie najważniejszych wniosków przeprowadzonej analizy.

**SŁOWA KLUCZE:** strategiczny alians lotniczy, transport lotniczy, konsolidacja, przedsiębiorstwo, globalizacja

## Introduction

The ongoing process of globalization and the ensuing growing competition of enterprises force market participants to seek new solutions to sustain their operations and explore new markets. It should be noted that to face the challenges of a new market situation, consolidations as well as other forms of partner activity emerge. The situation on the market exerts a decisive impact on the formation of strategic alliances.

Air transport is extremely capital-intensive, and yet very competitive. In addition, the expectations of passengers of airline carriers continue to grow. Hence, strategic airline alliances are perceived as a response to that situation. Due to their specific character and great significance of air transport for the countries, airline alliances have become a common form of operation. Those alliances are extremely flexible in terms of common perception of internal policy.

Alliances have a consistent internal structure and one mechanism working in the common interest. International policy within the area of transport is by no means simple and unambiguous, as it involves large differences in state policies in the realm of strict control of the access of foreign carriers to countries airspace, and concern for their domestic market. There also is another aspect, i.e. facilitating unrestricted operation of airlines beyond the borders of their home countries. Therefore, liberalization of aviation policy facilitates removing the obstacles and barriers to conducting aviation activity, with the resultant common access to air transport via budget carriers. Joining airline alliances facilitates compliance with the set requirements stipulated by the development of economy on the global scale.

This article aims to explain the significance of relations between partners in a strategic alliance, analyzing their motives and trying to understand them. Airline alliance allows increasing economic benefits for companies due to the synergy effect.

The hypothesis set forth in the article asserts that strategic alliances enhance the economic potential of airlines. The assumed theory stipulating that cooperation of a few entities helps to reach greater benefits than if they operated on their own was verified.

The hypothesis was verified by the case study of three largest airline alliances operating on the global market. The analysis helped to visualize the dependencies among Star Alliance, SkyTeam and Oneworld.

## The concept of a strategic alliance

There are numerous definitions of the strategic alliance circulated by the source literature. Nonetheless, they are ambiguous due to the specific character of such cooperation. M. Bengsson and S. Kock perceived cooperation as simultaneous competition and cooperation among the engaged competitors,<sup>1</sup> and even coined the term “coopetition.”

The notion of an alliance can be explained either in the broad or narrow meaning of the word. In the broad definition, alliances can be joined by the current or potential competitors as well as suppliers or clients. This means that almost any cooperation may rest on the premises of an alliance. In the narrow meaning, alliances may pertain to a limited number of enterprises which become real or potential competitors.<sup>2</sup> Nonetheless, it should be noted that each alliance involves at least two enterprises which remain independent from the legal point of view, and yet they employ a common strategy.<sup>3</sup> Consequently, the enterprises cooperating within the alliance framework are competitors working to reach common benefits.

Strategic alliances are characterized by three rudimentary features:<sup>4</sup>

- 
- 1 M. Bengsson, S. Kock, *Cooperation in Business Networks-Cooperate and Compete Simultaneously*, “Industrial Marketing Management,” No. 29 (2000), pp. 411-426.
  - 2 A. Pietruszka-Otryl, *Motywy tworzenia aliansów strategicznych przedsiębiorstw*, “Zeszyty Naukowe Akademii Ekonomicznej w Krakowie”, No. 647 (2004), p. 116.
  - 3 E. Todeva, D. Knoke, *Strategic Alliances and Models of Collaboration*, “Management Decision,” Vol. 43, No. 1 (2005), pp. 123-148.
  - 4 J. Kraciuk, *Alianse strategiczne jako sposób konsolidacji przedsiębiorstw*, SGGW, “Prace Naukowe,” No. 28 (2005), p. 498.

- fragmentation—alliance agreements generally pertain solely to a fragment of activity of alliance partners, and each enterprise conducts their own business irrespective the part covered by the contract;
- transfer of assets within coalition framework: in order to deliver their common projects, partners are obliged to provide tangible and intangible assets to the alliance. These include capital, infrastructure, knowledge, competencies or skills;
- integrity: cooperation agreement is so precise that amendments to the clauses require changes to other provisions.

J. Rymarczyk lists the following features of strategic alliances:<sup>5</sup>

1. A wide scope: the operation of enterprises taking part in the alliance focuses on numerous market segments (the whole market or a part thereof).
2. Cooperation of alliance partners: cooperation extends over a long timeframe, and enterprises concentrate on new, or potential directions of their functioning.
3. The number of partners: deciding on common, at times conflicting interests with a large number of partners proves to be extremely difficult.

As pointed out by J. Kraciuk, alliances are characterized by a number of specific features:<sup>6</sup>

1. Concluding an alliance is possible after prior consent of all the parties—the consent expressed by a written contract drawn between the parties or any other form admissible by applicable law in a given country.
2. Alliances join two, or more enterprises over a precisely defined territory of operation, scope of action or a project: those enterprises remain independent from the legal and formal point of view. To become operational, the made decisions must be approved by all alliance partners. Hence, it is prerequisite to set up decision centers responsible for coordination of cooperation to assure that all partners to the alliance function properly in organizational terms.
3. An alliance allows the partners reaching the benefits derived from concentration—the partners enjoy economies of scale by concentrating their forces on activities stipulated by the agreement.
4. By cooperation within the framework of an alliance, airlines face the inherent risk of conflicting interests and divergent targets—whilst the parties remain formally independent, the major targets

---

5 J. Rymarczyk, *Internacjonalizacja i globalizacja przedsiębiorstw*, PWE, Warszawa 2004, pp. 203-204.

6 J. Kraciuk, *Alianse strategiczne*, op. cit., pp. 501-502.

for which an alliance was set up are agreed by the partners, only to become the common targets for the whole group.

5. Enterprises make alliances to enjoy mutual economic benefits, while retaining individual targets of each member of the alliance. The legal provisions of the contracts remain individual for each member of the alliance. It is also easy to terminate the contract at any time, which provides an opportunity to withdraw from joint operations of an alliance as well as a possibility to return to them.

In line with the analysis of the definitions furnished by source literature, it may be concluded that strategic alliances present a special legal form of contracts and coalitions between the entities operating on a certain economic market.

Each alliance must have a clearly defined objective. An overall goal for all parties to the deal is maximization of profits. The ultimate goal for alliances is reaching tangible economic benefits and strengthening market position of alliance members. It should be noted that alliances do not have to be made by companies coming from the same sector of industry. Alliance members should fairly share their knowledge, and yet, maintaining an economic and formal balance among alliance members is prerequisite for the contract to survive. Once that balance is shaken, there is an inherent risk of a takeover, either friendly or hostile, where the stronger entity seizes control.<sup>7</sup>

## The motives for making strategic alliances

Making alliances has become more and more common. To survive on the market, the enterprises more and more often seek new lines of activity. The ongoing globalization of markets, due to the progress made in IT and communication technologies, has become one of the major reasons for making alliances.

The concept of globalization, despite its common application, has various meanings and embraces numerous aspects of economy and social life. As shown in many publications, globalization is the major factor facilitating a free flow of services, capital, labor and it influences the interaction of various social, cultural and political norms.<sup>8</sup>

---

7 J. Cygler, *Alianse strategiczne*, Difin, Warszawa 2002, p. 28.

8 H.A. Wako, *Economic Globalization, Institutions and Development. Essays on Aid, Foreign Direct Investment and Trade*, Datawyse 2018, p. 2.

Bringing the cited definition to the subject of considerations, it should be noted that enterprises must build their strategy of development and competition taking into account the current and future state of their environment, and their own potential for making use of the opportunities whilst counteracting the potential threats. As shown by the observation of the current market situation, in order to survive, an enterprise must search and enter new markets. The inherent high costs that are involved and the risk of failure indicate that a single enterprise is not able to shoulder them in full.

The ever-increasing risk of launching on foreign markets is aggravated by the growing competition. Enterprises adequately respond to the new situation on the market by deciding on operation within the framework of an alliance. Such form of cooperation allows sharing the costs and risk with the chosen partners.<sup>9</sup>

Airline alliances are peculiar by preserving autonomy and independence of all their members. Hence, even though partners compete with one another, they still realize common goals which could not be pursued once the alliance partners decided to operate on their own. A dynamic advancement of technology impeded the application of advanced solutions due to insufficient financial resources of enterprises. This is especially apparent in the hi-tech sectors of industry such as informatics, biotechnology and telecommunication.

The tab for launching a new version of a product can be very high. An enterprise, even if it is a market leader, may not shoulder such high costs of product development. The main determining factor propelling alliances is the fact that the costs and risks involved in the implementation of innovations are borne by a larger number of partners. Another reason for making strategic alliances is care for customers, who have increasing expectations towards quality and price of services.<sup>10</sup>

In light of the discussed considerations, it should be noted that global sectors are characterized by international competition, and the position of an enterprise in one country is dependent on its position in other countries.

The sectors of industry that demonstrate the greatest effect of globalization include aviation, computer industry, automotive industry, telecommunication and chemical industry. A significant feature of alliances is that each of the alliance members sustains its independence and autonomy. In other words, the members of alliances come together to reach

---

9 M. Romanowska, *Alianse strategiczne przedsiębiorstw*, PWE, Warszawa 1997, p. 43.

10 S. Zajas, B. Stefaniuk, *Alianse lotnicze*, Akademia Obrony Narodowej, Warszawa 2012, pp. 16-18.



common goals whilst preserving their autonomy and protecting their own interests.<sup>11</sup>

Strategic alliances involve both competition as well as cooperation, that is to say they are made among current or potential competitors. Hence, operation within that format requires the partners to cooperate for the duration of the alliance. It should be noted that the agendas are both explicit and hidden, short-term and long-term. The entities making alliances may be guided by specific agendas related to e.g. a geographic location. Apart from geographic location and economic premises, the agendas for making alliances include legislative differences, tourist attractiveness and national considerations.<sup>12</sup> Alliances, being a form of cooperation, are conducive to the process primarily due to synergy effect, i.e. the rule that says the whole is greater than the sum of its parts.<sup>13</sup>

## The types and significance of strategic alliances within airline services sector

Similarly, to the classification observed for management, where the goals are divided into strategic targets, tactical objectives and operational goals, airline alliances are divided into strategic ones, i.e. concerning long-term targets, and tactical ones, i.e. related to the implementation of short-term goals. Long-term strategic targets are most important for airline industry. Long-term alliances are poised to optimize operations and implement core objectives over a longer period.<sup>14</sup> However, it should be noted that in line with the current research results, strategic alliances are more proper than tactical ones.<sup>15</sup>

The strategic alliance in aviation is understood as a long-term undertaking, where two or more parties operating on the international competitive market sign a contract. In this case a minimum 5-year time frame is assumed, although the duration of the contract is not determined by formal or procedural premises. Strategic agenda of such partnership aims

---

11 J. Kraciuk, *Alianse strategiczne*, op. cit., pp. 500-501.

12 J. Cygler, *Alianse strategiczne*, op. cit., p. 34.

13 B. Kaczmarek, B. Glinkowska, *Tworzenie grup kapitałowych i aliansów strategicznych*, Wydawnictwo UŁ, Łódź 2012, p. 5.

14 S. Zajas, B. Stefaniuk, *Alianse lotnicze*, op. cit., pp. 24-25.

15 G.R. Milne, E.S. Iyer, S. Gooding-Williams, *Environmental organization alliance relationships within and across nonprofit, business, and government sectors*, "Journal of Public Policy & Marketing," Vol. 15 (1996), pp. 203-215.

to strengthen its position with competitors, suppliers and customers whilst sustaining entity's organizational and legal independence.<sup>16</sup> As explained by source literature, long-term strategic alliances are not the same as short or mid-term ones, and each of them has a peculiar significance. It is considered that short and mid-term alliances provide more freedom, require lesser exchange of assets, are more stable and less prone to conflict.

Short-term alliances are poised to maximize profits over a short period of time.<sup>17</sup> It should be noted that if the alliance lacks long time strategic perspective, its partners are not likely to gain much. Short-term alliance contract breeds strong distrust and it is characterized by the defensive stance of partners.<sup>18</sup>

The criteria for functioning of enterprises should be considered in the analysis of airline alliances. Within that scope, there is a clear distinction into capital and marketing alliances. The former requires one of the partners to have a stake in the capital of another. Over a long time, horizon, control exerted on the partner to alliance is a natural consequence. A stake in capital may be unilateral or mutual. In turn, marketing alliances consist in combining marketing potential to increase competitive edge, i.e. reaching tangible benefits generated by mutual improvement of the strengths of the partners. In practical terms, it boils down to setting up projects defining common areas of operation. Joint marketing operations may involve exploitation of aircraft or planning air transport. S. Zajas and B. Stefaniuk provide the following examples of alliance contracts:<sup>19</sup>

1. *Blocked space* (designating some passenger seats which are then blocked for the carrier partner; in practical terms, flights are made in the livery of one carrier according to the instructions of another to carry its passengers and freight on its account).
2. *Code-share* (designating a separate flight number by each alliance partner).
3. *Pool* (it denotes a certain type of cooperation, i.e. joint flights made by the carriers with the use of their own aircraft, in line with the principle that the revenues generated by the flights will be allocated to a joint account, either in part or in full).

---

16 E. Marcinkowska, *Globalizacja sektora usług transportu lotniczego*, SGH, Warszawa 2001, p. 79.

17 I. Szymajda, *Konkurencja w transporcie lotniczym. Prawo europejskie. Problemy dostosowania prawa polskiego*, Liber, Warszawa 2002, p. 39.

18 M.K. Rich, *Requirements for successful marketing alliances*, "Journal of Business & Industrial Marketing," Vol. 18 (2003), pp. 447-456.

19 S. Zajas, B. Stefaniuk, *Alianse lotnicze*, op. cit., p. 25; M. Żylicz, *Prawo lotnicze, międzynarodowe, europejskie i krajowe*, Wydawnictwo Prawnicze LexisNexis, Warszawa 2002, pp. 320-322; I. Szymajda, *Konkurencja w transporcie lotniczym*, op. cit., p. 39.

4. *Joint operations* (common use of the aircraft, of one or more carriers, on joint account, with the sharing of costs and receipts pursuant to the provisions stipulated by the contract, commonly with the use of a common livery).
5. *Franchising* (the license granted by one carrier to another to operate flights which are partially owned by one carrier. The license is granted for a fee and it gives a temporary right to sell services under the providing carrier's logo).<sup>20</sup>

As far as marketing alliances are concerned, it should be noted that they usually refer to mutual cooperation within the broadly understood organization of flights. In practical terms, this includes booking for the passengers of airlines. The main objectives of such cooperation comprise handling, check-ins, ground technical maintenance, overhauls, operational and technical support. In some case, the cooperation extends to mutual purchase policy.

In practice, there are also multifunctional *strong alliance option* contracts which involve a strong cooperation of airline carriers. Such contracts stipulate that even though the carriers preserve their identity, they strive to create a global carrier network. Alliances are created in stages, and the carriers begin by coordinating the flight schedules so that to avoid doubling of destinations.

The next stage involves common booking systems, check-ins and loyalty programs. Once those have been unified, the carriers agree on common tariffs and carrier capacities. The ultimate stage involves cost-cutting operations such as shared investment projects and setting up purchase groups. Another example includes ceding certain operations to partners. This type of cooperation is encumbered with a certain risk once a party to the contract decides to withdraw or terminate the contract. Such practice is most common for the related parties.

In summary, the presented above types of contracts help to strengthen the position of alliance partners against other competitors on the air transport market. Joint operation within the framework of alliance allows reaching better passenger seating rates which translates into higher efficiency of connections. For companies operating within the framework of alliance, winning a passenger is the ultimate goal. It has been proved that airline alliances have remained an unbeatable form of carrier activity. A global operator, i.e. the one that can pick passengers from various destinations in the world, must ensure a trip between remote destinations where a passenger is obliged to use only his services. Previously mentioned booking systems,

---

20 S. Zajas, B. Stefaniuk, *Alianse lotnicze*, op. cit., pp. 25-56.

sale of tickets and check-ins facilitate travel on a single ticket stock, where a passenger checks-in his luggage at the departure airport to the final destination and receives boarding passes for all legs of the trip.

For this moment, there are some airlines which do not belong to any major alliance. Emirate airlines have always stood the ground that they do not want to be a part of any formal alliances such as Star Alliance, One-world or SkyTeam due to the fact that their development plans and freedom in launching innovations would be in peril, and the scope for individual agreements negligible<sup>21</sup>. It is presumed that the share of alliances in the aviation market will grow owing to greater economic prospects, and a better offer for the customers.

### Case study of major contemporary airline alliances

At the onset of the 1990s, major airline operators realized that acting alone, they would not be able to meet all their customers' expectations. They observed that they should pull their resources to reach greater efficiency and generate economies of scale. Initially they decided on code-share contracts which proved to be insufficient over a longer period. Airlines required unified procedures, mostly IT systems, check-ins and global cooperation. These premises have become the driving factor for airline alliances.

In simple terms, airline alliance is an agreement between several or even a dozen airlines, usually from several continents, which ensures continual cooperation between the carriers. Such alliance aims to unify the passenger service system by creating, among others, common for all airlines check-in desks, coordination of flight schedules ensuring passengers a reduced waiting time for another call or having a common booking system, as well as the possibility of collecting prizes through loyalty programs during flights with all cooperating lines.

Currently there are three major airline alliances operating in the world:

- Star Alliance (established in 1992);
- OneWorld (established in 1998);
- SkyTeam (established in 1999).

*Star Alliance*<sup>TM</sup> is the first and the largest airline alliance with the global reach, providing 18,500 regular flights from 1,330 airports located in 182 countries.<sup>22</sup> In mid-1990s, Lufthansa, the largest air carrier, started

---

21 More in: <https://businessinsider.com.pl/firmy/strategie/star-alliance-oneworld-skyteam-sojusze-linii-lotniczych/nwjepw2> (access: 31.10.2018).

22 <https://www.airnewzealand.com/star-alliance> (access: 30.10.2018).

intensifying cooperation with air carriers all over the globe. The intention and the objective of the airline was commencing cooperation and drawing up partnership contracts with air carriers on the global scale.

In the initial stage of the project, Lufthansa embarked on the policy of cooperation with airlines which demonstrated similar business policy, convergent interests, and which provided similar, high standards of service. Within the framework of cooperation with four airlines, in 1997, Lufthansa set up Star Alliance whose primary objective was to provide better service to customers around the globe. Airlines coordinated their flight schedules, which often shortened total travel time for passengers. As a result, clients within one combined flight service could change one airline from the Star Alliance group to another.

This objective was reached by ticketing the whole leg of the flight and issuing boarding passes for further flights, even if the passengers were to board the aircraft of a different member of Star Alliance. This has become the first, all-world airline alliance which allowed access to the global network of flights. The alliance facilitated shorter, flexible, reliable and trouble-free travel.<sup>23</sup> The alliance responded to customer needs and growing customer dissatisfaction resulting from the hassle of changing planes and tedious steps that had to be taken before switching to another carrier. The passengers were yearning for better access to waiting lounges, loyalty programs honored by numerous carriers, and short waiting time for the connecting flight. Those expectations helped to elaborate a new approach to the organization of air transport.

In the first year of the alliance, five airlines became the members and founders of the enterprise: United Airlines, Scandinavian Airlines,<sup>24</sup> Air Canada, Lufthansa and Thai Airways. In 2003, the alliance was joined by Polish Airlines LOT.<sup>25</sup> As stipulated by its charter, Star Alliance was to ensure unlimited travel experience to its clients.<sup>26</sup>

Currently, Star Alliance brings not just clout, but also tangible economic benefits generated by cutting costs and sharing risk. Not only is it the largest alliance, but also a paragon of strong competitive position among air carriers on the global aviation market.

The alliance groups many largest global airlines as well as smaller, regional carriers. It should be noted that each airline preserves its individual

---

23 <https://www.sasgroup.net/en/alliances-and-partners-star-alliance/> (access: 06.11.2018).

24 <https://www.sasgroup.net/en/alliances-and-partners-star-alliance> (access: 06.10.2018).

25 <https://www.staralliance.com/documents/20184/680657/Star+Alliance+History/7880d0ac-455c-5ec6-4832-ee69e8037ff8> (access: 02.10.2018).

26 H. Chwistecka-Dudek, W. Sroka, *Alianse. Strategiczne problemy teorii i dylematy praktyki*, Biblioteka Menadżera, Kraków 2000, p. 183.

style and cultural identity, thus bringing to the alliance wealth of variety and multicultural aspects. All Star Alliance partners strive to maintain uniform, superior safety standards and customer service care.<sup>27</sup>

Members of Star Alliance (as of November 2018)<sup>28</sup>:

1. Adria Airways
2. Aegean Airlines
3. Air Canada
4. Air China
5. Air India
6. Air New Zealand
7. ANA
8. Asiana Airlines
9. Austrian Airlines
10. Avianca
11. Avianca Brasil
12. Brussels Airlines
13. Copa Airlines
14. Croatia Airlines
15. Egypt Air
16. Ethiopian Airlines
17. EVA Air
18. LOT Polish Airlines
19. Lufthansa
20. SAS
21. Shenzhen Airlines
22. Singapore Airlines
23. South African Airways
24. Swiss International
25. TAP Portugal
26. Thai Airways International
27. Turkish Airlines
28. United

---

<sup>27</sup> <https://www.staralliance.com/en/member-airlines> (access: 03.11.2018).

<sup>28</sup> <https://www.airnewzealand.com/star-alliance> (access: 03.11.2018).

Figure 1. Logos of Star Alliance™ members



Source: Author's own elaboration on the basis of: <https://www.staralliance.com/en/member-airlines> (access: 03.11.2018).

OneWorld® is another airline alliance grouping 13 leading global airline. The carriers of OneWorld provide 13,000 flights daily to over 1,000 destinations all over the world. OneWorld® was launched in 1999 by combining American Airlines, British Airways, Cathay Pacific and Qantas within the alliance framework. Since then, the alliance extended its reach by Finnair and Iberia in 1999, LAN (currently LATAM) in 2000, Japan Airlines and Royal Jordanian in 2007, S7 Airlines in 2010, Malaysian Airlines and Qatar Airways in 2013, and Sri Lankan Airlines in 2014.<sup>29</sup>

29 <https://www.oneworld.com/general/about-oneworld> (access: 03.11.2018).

OneWorld® strategic alliance implements the vision of generating more value for the clients, shareholders and staff than other airlines which are not grouped within that alliance. The mission of the alliance includes<sup>30</sup>:

- making global travel smoother, easier, better value and more rewarding;
- offering travel solutions beyond the reach of any airline's individual network;
- providing a common commitment to high standards of quality, service and safety;
- delivering its airlines with savings and benefits greater than any can achieve by itself.

The list of members of OneWorld® strategic alliance includes (as of November 2018)<sup>31</sup>:

1. American Airlines
2. British Airways
3. Cathay Pacific
4. Finnair
5. Iberia
6. Japan Airlines
7. LATAM
8. Malaysia Airlines
9. Qantas
10. Qatar Airways
11. Royal Jordanian
12. S7 Airlines
13. Sri Lankan Airlines

---

30 <https://www.oneworld.com/news-information/oneworld-fact-sheets/introduction-to-oneworld> (access: 06.11.2018).

31 <https://www.oneworld.com/member-airlines/overview> (access: 03.11.2018).



**Figure 2.** Logos of airlines which belong to OneWorld® strategic alliance



Source: Author's own elaboration on the basis of: <https://www.oneworld.com/general/about-oneworld> (access: 03.11.2018).

SkyTeam ranks third among global airline alliances. It offers its clients 16,609 flights daily to 1,074 airports in 177 countries.<sup>32</sup> The alliance brings to the clients more flights to various destinations, with higher frequency and better air connections.<sup>33</sup> Global SkyTeam was set up in June 2000 by four airlines: Aeroméxico, Air France, Delta Air Lines and Korean Air. In time, the alliance was joined by some other airlines. SkyTeam plans to launch connections to every destination in the world. It offers convenient connections in Europe, the US, Asia and Africa.<sup>34</sup>

SkyTeam groups the following members of the alliance (as of November 2018):

1. Aeroflot Russian Airlines
2. Aerolineas Argentinas
3. AeroMexico
4. AirEuropa
5. Air France
6. Alitalia
7. China Airlines
8. China Eastern Airlines
9. China Southern Airlines

---

32 <https://www.skyteam.com/en/about/> (access: 03.11.2018).

33 [http://nph.ceair.com/muovc/main/en\\_HK/Static\\_pages/AboutSkyTeam.html](http://nph.ceair.com/muovc/main/en_HK/Static_pages/AboutSkyTeam.html) (access: 03.11.2018).

34 <https://www.skyteam.com/en/about/history/> (access: 06.11.2018).

10. CSA Czech Airlines
11. Delta Air Lines
12. Garuda Indonesia
13. Kenya Airways
14. KLM Royal Dutch Airlines
15. Korean Air
16. MEA (Middle East Airlines—Lebanese airlines)
17. Saudi Arabian Airlines
18. Tarom Romanian Air Transport
19. Vietnam Airlines
20. Xiamen Air

Figure 3. Logos of SkyTeam strategic alliance airlines



Source: [http://nph.ceair.com/muovc/main/en\\_HK/Static\\_pages/AboutSkyTeam.html](http://nph.ceair.com/muovc/main/en_HK/Static_pages/AboutSkyTeam.html) (access: 03.11.2018).

## Conclusions

The analysis has shown undisputed benefits derived from participation in airline alliances. By means of strategic alliances, airline companies enhance their economic benefits owing to the synergy effect. Joint operations of companies generate much higher benefits than it would have been possible once they operated alone. This is particularly apparent in case of airline alliances.

Star Alliance group was the first on the market to join five independent carriers, aiming primarily at providing a better service to customers across the globe. In the result of such cooperation, Star Alliance managed to cut total time of air travel by coordinating its flight schedules. OneWorld, who came second as a global airline alliance, envisioned being the first to generate better value for clients, shareholders and the staff than other airlines operating beyond its framework.

By making alliances, its members could operate more efficiently, providing a better service to their passengers and flying to destinations which could not be reached by other airlines. In addition, airlines grouped within an alliance could offer more attractively priced tickets whilst upholding highest standards of service. SkyTeam, the third global airline alliance, was launched in 2000 in response to the changing environment. Setting up that alliance allowed its passengers enjoying better air connections and higher frequency of flights to more diverse destinations. SkyTeam comes first in terms of reaching every destination in the world. Consequently, the clients are encouraged to use the services of the airlines grouped within the framework of that alliance. As a result, the alliance has more clients, growing revenues and profits.

The motives pushing airlines to making alliances mostly included cutting costs and boosting revenues by providing clients with convenient services.

Air transport is extremely capital-intensive and highly competitive. Alliances that are made help the airlines to meet those requirements, and that business format allows sharing costs and risk with the chosen partners. A single airline, even if it is a market leader, is not able to shoulder such high costs. Within the alliance framework, those costs and the risk involved in the implementation of innovations are spread among a greater number of partners.

The foregoing analysis explains the significance of alliances and its importance for the alliance partners. It proves the hypothesis that by making alliances, airlines increase their economic potential. Once a few entities decide to cooperate, they reap greater benefits through synergy effect than if they decided to operate on their own. When the members of the alliance combine their forces by power of a contract, they enjoy the economies of scale.

Nonetheless, it should be noted that even though alliance members operate independently, their main targets stipulated by the alliance are agreed upon by all of them.

BIBLIOGRAPHY

- Bengsson M., Kock S., *Cooperation in Business Networks-Cooperate and Compete Simultaneously*, "Industrial Marketing Management," 2000, No. 29, pp. 411-426.
- Chwistecka-Dudek H., Sroka W., *Alianse strategiczne – problemy teorii i dylematy praktyki*, Biblioteka Menadżera, Kraków 2000.
- Cygler J., *Alianse strategiczne*, Difin, Warszawa 2002.
- Kaczmarek B., Glinkowska B., *Tworzenie grup kapitałowych i aliansów strategicznych*, Wydawnictwo UŁ, Łódź 2012.
- Kraciuk J., *Alianse strategiczne jako sposób konsolidacji przedsiębiorstw*, SGGW, "Prace Naukowe," 2005, No. 28, pp. 498, 501-502.
- Marcinkowska E., *Globalizacja sektora usług transportu lotniczego*, SGH, Warszawa 2001.
- Milne G.R., Iyer E.S., Gooding-Williams S., *Environmental organization alliance relationships within and across nonprofit, business, and government sectors*, "Journal of Public Policy & Marketing," 1996, 15, pp. 203-215.
- Pietruszka-Otryl A., *Motywy tworzenia aliansów strategicznych przedsiębiorstw*, "Zeszyty Naukowe Akademii Ekonomicznej w Krakowie," 2004, No. 647, p. 116.
- Rich M.K., *Requirements for successful marketing alliances*, "Journal of Business & Industrial Marketing," 2003, 18, pp. 447-456.
- Romanowska M., *Alianse strategiczne przedsiębiorstw*, PWE, Warszawa 1997.
- Rymarczyk J., *Internacjonalizacja i globalizacja przedsiębiorstw*, PWE, Warszawa 2004.
- Szymajda I., *Konkurencja w transporcie lotniczym. Prawo europejskie. Problemy dostosowania prawa polskiego*, Liber, Warszawa 2002.
- Todeva E., Knoke D., *Strategic Alliances and Models of Collaboration*, "Management Decision," 2005, Vol. 43, No. 1, pp. 123-148.
- Wako H.A., *Economic Globalization, Institutions and Development. Essays on Aid, Foreign Direct Investment and Trade*, Datawyse 2018.
- Zajas S., Stefaniuk B., *Alianse lotnicze*, Akademia Obrony Narodowej, Warszawa 2012.
- Żylicz M., *Prawo lotnicze, międzynarodowe, europejskie i krajowe*, Wydawnictwo Prawnicze LexisNexis, Warszawa 2002.

Netography

- [http://nph.ceair.com/muovc/main/en\\_HK/Static\\_pages/AboutSkyTeam.html](http://nph.ceair.com/muovc/main/en_HK/Static_pages/AboutSkyTeam.html) (access: 03.11.2018).
- <https://businessinsider.com.pl/firmy/strategie/star-alliance-oneworld-sky-team-sojusze-linii-lotniczych/nwjepw2> (access: 31.10.2018).
- <https://www.airnewzealand.com/star-alliance> (access: 03.11.2018).

<https://www.oneworld.com/general/about-oneworld> (access: 03.11.2018).  
<https://www.oneworld.com/member-airlines/overview> (access: 03.11.2018).  
<https://www.oneworld.com/news-information/oneworld-fact-sheets/introduction-to-oneworld> (access: 06.11.2018).  
<https://www.sasgroup.net/en/alliances-and-partners-star-alliance/> (access: 06.11.2018).  
<https://www.skyteam.com/en/about> (access: 03.11.2018).  
<https://www.skyteam.com/en/about/history/> (access: 06.11.2018).  
<https://www.staralliance.com/documents/20184/680657/Star+Alliance+History/7880d0ac-455c-5ee6-4832-ee69e8037ff8> (access: 02.10.2018).  
<https://www.staralliance.com/en/member-airlines> (access: 03.11.2018).



**Ewa Kopeć**—graduated from the Cracow University of Economics, and is currently employed at the faculty of the Institute of Political and Administrative Sciences at the Jesuit University Ignatianum in Krakow. In her research work, she focuses on determinants for functioning of organizations as well as the changes in the world economy. Her research publications to date focus mainly on the issues of shaping the value of enterprises, flow of capital in economy and ICT.



**Artur Wolanin**—a graduate of the Faculty of Management at the Cracow University of Economics. Received his MA degree in 2006, majoring in the Economics of Enterprises. Since 2009, the Administration Director at the Jesuit University Ignatianum in Krakow, and since 2011 also the President of the Ignatianum Foundation. Apart from holding administrative positions, since 2014 he has been a teacher and a researcher at the Faculty of Pedagogy of the Jesuit University Ignatianum in Krakow, the Chair of Administration and Social Policy. His research interests embrace a broad spectrum of management issues, including functioning of organizations. He is especially keen on higher education institutions which encouraged him to pursue his doctoral studies in 2014, and also prompted the choice of the subject for PhD dissertation.



**Nasri Messarra**

ORCID: 0000-0003-4166-0702

Université Saint-Joseph of Lebanon

nasri.messara@usj.edu.lb

**Anne Mione**

ORCID: 0000-0002-9286-2040

Université de Montpellier

anne.mione@umontpellier.fr

DOI: 10.35765/pk.2019.2704.09

---

# Negative WoM and its Transmission on OSN: The Determining Role of the Seeding Population

---

## ABSTRACT

This paper is a contribution to the knowledge of WoM transmission on OSN. We specifically analyze the role of the seeding population diffusion of negative WoM. The method is based on an experiment on the Facebook fan base of an existing company. We manage to control the four elements of a successful WoM communication: the message, the social structure of the network, the characteristics of the individuals in the network, and the seeding population. We develop an original method to dissociate a seeding population from the general population and compare the diffusion of a set of negative messages distributed to both the original population and the artificially targeted subset. Results show the impact of the seeding population's characteristics on the diffusion of consumers' negative messages. We specifically show the impact of the carrier on the virality of the message.

**KEY WORDS:** viral marketing, Negative Word of Mouth (NWOM), network engineering, Online Social Networks, Initial Seeding Population, Facebook

## STRESZCZENIE

### *Negatywne opinie oraz ich rozprzestrzenianie się w internetowych mediach społecznościowych: rola wyznacznikowa populacji początkowej*

Artykuł stanowi wkład w wiedzę dotyczącą transmisji WoM (*Word of Mouth*) w sieciach społecznościowych (OSN). Analizujemy w szczególności rolę rozprzestrzeniania się antyreklamy w populacji użytkowników. Metoda badawcza opiera się na eksperymencie wykonanym na społeczności fanów realnie istniejącej marki na Facebooku. Udało nam się poddać kontroli cztery elementy skutecznej komunikacji WoM: komunikat, strukturę społeczną sieci, charakterystykę jednostek w sieci, populację początkową (*seeding population*). Wypracowaliśmy autorską metodę wyodrębniania takiej populacji z ogółu oraz porównywania rozprzestrzeniania się zestawu negatywnych komunikatów dostarczonych zarówno populacji pierwotnej, jak i sztucznie wyznaczonemu jej podzbiorowi. Wyniki pokazują skutki oddziaływania cech populacji początkowej na wiralne rozprzestrzenianie się negatywnych opinii konsumentów. Ukazujemy w szczególności wpływ nośnika komunikatu na jego wiralność.

**SŁOWA KLUCZE:** marketing wirusowy, antyreklama (NWOM), zarządzanie siecią, media społecznościowe, Initial Seeding Population, Facebook

## Introduction

More and more companies see online social networks (OSN) as a necessary tool and are including these networks in their marketing strategy and management practices.<sup>1</sup> Yet, because they offer untampered communication, OSN can be a double-edged sword. This shift in control from companies and governments to end users of technology or “technology enabled collective action” or “smart mobs” was already announced by Howard Rheingold in 2002.<sup>2</sup> Brands have involuntarily relinquished control to online communities which are now targeting brands instead of

---

1 N.G. Barnes, A.M. Lescault, S. Wright, *Fortune 500 Are Bullish on Social Media*, University of Massachusetts Dartmouth, <http://www.umassd.edu/cmr/socialmediaresearch/2013fortune500>, 2013; C. Li, Bernoff J., *Groundswell: Winning in a world transformed by social technologies*, 2011.

2 H. Rheingold, *Smart mobs: The next social revolution*, Social Forces, Basic Books, 2007.



brands targeting them.<sup>3</sup> Pampers, Nestlé and other brands have already paid the heavy price of unsatisfied Facebook communities.<sup>4</sup>

Negative WoM transmitted by dissatisfied consumers has been studied largely in marketing before the development of OSN, mainly relatively to the preoccupation on satisfaction around the 1970s. Lazarsfeld (1955) had identified the role of leaders in disseminating information. Later, Rishing (1983) examined negative WoM of dissatisfied consumers and Singh offered a model based on Hirshman's framework for Exit, Voice and Loyalty (1990). The development of the Internet and then OSN gave another dimension to e-word of mouth with the preoccupation of e-reputation.<sup>5</sup> EWoM can now be considered as a marketing signal which is defined as an activity that provides information regarding unobservable aspects of a product.<sup>6</sup> Reputation of a brand or product is established through these marketing signals<sup>7</sup> that can be used as a strategic influence to convey or attack the reputation of a brand or product.

In this paper, we specifically explore the negative e-reputation WoM on Facebook. We republish negative messages from a brand's Facebook page on the timeline of fake profiles that have befriended engaged fans (likers and commenters) of the brand's page. We analyze the results of the diffusion of messages to this subset of the larger community on Facebook timelines and compare the results with the diffusion of the same messages on the brand's page.

The first part presents a review of literature on WoM and its transmission. We specify some elements on negative WoM. The second part exposes the method. Then we present the result and discuss them before concluding the paper.

## Negative WoM and its transmission

Negative WoM is a preoccupation for marketers in charge of the e-reputation. Firms and companies are now training people and using tools to

---

3 S. Fournier, J. Avery, *The uninvited brand*, "Business Horizons," 2011, 54, pp. 193-207. DOI: 10.1016/j.bushor.2011.01.001.

4 V. Champoux, J. Durgee, L. McGlynn, *Corporate Facebook pages: when "fans" attack*, "Journal of Business Strategy," 2012, 33, pp. 22-30. DOI:10.1108/02756661211206717; P. Gillin, *Attack of the Customers: The Pampers Dry Max Crisis*, 2012, 1-7; E. Steel, *Nestlé takes a beating on social-media sites*, "The Wall Street Journal," 2010.

5 H. Rheingold, *Smart mobs: The next social revolution*, op. cit.

6 P. Herbig, J. Milewicz, *The relationship of reputation and credibility to brand success*, "Journal of Consumer Marketing," 1993, 10, pp. 18-24. DOI: 10.1108/EUM0000000002601.

7 Ibidem.

monitor bad e-reputation messages.<sup>8</sup> Studies show that the organization of negative communication has a direct effect on brand evaluations.<sup>9</sup> On social networks, positive WoM occurs more frequently than negative WoM in different proportions depending on business category and market share.<sup>10</sup> East et al. estimate the ratio of positive WoM over negative WoM to be 3:1. However, negative WoM has a stronger influence on customers' brand evaluations than positive WOM Communication<sup>11</sup> due to negative information being considered more indicative of actual performance.<sup>12</sup> Naylor et al.<sup>13</sup> found that customers are more likely to diffuse negative WoM faster than positive WoM even if positive WoM occurs more frequently, showing that negative WoM is diffused more largely. Their findings came to support previous findings of Silverman.<sup>14</sup>

This negative WoM may indicate maneuvers of influence strategies led by competitors with malevolent intentions. In this perspective, the Internet is a "magma of influence" where every social node or organization is trying to influence others.<sup>15</sup> The advantages of online social networks in playing an influential role are numerous: communication speed, shorter social paths, targeted and direct one-to-one communication, etc. For instance, thanks to Facebook, the small-world effect and six degrees of separation dropped from 6 in the USA to 4.7 worldwide, significantly shortening the distance, in term of links between two random persons.<sup>16</sup> People and organizations are taking advantage of this situation, increasing power

- 
- 8 E. Cuvelier, M. Aufaure, *EVARIST : un outil de monitoring du buzz et de l' e-reputation sur Twitter 1 Introduction 2 Twitter et Micro-Blogging*, 2011.
  - 9 R.N. Laczniak, T.E. DeCarlo, S.N. Ramaswami, *Consumers' Responses to Negative Word-of-Mouth Communication: An Attribution Theory Perspective*, "Journal of Consumer Psychology," 2001, 11, pp. 57-73. DOI: 10.1207/S15327663JCP1101\_5.
  - 10 R. East, K. Hammond, M. Wright, *The relative incidence of positive and negative word of mouth: A multi-category study*, "International Journal of Research in Marketing," 2007, 24, pp. 175-184. DOI: 10.1016/j.ijresmar.2006.12.004.
  - 11 J. Arndt, *Role of product-related conversations in the diffusion of a new product*, "Journal of Marketing Research IV," 1967, pp. 291-295.
  - 12 M. Kamins, V. Folkes, L. Perner, *Consumer responses to rumors: Good news, bad news*, "Journal of Consumer Psychology," 1997, pp. 22-23. DOI: 10.1207/s15327663jcp0602.
  - 13 G. Naylor, S. Kleiser, *Negative versus positive word-of-mouth: An exception to the rule*, "Journal of Consumer Satisfaction," 2000.
  - 14 G. Silverman, *How to harness the awesome power of word of mouth*, "Direct Marketing Review November," 1997, 32-37.
  - 15 D. Heiderich, *Influence sur internet. Observatoire International des Crises*, 2009; E. Vaillle E., *La prise en compte du risque d opinion dans les stratégies d influences sur Internet*, 2010.
  - 16 J. Ugander, B. Karrer, L. Backstrom, C. Marlow, *The anatomy of the facebook social graph*, "arXiv," 2011, pp. 1-17.

and control of end users and communities.<sup>17</sup> Unlike traditional marketing, communication can now easily move both ways, top to bottom and bottom to top, and also create lateral channels between customers or groups of customers outside the control of the brand. Customers can reach and attack a company and force it to take action instantly<sup>18</sup> even using false accusations, as most readers, today, do not verify the authenticity of the information provided and often follow their instinct rather than minds.<sup>19</sup> The case of the Pampers attack is a significant example: without any scientific evidence, a group of unhappy customers declared war on Pampers on a Facebook page that quickly reached 11,000 dissatisfied customers. It took P&G more than a year to restore its lost trust. Dunn et al.<sup>20</sup> confirm that consumers are being influenced by WOM more than by any other source of information including peer reports, and that users transmit rumors frantically and cause significant damage to companies, especially when they use computer mediated communication.

It, therefore, becomes essential for marketers and communication strategists to understand the process of WoM diffusion. Hinz et al.<sup>21</sup> have identified four critical success factors behind viral marketing success: the content of a message, the social structure of the network, the behavioral characteristic of the recipients and the seeding strategy. Concerning these four factors, we observe the following elements:

1. The content of the message has been considered as a determining element in the success of its diffusion. Online communities rely massively on it as the main key of their WoM communication strategy.<sup>22</sup> Studies have analyzed the content through two dimensions, its attractiveness level and how memorable it can be.<sup>23</sup> This focus on the content of the message is however criticized by Hinz et al.<sup>24</sup> and

---

17 S. Fournier, J. Avery, *The uninvited brand*, op. cit.; H. Rheingold, *Smart mobs: The next social revolution*, op. cit.

18 V. Champoux, J. Durgee, L. McGlynn, *Corporate Facebook pages*, op. cit.

19 H. Dunn, C. Allen, *Rumors, urban legends and internet hoaxes*, Proceedings of the Annual Meeting of ..., 2005, pp. 85-91.

20 Ibidem.

21 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing: an empirical comparison*, "Journal of Marketing," 2011, 75, pp. 55-71.

22 J. Berger, K. Milkman, *What makes online content viral?* Available at SSRN 1528077 XLIX, 2009, pp. 192-205; M.J. Valos, D.H.B. Bednall, B. Callaghan, *The impact of Porter's strategy types on the role of market research and customer relationship management*, "Marketing Intelligence & Planning," 2007, 25, pp. 147-156. DOI:10.1108/02634500710737933.

23 J. Berger, K. Milkman, *What makes online content viral*, op. cit.

24 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

Valente and Myers<sup>25</sup> who observe that the other elements that drive viral marketing have often been neglected.

2. The structure of the social network is also identified as an important factor in the diffusion of a message. Bampo et al.<sup>26</sup> consider three different network structures, random, small world and scale free. Using simulations, they show that the spreading scheme is different depending on the size and connections of a social network.
3. The behavioral characteristics of the recipients and their incentives for sharing the message play an important part as well in the diffusion of the message:<sup>27</sup> From a social perspective, diffusion is strongly correlated to the behavioral characteristics of the recipients. While some scholars recommend targeting hubs to increase WOM,<sup>28</sup> others recommend focusing on the individual characteristics of each node as an opinion leader<sup>29</sup> or as an easily influenced person.<sup>30</sup> Booth and Matic<sup>31</sup> describe individuals in the network as “somebodies” and “nobodies” finding that it is the influencers who bring change. Watts and Dodds<sup>32</sup> alternatively suggest that it is a critical mass of easily influenced individuals who is the key to the formation of public opinion. Arndt<sup>33</sup> shows that the WOM pressure affects and is shared differently between high and low-risk perceivers, while Liu-Thompkins<sup>34</sup> finds that people with strong ties to the company are more likely to share WOM. Even if some research results may appear contradictory (should we target influencers, easily influenced people, hubs or strong ties?), it is clear that the behavioral characteristics of the recipients (will they share, comment,

---

25 T.W. Valente, R. Myers, *The Messenger is the Medium: Communication and Diffusion Principles in the Process of Behavior Change*, “Estudios Sobre las Culturas,” 2010, XVI, pp. 249-276.

26 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure of Digital Networks on Viral Marketing Performance*, “Information Systems Research,” 2008, 19, pp. 273-290. DOI: 10.1287/isre.1070.0152.

27 M. Kamins, V. Folkes, L. Perner, *Consumer responses to rumors*, op. cit.

28 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

29 T.W. Valente, *Network interventions*, “Science” (New York, N.Y.), 2012, 337, pp. 49-53. DOI:10.1126/science.1217330.

30 D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, “Journal of Consumer Research,” 2007, 34, pp. 441-458.

31 N. Booth, J. Matic, *Mapping and leveraging influencers in social media to shape corporate brand perceptions*, “Corporate Communications: An International Journal,” 2011.

32 D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, op. cit.

33 J. Arndt, *Role of product-related conversations*, op. cit.

34 Y. Liu-Thompkins, *Seeding viral content: The Role of Message and Network Factors*, “Journal of Advertising Research,” 2012, 52, 465. DOI: 10.2501/JAR-52-4-465-478.

like or avoid interactions), have an important role in the diffusion of WoM.

4. Finally, scholars agree that the initial seeding population is the key to an efficient viral marketing campaign.<sup>35</sup> The seeding strategy determines the initial set of target consumers chosen by the initiator of the campaign.<sup>36</sup> Recent studies suggest that the choice of seeds is more important than the size of the population and that, by targeting the right seeds rather than the whole population, better results are achieved.<sup>37</sup> Watts and Dodds<sup>38</sup> support this finding and state that influence is driven by a small group of easily influenced people and not by influential people. Again, Valente and Myers<sup>39</sup> suggest that influence is more about the messenger than the message itself). All of these studies seem to point to the fact that change is driven by the individuals or the small groups of individuals who carry the message, not by mass distribution of the information. Bampo and al.<sup>40</sup> write that the marketing challenge should be to target enough seeds with a high enough “epidemic threshold” to achieve campaign objectives without the unnecessary expense and possibly negative impact of flooding the target population with mass marketing.

On online social networks, marketers and researcher have no control over all four elements of viral marketing. While the marketer can control the content of his message, he is not in control, nor has the necessary data about the recipients of the message, their characteristics and the structure of the network. For example, on a Facebook page, based on a “secret” algorithm, only an undetermined part of the fans will see the message. Empirical experiments estimate this number to vary between 1% and 33% depending on the number of fans of the page amongst other factors.<sup>41</sup> Those

---

35 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.

36 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.

37 Y. Liu-Thompkins, *Seeding viral content*, op. cit.; D. Scarpi, *Does size matter? An examination of small and large web-based brand communities*, “Journal of Interactive Marketing,” 2010.

38 D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, op. cit.

39 T.W. Valente, R. Myers, *The Messenger is the Medium*, op. cit.

40 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.

41 Agorapulse, Facebook Page Barometer, 2015, <http://barometer.agorapulse.com/> (access: 05.12.2015); J. Constine, *Why Is Facebook Page Reach Decreasing? More Competition And Limited Attention*, 2014, <http://techcrunch.com/2014/04/03/the-filtered-feed-problem/>; J. Loomer, *No, Facebook Organic Page Reach Is Not Dead*, 2015, <http://www.jonloomer.com/2015/02/03/facebook-organic-page-reach-is-not-dead/>; S. Miller, *The Bigger the*

targeted fans are not necessarily hubs, influencers, or have any other special position in the network or characteristics as individuals. This is why posting on a Facebook page, even if distribution (post boost) can be fine-tuned to target fans of a specific gender, age group, etc., can be considered a distribution to a relatively random subset of a larger population. Because the marketer has no control over the seeding population, the structure of the network and the behavior characteristics of the recipients, the virality of the message is, to some extents, scientifically unpredictable.

Studies show that engaging in negative WOM is not a function of the amount of WOM activity.<sup>42</sup> In other words, in a defamatory campaign, the number of negative messages, posts or tweets, with analogous content to the same group, should not generate more NWoM. Studies also show that a well-organized negative communication has a direct effect on brand evaluations.<sup>43</sup> This implies that control and tweaking of the elements of viral marketing can increase the amount of negative communication generated through WoM compared to a non-optimized distribution of the same negative messages. Therefore, we decide to use the fans who interact frequently with the posts of the brand's Facebook page as the initial seeding population. We also use Facebook timelines instead of the brand's Facebook page to maximize distribution and control all the elements of viral communication. We re-post the same negative messages that were previously posted by dissatisfied fans on the Facebook brand's page without any modification. Finally, we compare the reach of the set of negative messages originally published on the brand's Facebook page to the reach of the same messages diffused through Facebook personal timelines to a meticulously selected seeding population.

For this experiment, we create and use two fake profiles (control over the messengers). Those fake profiles will befriend people who have commented or co-liked negative posts (control over the network structure). Because they have already engaged with negative messages, we presume that they will comment again on these messages if they are posted again (control over behavioral characteristics). After building our new network of engaged fans of the brand around our two fake profiles, we post negative messages to this seeding population (control over the sharing strategy).

In order to achieve this experiment, we contacted a company's manager who agreed, without the knowledge of any other staff member or

---

*Facebook Page, the Harder it is to Reach Fans*, 2013, <http://blogs.adobe.com/socialpractice/the-bigger-the-facebook-page-the-harder-it-is-to-reach-fans>.

42 G. Naylor, S. Kleiser, *Negative versus positive*, op. cit.

43 R.N. Laczniak, T.E. DeCarlo, S.N. Ramaswami, *Consumers' Responses*, op. cit.

consumer, to allow us to reuse the posts of fans on his company's Facebook page in order to test the reactions of his customer service department and social media manager. The use of an existing brand adds realism to the experiment and help us experiment a real-life situation.

## Methods

Our experiment uses the Facebook page and posts of a small European company that has around 1,500 fans. An analysis of the data insights provided by Facebook shows that between one and two new posts are published every week with an organic reach varying between 2 and 60% of the total fan population. On average, each post reaches 31% of fans. Facebook's defines engagement as the fact of clicking, liking, sharing or commenting on a Facebook message. Because we do not have access to the names or Facebook IDs of people who click on a message, in this experiment, we consider engagement as the fact of liking, commenting or sharing a message. User engagement by post varies between 0 and 130 fans engaging with likes, comments or shares. An analysis over the past year (2013) shows that thirty fans engage, in average, with each post.

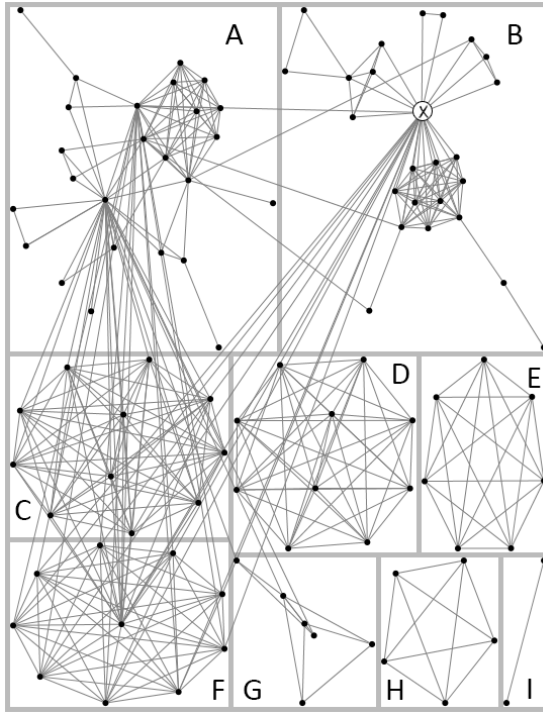
We extract all 500 posts published on the company's page and find that 72 unique fans are engaged in co-comments. This number is equal to 4.8% of the total number of fans (1,500) of the page. 711 unique fans are engaged in co-likes, evidencing that more than 47% of the total fan base interacts with posts on this Facebook page.

The density of the co-commenters graph is equal to 33%. In figure 1, we used NodeXL<sup>44</sup> to draw the social graph of co-commenters and group them by clusters (fans who comment on the same posts). We detect twelve clusters amongst which nine clusters, A, B, C, D, F and G, who are connected by bridges (fans who have joined the conversations of several clusters). For instance, fan "x" at the center of cluster B, has joined the conversations of fans in clusters A, C, F, D and G. We also notice three small completely independent clusters, E, H and I, representing 10.4% of the population, engaged in parallel discussions (could be posts related to specialty products, or discussions that are not of common interest). The density value and the bridges clearly illustrate high interaction between engaged fans.

---

44 D. Hansen, B. Shneiderman, M. Smith, *Analyzing social media networks with NodeXL: Insights from a connected world*, Proceedings of the ..., 2011.

Figure 1



Using the Facebook page of the brand to diffuse positive or negative WoM has four major drawbacks:

1. it makes it impossible to target engaging fans only or a subset of chosen individuals,
2. our posts can be deleted by the page's admins and our "users" banned,
3. our messenger will not be a "friend" or "acquaintance," rather "another consumer," and
4. based on empiric tests, the organic reach (Facebook free distribution of posts) on Facebook personal timelines<sup>45</sup> is much higher than the organic distribution on Facebook pages.<sup>46</sup>

We would like to demonstrate that, by creating a seeding population of engaged fans only and controlling the behavior characteristics of the

45 M. Bernstein, E. Bakshy, M. Burke, B. Karrer, *Quantifying the invisible audience in social networks*, "Proceedings of the SIGCHI," 2013.

46 Agorapulse, Facebook Page Barometer, 2015, op. cit.



members of the network (people who have already engaged in posts for this brand), we could increase the diffusion of NWoM. For this purpose, we create two fake Facebook profiles to infiltrate the network of engaged fans, enticing them to accept friendship. We use two fake profiles, the first one with the characteristics compiled by Barracuda Labs social networking analysis.<sup>47</sup> This research shows that 97% of fake profiles are young women, interested in both sexes, living in big cities, etc. Our first profile follows these “guidelines.” The second one has opposite characteristics: mature man in his sixties, married with children, etc. Both profiles have just a couple of photos published on their profile, and no posts or comments that could influence the decision to accept their friends’ requests. Their physical appearance and the fake names used may be considered as factors influencing the acceptance of friendship. Yet, our question is not in the reasons why our brand’s fans will accept to befriend those profiles but, in their reactions, once their new fake friends will start posting negative messages about the brand.

Both profiles were created from scratch without any friend at the beginning. In order not to influence fans in engaging with their comments, our fake profiles have not interacted in any way with the fans of the brand’s page throughout the experiment. We decide to send only standard friend request messages (no personal messages even as replies when private messages are sent to the fake profiles). We extract the names of all the fans who have engaged with the brand by commenting, liking or sharing posts on the brand’s Facebook page. Those fans are extracted using NodeXL’s social network importer.<sup>48</sup> We send friend requests to the 700 engaged fans extracted. To avoid suspicion, we do not send a friend request to the same person from both profiles simultaneously but, rather, do this almost randomly, deciding to send the request from the first or the second fake profile in no particular order and for no particular reason. We manage to befriend 187 engaged fans of the brand on the first profile (young woman) and 113 on the second profile (mature man).

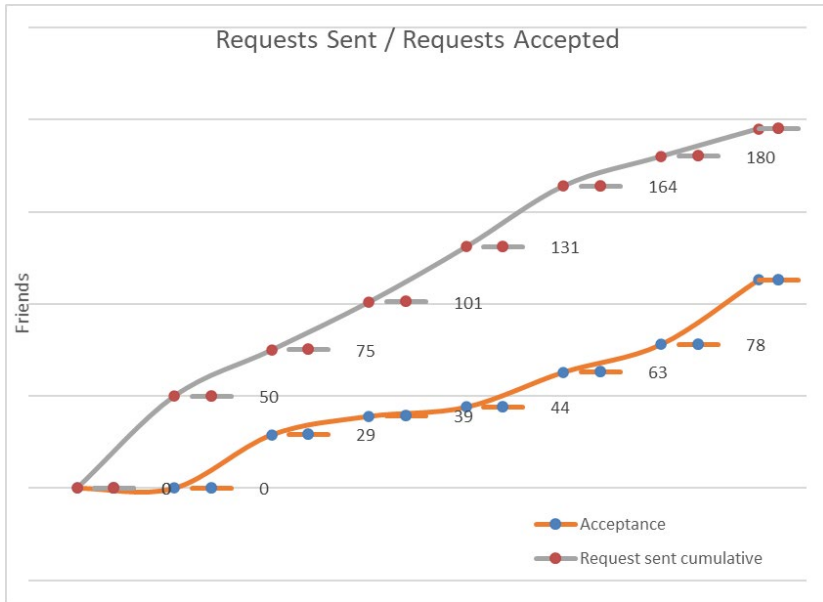
The graph below (figure 2) shows requests sent vs requests accepted on the second profile.

---

47 K. Krombholz, D. Merkl, E. Weippl, *Fake identities in social media: A case study on the sustainability of the Facebook business model*, “Journal of Service Science Research,” 2012, 4, pp. 175-212. DOI: <http://dx.doi.org/10.1007/s12927-012-0008-z>; F.Y. Rashid, *IT Security & Network Security News: Facebook Scammers Create Fake Profiles to Facebook Scammers Create Fake Profiles to Spam Users*, Click-Jacking ... eweek.com, 2012.

48 Social Media Research Foundation, Social Network Importer for NodeXL, 2015, <http://social-netimporter.codeplex.com>.

Figure 2



### The resulting global network

Using both profiles, we managed to befriend 300 engaged fans (commenters, likers, sharers) of the brand. The social graph below shows the networks of both profiles combined. Friends of the first profile are colored in dark blue and friends of the second profile in light blue. At the center, 30 dots represent mutual friends of both profiles.

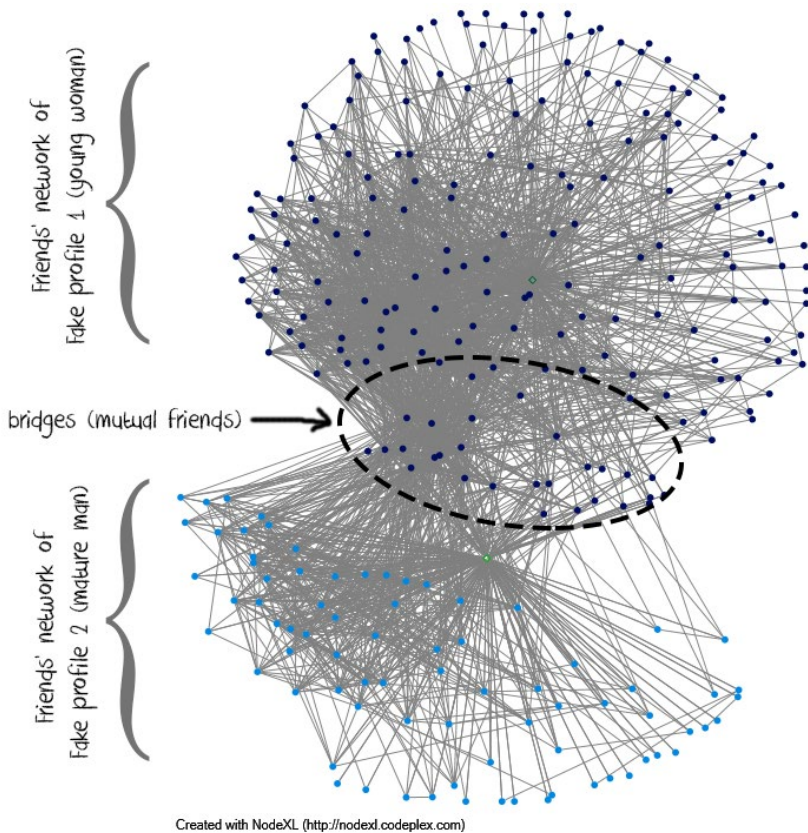
### Redistributing the messages to the seeding population

We reuse the last six negative customers' complaints from the brand's page and post them on our fake profile's timelines. We use the last six posts because of their recentness. We choose negative comments because negative WOM communication has a stronger influence on customers' brand evaluations than positive WOM Communication<sup>49</sup> due to negative

<sup>49</sup> J. Arndt, *Role of product-related conversations*, op. cit.

information being considered more indicative of actual performance.<sup>50</sup> If this experiment succeeds, the strategy should show a significant increase in NWOM. On the brand's page, these posts never received more than five likes each. We publish each post only once, as research has shown that engagement with negative WOM is not a function of the amount of WOM activity<sup>51</sup> and, just a few posts, published once, should be indicative of the outcomes of the method.

Figure 3



At this point of the experiment, we have control over the four elements essential for viral marketing strategy success:

---

50 M. Kamins, V. Folkes, L. Perner, *Consumer responses to rumors*, op. cit.

51 G. Naylor, S. Kleiser, *Negative versus positive*, op. cit.

1. The content: The purpose of the experiment is to compare negative WoM diffusion from a Facebook page to a personal timeline within a community of fans. Our intention is not to evaluate the content itself and we are not trying to evaluate the diffusion according to the attractiveness or memorable features of the messages. We rather intend to be close to reality and use existing messages rather than creating new ones. That is why we republish old messages from the Facebook brand's page to the fake profiles' timelines. This should allow us to compare the diffusion of the same messages on the Facebook page with a random population, and on Facebook timelines with an elected set of friends as a seeding population.
2. The social structure of the network: Using Facebook personal timelines (profiles) instead of Facebook pages allow us to determine the edges between the vertices of the network (A is friend with B), something constrained by Facebook when using the data extracted from a Facebook page. Our network has a short geodesic distance and strong ties (16 ties in average). Hinz et al.<sup>52</sup> assume that seeding to well-connected individuals is the most successful approach because these attractive seeding points are more likely to participate in viral marketing campaigns. Getting the brand's fans to become "friends" changes the structure of the network and the nature of the communication from consumer-to-consumer to friend-to-friend. Moving fans to Facebook timelines unlocks access to the social structure of the network.
3. The behavior characteristics of the recipients: We have only selected fans that already interacted with the messages we are resending. Those recipients have all liked or commented on those posts on the brand's page. We expect this group to interact again because pairs of individuals who interacted previously have greater opportunity to influence one another and have more aligned interests, which increases the chances of contagion.<sup>53</sup> Because of earlier interventions amongst its members, this group is a seeding population with an "epidemic threshold."<sup>54</sup>

---

52 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

53 E. Bakshy, I. Rosenn, C. Marlow, L. Adamic, *The role of social networks in information diffusion*, Proceedings of the 21st ..., 2012; J. Brown, P. Reingen, *Social ties and word-of-mouth referral behavior*, "Journal of Consumer research," 1987, pp. 350-363; S. Hill, F. Provost, C. Volinsky, *Network-Based Marketing: Identifying Likely Adopters via Consumer Networks*, "Statistical Science," 2006, 21, pp. 256-276. DOI: 10.1214/088342306000000222.

54 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.; D. Scarpi, *Does size matter?*, op. cit.

4. The seeding strategy: based on a study by Bernstein et al.,<sup>55</sup> each published post on a Facebook timeline reaches around 24% of the friends of the profile. We therefore expect our posts to reach 24% of the friend of each of our fake profiles. Moreover, seeding the same messages on a personal profile (a group of friends) rather than the brand's page (a group of consumers of the same product or lovers of the same brand) may be perceived as a "tweak to the environment" which is one of the elements that facilitates change.<sup>56</sup> Indeed, Heath and Heath suggest that by changing the environment to make tasks easier to perform may encourage those who are still hesitant to take action. In our case, by switching from a Facebook page where fans' comments are hard to find and are not displayed directly on their friends' newsfeed, to Facebook timelines where messages are directly posted to friends' newsfeed and can be liked or commented directly, we have shaped the environment to our advantage. Also, this environment change can be perceived by Facebook users as a change from a public environment (a Facebook brand's page) to a private place (the fake profiles' timelines). This is because users act as if their personal spaces on online social networks (newsfeed, timelines) are private.<sup>57</sup> By seeding to a selected set of engaged fans through Facebook timelines instead of a distribution on Facebook pages, we have optimized our seeding strategy on Facebook.

## Results

On our profiles' timelines, forty people rapidly engaged with the six published posts by liking or commenting on them. In the graphs below, we label our profiles "0" and "1" and the likers/commenters with numbers 2 to 40 and draw the social graph for each published post. We label our posts A to F. For Three of the statuses (B, D & E), each one of our profiles automatically likes or comments on the post of the other profile acting as a bridge between both social networks (his friends and the other profile's friends). These graphs show the engagement on each post of our profiles' friends, who represent our initial seeding population and are fans of the brand's page. We notice that some posts create more engagement than

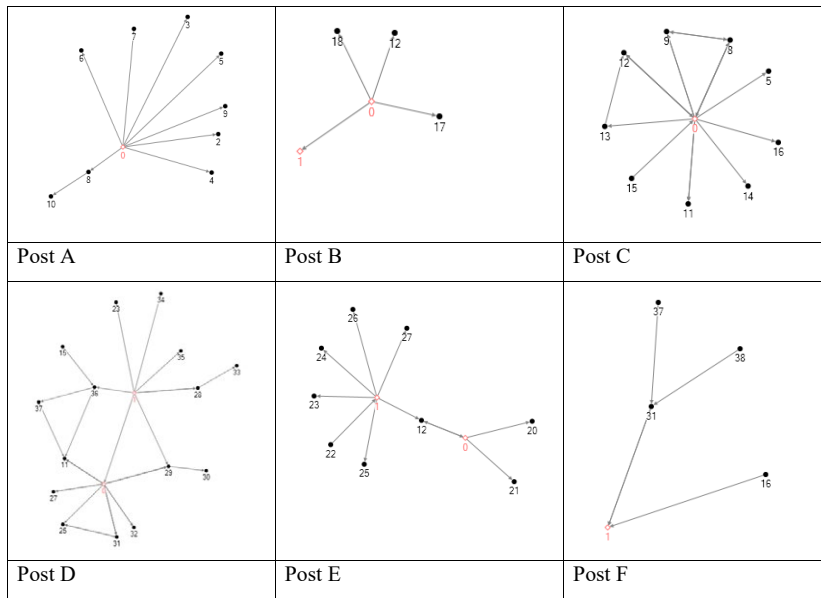
---

55 M. Bernstein, E. Bakshy, M. Burke, B. Karrer, *Quantifying the invisible audience*, op. cit.

56 C. Heath, D. Heath, *Switch: How to Change Things When Change Is Hard*, New York 2010.

57 E. Bassett, K. O'Riordan, *Ethics of Internet research: Contesting the human subjects research model*, "Ethics and Information Technology," 2002, pp. 1-16.

others, mainly C, D & E. In these posts, friends (or brand’s fans) not only engage with our created profiles but also with each other. For instance, in post D, friends 11, 36, 37 and 15 engage with each other in a discussion creating a connection between the friends of profile “0” and the friends of profile “1” and opening a new channel of discussion.

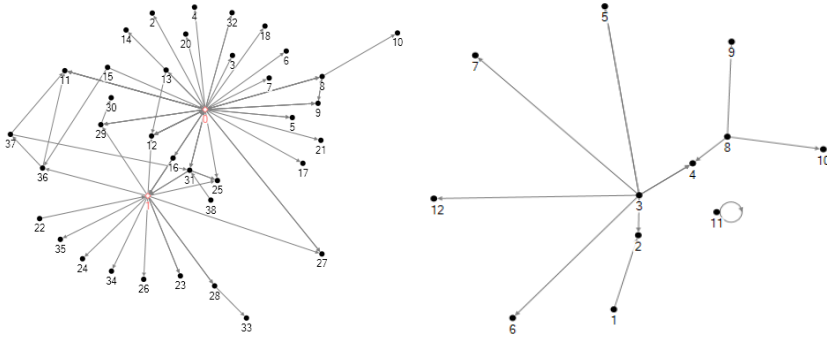


We evaluate the success of our method by combining the communications of all six posts on our fake profiles’ timelines in one graph and determine the metrics of the resulting graph using NodeXL<sup>58</sup>:

- There is one connected component meaning that both profiles generated one larger network of communication and influence or—as the graph shows—involved both networks in the same communication and acted as bridges between two sub-networks who react differently (we mentioned that our profiles have only 30 friends in common (around 10% of the total population of attracted fans). A deeper analysis showed that 33 engagement actions (comments/like) were made on the statuses or comments posted by one of our profiles and 44 engagement actions were made on the statuses or comments made by the other profile.
- 14.8% of edges (connections) are reciprocated showing that communication went back and forth between brand-engaged fans.

58 D. Hansen, B. Shneiderman, M. Smith, *Analyzing social media networks*, op. cit.

In comparison, the same 6 posts on the company’s page had significantly less interactions:



The following table shows the difference between the two strategies:

	Negative posts published on the brand’s Facebook page	Same negative posts published on fake profiles timelines using an optimized seeding strategy	Difference
Fans engaged	11	37 <sup>59</sup>	+236%
Engagement actions (likes, comments)	15	77	+413%
Reciprocation (back and forth communication and consumer to consumer communication)	0%	14.8%	+14.8%

Comparison of Facebook engagement using posts on the brand’s Facebook page and using a seeding population on Facebook timelines

The experiment showed that it is possible to attain higher engagement by targeting a small group of highly interacting fans on one or more Facebook personal profile rather than targeting the whole population of fans on the Facebook page of the brand. Using this technique, we were able to engage 236% more fans and generate 413% more WOM actions. This confirms the potential of this technique as an efficient NWoM marketing and e-reputation tool.

59 Not including our profiles.

## Implications for WOM

From a theoretical perspective, our experiment is consistent with the findings of Watts and Dodds<sup>60</sup> that large cascades of influence are driven by a critical mass of easily influenced people. We also contributed to the knowledge of the role of the initial seeding population. Indeed, a determinant factor in diffusing information on online social networks is the choice of the initial seeding population<sup>61</sup> especially with Facebook gradually decreasing the organic reach (free distribution) of brand's statuses and posts. These findings confirm that using an optimal seeding population as a seeding strategy results in higher WOM and influence.<sup>62</sup> Most importantly, we mentioned earlier in this paper that scholar suggest four critical viral marketing success factors: Content, structure of the social network, behavioral characteristics of the recipients and their incentive, and the seeding strategy.<sup>63</sup> At the end of this experiment, we suggest to add a fifth factor to the Hinz et al.'s list: the carrier. We know that consumers actively avoid traditional marketing methods and engage with peer and user-generated content.<sup>64</sup> These findings are confirmed by Sprague and Wells<sup>65</sup> who have observed a deeper impact of communication when the consumer perceives the source of the information as not being a marketer. In this experiment, the messengers have been be direct "friends" or "friends of friends."

The role of the messenger has previously been identified as a key to WoM success.<sup>66</sup> Valente et al.<sup>67</sup> consider that "the messenger is the message," suggesting that the message carrier's role in the diffusion may be even more important than the content of the message itself. Laczniak et al.<sup>68</sup> also suggests that receivers' attributions depend on the manner in which negative WoM is conveyed and that the source of information impacts the level

---

60 D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, op. cit.

61 Y. Liu-Thompkins, *Seeding viral content*, op. cit.

62 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.

63 O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

64 (Hann et al., 2008; O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

65 R. Sprague, M.E. Wells, *Regulating Online Buzz Marketing: Untangling a Web of Deceit*, "American Business Law Journal," 2010, 47, pp. 415-454. DOI: 10.1111/j.1744-1714.2010.01100.x.

66 Y. Liu-Thompkins, *Seeding viral content*, op. cit.; T.W. Valente, R. Myers, *The Messenger is the Medium*, op. cit.

67 T.W. Valente, R. Myers, *The Messenger is the Medium*, op. cit.

68 R.N. Laczniak, T.E. DeCarlo, S.N. Ramaswami, *Consumers' Responses*, op. cit.



of influence. Sprague and Wells<sup>69</sup> also found that customer-to-customer messages generate more trust, interactions and WoM.

Finally, our experiment suggested an innovative method that can be used on Facebook to control all five essential elements for a successful communication that would significantly increase negative WOM. This method can be reused by marketers and researchers to have a deeper understanding of the inner workings of negative WOM on Facebook. Malevolent attackers could use this method to circumvent standard prevention methods, like banning fans from a page or locking the brand's page for comments and posts. The usage of this type of information vector should be investigated more closely as a model of diffusion but also as a dangerous diffusion model to be aware of in case of e-reputation attacks.

We believe that this strategic approach that has, to the best of our knowledge, never been studied from a marketing perspective could define new methods and techniques to efficiently target and influence communities, control the flow of information to different subset of the community at different times. For example, a marketer could target satisfied customers with a message and unsatisfied customers with another. He could also choose to target a specified number of users at a given time and then wait before sending the same group a second message. He could also use the same technique to benchmark the effect of a message on different communities.

## Limitations and future research directions

This experiment showed that grouping engaged users and diffusing information organically to an optimized seeding population results in higher interaction and engagement.

Our approach and its methods may raise two ethical questions: we have performed a malevolent attack against a company (1) and the subjects were not aware of the experiment (2). Regarding the first point, the General Manager of the company knew about the experiment and was its sponsor. He also followed the whole process closely.

Regarding the second point, we mainly republish existing messages to a subset of the population that was initially targeted by those messages. We have just enhanced the distribution and WoM of existing messages without modifying their content. In this matter, Hey<sup>70</sup> states that there is

---

69 R. Sprague, M.E. Wells, *Regulating Online Buzz Marketing*, op. cit.

70 J.D. Hey, *Experimental economics and deception: A comment*, "Journal of Economic Psychology," 1998, 19, 397-401. DOI: 10.1016/S0167-4870(98)00013-0.

a big difference between telling a lie and not telling subjects about one or more elements of the research. For him, withholding information does not necessarily constitute deception.

On another hand, the main element we concealed was the fact that our profiles were fake. Such practices are not uncommon on Facebook and, even Facebook itself is performing sociological experiments on its users to test their reactions.<sup>71</sup> Different tests conducted on blog members' participation by Hudson and Bruckman<sup>72</sup> showed that people are much less likely to act naturally if they are aware of the experiment. They also discuss the bystander effect in such cases, meaning that people would rather wait for others to help.<sup>73</sup> By disclosing the nature of our fake profiles, we would have discouraged people from befriending them or engaging with their posts. We believe that information diffusion on online social networks will evolve with time and that companies, brands, and public figures should understand the methods that may be employed and use them to their advantage, or protect themselves from malevolent attacks. This experiment provides scholars a framework for understanding how firms can be discredited on Facebook using this technique and enables them to understand, use and, eventually, imagine ways to counteract this special type of communication vectors.

This experiment draws methodological and theoretical lessons that can also be discussed. While most experiments on Facebook revolve around the idea of a network of friends or acquaintances, we have transformed engaged users into friends. In our approach, we look at a Facebook profile not only socially but also strategically. Our fake profiles attracted an initial seeding population of engaged fans, initiated a reaction by diffusing information and worked as a vector in the network to increase the rate of fans' actions.

This experiment also draws some legitimate questions: knowing that the described method increases negative WoM, how does it really affect sales or trust in the brand? Also, with negative WoM being 14 times less influential when it comes to purchase probability<sup>74</sup> can this method be used

---

71 E. Bakshy, I. Rosenn, C. Marlow, L. Adamic, *The role of social networks*, op. cit.; N. Lee, *Facebook used you like a lab rat and you probably don't care*, Engadget International Editions, 2014, <http://www.engadget.com/2014/07/01/facebook-experiment>.

72 J. Hudson, A. Bruckman, *Using empirical data to reason about internet research ethics*, ECSCW 2005.

73 J.M. Hudson, A.S. Bruckman, *The Bystander Effect: A Lens for Understanding Patterns of Participation*, "Journal of the Learning Sciences," 2004, 13, pp. 165-195. DOI: 10.1207/s15327809jls1302\_2.

74 R. Vázquez-Casielles, L. Suárez-Álvarez, A.B. del Río-Lanza, *The word of mouth dynamic: How positive (and Negative) WOM drives purchase probability: An analysis of interpersonal and non-interpersonal factors*, "Journal of Advertising Research," 2013, 53, pp. 43-60. DOI:10.2501/JAR-53-1-043-060.

with positive WoM as a marketing or advertising strategy? These questions are left for future research or experiments.

## Conclusion

Information diffusion on Facebook can be hazardous, uncertain and cause unexpected results especially if marketers focus on the message only. Diffusion success and virality depend on four other important elements: the social structure of the network,<sup>75</sup> the behavior characteristics of the recipients and their incentives for sharing or receiving the message,<sup>76</sup> and the seeding strategy which determines the initially targeted population.<sup>77</sup> To these four elements, we have added the messenger himself<sup>78</sup> as an element of viral marketing success. Many scholars agree that the key to success in information diffusion is influencing the influencer<sup>79</sup> or even influencing a critical mass of easily influenced individuals<sup>80</sup> and using strategy to target an optimized initial seeding population.<sup>81</sup> Also, the information of peers tends to be more contagious than the information diffused by brands or similar source<sup>82</sup> and diffusing negative information to an optimized seeding population of consumers on a profile page results in a much higher negative WoM than diffusing the same information on the brand's page.

This paper exposed a technique that malevolent attackers could use to control the elements of viral marketing on Facebook and use them to increase diffusion of negative WoM. Companies, governments and people should worry about such strategies that could be used on online social networks, in this case, Facebook, to increase negative WoM generated by fans and hurt their online reputation.

---

75 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.

76 J. Arndt, *Role of product-related conversations*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.

77 M. Bampo, M.T. Ewing, D.R. Mather, D. Stewart, M. Wallace, *The Effects of the Social Structure*, op. cit.; Y. Liu-Thompkins, *Seeding viral content*, op. cit.

78 T.W. Valente, R. Myers, *The Messenger is the Medium*, op. cit.

79 A. Galeotti, S. Goyal, *Influencing the influencers: a theory of strategic diffusion*, "The RAND Journal of Economics," 2009, 40, pp. 509-532. DOI: 10.1111/j.1756-2171.2009.00075.x.; O. Hinz, B. Skiera, C. Barrot, J. Becker, *Seeding strategies for viral marketing*, op. cit.

80 D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, op. cit.

81 Y. Liu-Thompkins, *Seeding viral content*, op. cit.

82 T.W. Valente, R. Myers, *The Messenger is the Medium*, op. cit.; D. Watts, P. Dodds, *Influentials, networks, and public opinion formation*, op. cit.

BIBLIOGRAPHY

- Agorapulse, Facebook Page Barometer, 2015, <http://barometer.agorapulse.com/> (access: 05.12.2015).
- Arndt J., *Role of product-related conversations in the diffusion of a new product*, "Journal of Marketing Research IV," 1967, pp. 291-295.
- Bakshy E., Rosenn I., Marlow C., Adamic L., *The role of social networks in information diffusion*, Proceedings of the 21st ..., 2012.
- Bampo M., Ewing M.T., Mather D.R., Stewart D., Wallace M., *The Effects of the Social Structure of Digital Networks on Viral Marketing Performance*, "Information Systems Research," 2008, 19, pp. 273-290. DOI: 10.1287/isre.1070.0152.
- Barnes N.G., Lescault A.M., Wright S., *Fortune 500 Are Bullish on Social Media*, University of Massachusetts Dartmouth, <http://www.umassd.edu/cmr/socialmediaresearch/2013fortune500>, 2013.
- Bassett E., O'Riordan K., *Ethics of Internet research: Contesting the human subjects research model*, "Ethics and Information Technology," 2002, pp. 1-16.
- Berger J., Milkman K., *What makes online content viral? Available at SSRN 1528077 XLIX*, 2009, pp. 192-205.
- Bernstein M., Bakshy E., Burke M., Karrer B., *Quantifying the invisible audience in social networks*, "Proceedings of the SIGCHI," 2013.
- Booth N., Matic J., *Mapping and leveraging influencers in social media to shape corporate brand perceptions*, "Corporate Communications: An International Journal," 2011.
- Brown J., Reingen P., *Social ties and word-of-mouth referral behavior*, "Journal of Consumer research," 1987, pp. 350-363.
- Champoux V., Durgee J., McGlynn L., *Corporate Facebook pages: when "fans" attack*, "Journal of Business Strategy," 2012, 33, pp. 22-30. DOI:10.1108/02756661211206717.
- Constine J., *Why Is Facebook Page Reach Decreasing? More Competition and Limited Attention*, 2014, <http://techcrunch.com/2014/04/03/the-filtered-feed-problem>.
- Cuvelier E., Aufaure M., *EVARIST : un outil de monitoring du buzz et de l'e-reputation sur Twitter 1 Introduction 2 Twitter et Micro-Blogging*, 2011.
- Dunn H., Allen C., *Rumors, urban legends and internet hoaxes*, Proceedings of the Annual Meeting of ..., 2005, pp. 85-91.
- East R., Hammond K., Wright M., *The relative incidence of positive and negative word of mouth: A multi-category study*, "International Journal of Research in Marketing," 2007, 24, pp. 175-184. DOI: 10.1016/j.ijresmar.2006.12.004.
- Fournier S., Avery J., *The uninvited brand*, "Business Horizons," 2011, 54, pp. 193-207. DOI: 10.1016/j.bushor.2011.01.001.
- Galeotti A., Goyal S., *Influencing the influencers: a theory of strategic diffusion*, "The RAND Journal of Economics," 2009, 40, pp. 509-532. DOI: 10.1111/j.1756-2171.2009.00075.x.

- Gillin P., *Attack of the Customers: The Pampers Dry Max Crisis*, 2012, 1-7.
- Hann I.-H., Hui K.-L., Lee S.-Y.T., Png I.P.L., *Consumer Privacy and Marketing Avoidance: A Static Model*, "Management Science," 2008, 54, pp. 1094-1103. DOI: 10.1287/mnsc.1070.0837.
- Hansen D., Shneiderman B., Smith M., *Analyzing social media networks with NodeXL: Insights from a connected world*, Proceedings of the ..., 2011.
- Heath C., Heath D., *Switch: How to Change Things When Change Is Hard*, New York 2010.
- Heiderich D., *Influence sur internet. Observatoire International des Crises*, 2009.
- Herbig P., Milewicz J., *The relationship of reputation and credibility to brand success*, "Journal of Consumer Marketing," 1993, 10, pp. 18-24. DOI: 10.1108/EUM0000000002601.
- Hey J.D., *Experimental economics and deception: A comment*, "Journal of Economic Psychology," 1998, 19, 397-401. DOI: 10.1016/S0167-4870(98)00013-0.
- Hill S., Provost F., Volinsky C., *Network-Based Marketing: Identifying Likely Adopters via Consumer Networks*, "Statistical Science," 2006, 21, pp. 256-276. DOI: 10.1214/088342306000000222.
- Hinz O., Skiera B., Barrot C., Becker J., *Seeding strategies for viral marketing: an empirical comparison*, "Journal of Marketing," 2011, 75, pp. 55-71.
- Hudson J., Bruckman A., *Using empirical data to reason about internet research ethics*, ECSCW 2005.
- Hudson J.M., Bruckman A.S., *The Bystander Effect: A Lens for Understanding Patterns of Participation*, "Journal of the Learning Sciences," 2004, 13, pp. 165-195. DOI: 10.1207/s15327809jls1302\_2.
- Kamins M., Folkes V., Perner L., *Consumer responses to rumors: Good news, bad news*, "Journal of Consumer Psychology," 1997, pp. 22-23. DOI: 10.1207/s15327663jcp0602.
- Krombholz K., Merkl D., Weippl E., *Fake identities in social media: A case study on the sustainability of the Facebook business model*, "Journal of Service Science Research," 2012, 4, pp. 175-212. DOI: <http://dx.doi.org/10.1007/s12927-012-0008-z>.
- Laczniak R.N., DeCarlo T.E., Ramaswami S.N., *Consumers' Responses to Negative Word-of-Mouth Communication: An Attribution Theory Perspective*, "Journal of Consumer Psychology," 2001, 11, pp. 57-73. DOI: 10.1207/S15327663JCP1101\_5.
- Lee N., *Facebook used you like a lab rat and you probably don't care*, Engadget International Editions, 2014, <http://www.engadget.com/2014/07/01/facebook-experiment>.
- Li C., Bernoff J., *Groundswell: Winning in a world transformed by social technologies*, 2011.
- Liu-Thompkins Y., *Seeding viral content: The Role of Message and Network Factors*, "Journal of Advertising Research," 2012, 52, 465. DOI: 10.2501/JAR-52-4-465-478.

- Loomer J., *No, Facebook Organic Page Reach Is Not Dead*, 2015, <http://www.jonloomer.com/2015/02/03/facebook-organic-page-reach-is-not-dead>.
- Miller S., *The Bigger the Facebook Page, the Harder it is to Reach Fans*, 2013, <http://blogs.adobe.com/socialpractice/the-bigger-the-facebook-page-the-harder-it-is-to-reach-fans>.
- Naylor G., Kleiser S., *Negative versus positive word-of-mouth: An exception to the rule*, "Journal of Consumer Satisfaction," 2000.
- Rashid, F.Y., *IT Security & Network Security News: Facebook Scammers Create Fake Profiles to Facebook Scammers Create Fake Profiles to Spam Users, Click-Jacking ...* eweek.com, 2012.
- Rheingold H., *Smart mobs: The next social revolution*, Social Forces. Basic Books, 2007.
- Scarpi, D., *Does size matter? An examination of small and large web-based brand communities*, "Journal of Interactive Marketing," 2010.
- Silverman G., *How to harness the awesome power of word of mouth*, "Direct Marketing Review November," 1997, 32-37.
- Social Media Research Foundation, *Social Network Importer for NodeXL*, 2015, <http://socialnetimporter.codeplex.com>.
- Sprague R., Wells M.E., *Regulating Online Buzz Marketing: Untangling a Web of Deceit*, "American Business Law Journal," 2010, 47, pp. 415-454. DOI: 10.1111/j.1744-1714.2010.01100.x.
- Steel E., *Nestlé takes a beating on social-media sites*, "The Wall Street Journal," 2010.
- Ugander J., Karrer B., Backstrom L., Marlow C., *The anatomy of the Facebook social graph*, "arXiv," 2011, pp. 1-17.
- Vaille E., *La prise en compte du risque d'opinion dans les stratégies d'influences sur Internet*, 2010.
- Valente T.W., *Network interventions*, "Science" (New York, N.Y.), 2012, 337, pp. 49-53. DOI:10.1126/science.1217330
- Valente T.W., Myers R., *The Messenger is the Medium: Communication and Diffusion Principles in the Process of Behavior Change*, "Estudios Sobre las Culturas," 2010, XVI, pp. 249-276.
- Valos M.J., Bednall D.H.B., Callaghan B., *The impact of Porter's strategy types on the role of market research and customer relationship management*, "Marketing Intelligence & Planning," 2007, 25, pp. 147-156. DOI:10.1108/02634500710737933
- Vázquez-Casielles R., Suárez-Álvarez L., del Río-Lanza A.B., *The word of mouth dynamic: How positive (and Negative) WOM drives purchase probability: An analysis of interpersonal and non-interpersonal factors*, "Journal of Advertising Research," 2013, 53, pp. 43-60. DOI:10.2501/JAR-53-1-043-060.
- Watts D., Dodds P., *Influentials, networks, and public opinion formation*, "Journal of Consumer Research," 2007, 34, pp. 441-458.



**Nasri Messarra**—Full time Assistant Professor at the Saint-Joseph University of Beirut (Lebanon). He teaches digital marketing strategies and social networks analysis. He also directs the Master in Information and Communication program at the University. As a researcher, he focuses on social networks analysis, mainly Twitter discussions, and digital marketing.



**Anne Mione**—Full Professor at Montpellier University. She teaches strategic marketing, quality management and strategy. She directs the Retail Strategic Management Master. Her main research relates to standards, certifications and quality labels and she specifically observes the firm strategies in the emergence, diffusion and competition between standards and rival networks. She published a book on standardization strategies and focus now on cooperation on standardization. She also wrote articles in journals such as *M@n@gement*, *Management International*, *International Journal of Entrepreneurship and Small Business*, *Science Direct-TransTech Publications*, *Journal of Innovation Economics and Management*.





Krzysztof Koehler

<http://orcid.org/000-0002-5189-2454>

Cardinal Stefan Wyszyński University in Warsaw

[krzykoe@wp.pl](mailto:krzykoe@wp.pl)

DOI: 10.35765/pk.2019.2704.11

## Old Polish Writers and Freedom of Expression. Reconnaissance

### ABSTRACT

The paper discusses the question of freedom of speech as an important topic in old Polish literature. The author considers the problem of whether freedom of speech was one of civil liberties recognized by old Polish writers as characteristic for the political consciousness of the nobility in the early modern era. Discussing several cases (Franciszek Karpiński, Wespazjan Kochowski, Jan Chryzostom Pasek, and Stanisław Orzechowski), the author indicates the inalienable relationship between the awareness of freedom of speech and the old nobility's moral sentiments.

**KEY WORDS:** liberty, literary freedom, old Polish literature, Polish nobility culture, Jan Kochanowski, Wespazjan Kochowski, Jan Chryzostom Pasek

### STRESZCZENIE

#### *Pisarze staropolscy a wolność wypowiedzi. Rekoniesans*

W pracy omawiane jest zagadnienie wolności wypowiedzi jako tematu w literaturze staropolskiej. Autor rozważa zagadnienie, czy wolność wypowiedzi to jedna z dostrzegalnych przez pisarzy staropolskich wolności obywatelskich, charakterystycznych dla świadomości politycznej szlachty. Omawiając kilka przypadków (Franciszek Karpiński, Wespazjan Kochowski, Jan Chryzostom Pasek czy Stanisław Orzechowski), autor wskazuje na niezbywalną

zależność świadomości wolności wypowiedzi i szlacheckiego od-  
czucia moralnego.

SŁOWA KLUCZE: wolność, niezależność twórcy, literatura  
staropolska, kultura szlachecka,  
Jan Kochanowski, Wespazjan Kochowski,  
Jan Chryzostom Pasek

As is well known, the words “... the louder he sang and not subject to anyone” come from the program poem of Jan Kochanowski, *Muse*.<sup>1</sup> The poet expresses his writing credo therein, by constructing (so characteristic of his era) a vision of independence or creative independence. Kochanowski places the quoted words in the context of a dispute with personified Jealousy, which, with its characteristic attitude of besserwisem, “translates” rather unkindly towards the creator, what the lyrical subject means when he talks about creative independence: “I know what’s going on, rhyme writer! You’d like to take it!”

In response to such insinuations, the poet points to the three necessary aspects of creative “independence” and autonomy: this “non-compliance” is based on financial independence resulting from: family inheritance, the ability to “live a modest life” and finally—a subtle and non-invasive concept artistic patronage of Piotr Myszkowski. I think that these three aspects form the essence of considerations about artistic freedom (i.e. also civic freedom) in the Polish-Lithuanian Commonwealth: the first is the freedom of possession (and possession provides civic freedoms, a sense of economic security and—most importantly—the experience of security in the state, protection of the law), the second—it has an ethical dimension (free philosophical choice, the choice of which will be based on the concept of *otium* in its various philosophical or artistic realizations), and the third—freedom from external potential oppression, be it a patron or any other external authority towards the subject.

I will try to apply these three aspects of reasoning about freedom to the category of freedom of speech (freedom of artistic expression) in the Polish-Lithuanian Commonwealth. I will call the authors as witnesses, limiting my comments to the minimum necessary.

---

1 Cf. R. Krzywy, *Sztuka wyborów i dar inwencji. Studium o strukturze gatunkowej poematów Jana Kochanowskiego*, Warszawa 2008 ([www.Staropolska.pl/renesans/opracowania/Krzywy\\_Muza1.html](http://www.Staropolska.pl/renesans/opracowania/Krzywy_Muza1.html)); many works on the subject of *Muse* have been created; I would particularly like to draw attention to W. Weintraub’s dissertation, *Muza i mamona*, in: *Nowe studia o Janie Kochanowskim*, epilogue T. Ulewicz, Kraków 1991.

In this text, I dare to put forward a thesis which I will try to support that the issue of “independence” and the associated sense of “creative freedom” in the Commonwealth not only in the sphere of topos or rhetorical figures, but in a clear and obvious way resulting thereof, how the noble community thought about freedom (about their freedoms). Moreover, the feeling, experiencing or reflection on the creative act, creative freedoms in the Polish-Lithuanian Commonwealth was a reflection, image or in some sense a component of reasoning about civic independence within the social or political self-reflection of the Polish nobility.

First of all, however, I owe the reader a short terminological justification. As we know, “not being subject” in the sense of state independence does not appear in the political language of the Old Polish period. In the referred quotation from Kochanowski, it appears as a denial of “submission.” Of course, “submission” appears in the dictionaries of early modern writers. However, it rather appears with the meanings given by Old Polish dictionaries: *Słownik polszczyzny XVI wieku* to *Słownik języka polskiego* by Linde. In the sense used by Kochanowski in “The Muse,” the term is mentioned by Skarga as “being subject to someone” rather in the social space, within one political structure: “Inequality is compensated by order and submission.” Moreover, the royal preacher, sees one of the most important elements of the state structure in “submission”: “Without these three things you can never reach consent or a united homeland. Without inequality, without being subject to one another, without one leader and creator.”<sup>2</sup>

Linde at the very end of the description of the word “subordination,” referring only to *Gazeta Rządowa*, mentions the negated form, understood presently as “the whole, freedom, independence of the homeland.”

This fact is known to researchers of the subject: in the “state” sense “subordination/independence” did not exist in the dictionary of the Commonwealth. It had to be lost for the word to appear in the dictionaries and in the language.

However, the question arises about how the issue of political sovereignty of the state before the appearance of the term “independence” was defined. It is worth recalling that state sovereignty (lack of subordination) was one of the most important elements of reflection for republican thought. Without this, the question of practicing civil liberties in the state would have not been discussed.

The concept of *civitas libera* within the reasoning for freedom in the state results from the most important principle that allows the realization of

---

2 *Słownik polszczyzny XVI wieku*, <https://spxvi.edu.pl/index/haslo/85440>.

freedom: it is about the lack of domination. Here is how Dorota Pietrzyk-Reeves interprets this problem according to Philip Pettit:

[Republican theory of freedom] understanding freedom not as a lack of interference, but as a lack of dominance understood as the relationship of master and slave or master and servant in which the dominant party (master) can arbitrarily interfere in the affairs of the party which is his (slave or servant),

and below states as follows:

the freedom we are looking for in the republican tradition is freedom, not security or participation, and the contrast of liber and servus, a free and subordinate man is essential.<sup>3</sup>

I think that from this perspective, looking at the issue of freedom, we will be able to consider the issue of freedom of expression in the same way. Because if “in practice, it was primarily about the fact that life, honor and wealth of the citizen were not subject to the arbitrary will of some sort of self-ruler,”<sup>4</sup> then the issue of freedom of expression belongs to those values that are particularly exposed to the threat of attempting to impose this dominance.

As mentioned above, the sine qua non condition of this practice of freedom was state sovereignty. The paradigm of republican thinking assumed that

the Republic of Poland was a free state, i.e. it was not subject to anyone’s dependence or any external superior, it was guided by its own will, in which citizens had a part.<sup>5</sup>

Searching for the vocabulary that addressed this issue, we come across terms such as “it does not accept any authority ... free kingdom, freeman, and should owe nothing to anyone.”<sup>6</sup> Similarly claimed Orzechowski in his “Speech to the Polish Nobility.”

We probably touch the basic term for the description of the relationship here: „owe someone.” For example, Linde cites two testimonies of

---

3 D. Pietrzyk-Reeves, *Ład Rzeczypospolitej: polska myśl polityczna XVI wieku a klasyczna tradycja republikańska*, Kraków 2012, p. 264.

4 Ibidem, pp. 264-265.

5 Ibidem, pp. 259.

6 Anonim Senator, cit. acc. to D. Pietrzyk-Reeves, *Ład Rzeczypospolitej*, op. cit., p. 259.

historical writers herein: Strykowski and Bielski, maybe it is worth quoting them in whole:

Rzezański princes in a free state have long ruled freely, and should have no monarchs. (Strykowski); and Bielski: There were great differences between Silesia, Hungary and the Czech Republic regarding obedience and who should rule Silesia.

In noble reasoning, the Polish kingdom was not obligated to any outside person, and it was only for this reason that freedom could be realized, including freedom of speech in the state.

How deeply rooted was the thinking about the inalienable connection of this independence of the political organism from external domination with freedom of expression (i.e. exercising freedom within the state structure), it is clearly testified by the words of writers who have experienced the violence of “external sovereignty.”

It is worth starting with a well-known statement by Franciszek Karpiński in a letter to Jan Albertrandi of 20 August 1801. We read a kind of reflection about the freedom of performing art:

However, under foreign rule once a free Pole, how can he write when his hands are tied? Or who was chosen as a speaker and must watch every word? Freedom is only in the nations allowing free speech and being bold, not being cautious about many things, probably not much said ...<sup>7</sup>

Roman Soból summarizes this dissertation: “The decision to leave the lute was the result of ... belief that the writer’s civic freedom is a prerequisite for creativity.”<sup>8</sup>

The vision of Karpiński’s survival of Polish culture under the partitions was not optimistic. In the poem *To Prince Miłolaj Repnin*, however, written after the spectacular “shattering” of the lute, Karpiński presents his historical vision in which there is no place for Polish literary culture:

This language and these poems in Polish words  
Maybe will not be known on earth in a hundred years.<sup>9</sup>

---

7 *Correspondence of F. Karpiński dated 1763–1825*. Collected and prepared for printing by T. Mikulski, comment by R. Sobol, Wrocław 1958, pp. 113–114.

8 R. Sobol, *Franciszek Karpiński*, Warszawa, p. 1979, pp. 129–130.

9 F. Karpiński, *Dziela*, Warszawa 1830, p. 182, *Do Xiążęcia Miłolaja Repnina, Jenerala gubernatora Litwy 1796*.

The fall of the state was to end its literature, the consequence of the fall of political independence was to be the death of the language, the end of culture. I refer to this testimony to outline the context of perhaps an important image (as claimed by Soból or other researchers, not entirely isolated among representatives of that generation), which is an expression of the belief in the inalienable relationship between a bold creative statement and independence in its state dimension.

One should probably look for the sources of this reasoning in the tradition of the First Republic of Poland, with the rhetoric of freedom dominating in social debate. Pisze o tym Edward Opaliński a ostatnio też przecież Anna Grzeškowiak-Krwawicz.<sup>10</sup>

In this context, it is worth pointing out such significant statements as, for example, Stanisław Orzechowski's *Mowa do szlachty polskiej*, i.e. an introduction to *Statuty* of Jakub Przyłuski or an introduction to the *Statuty i przywileje koronne* of Jan Herburt of Fulsztyn. Anonymous author of probably the most interesting texts in the Old Polish period specific anthology of expression (and historical narratives) related to the issue of freedoms, *Krótkie zebranie rzeczy potrzebnych z strony wolności*. As we know, this work, published in a very interesting interregnum after the death of Stefan Batory and before the dramatic election in 1587, is a kind of anthology of statements and deeds of historical figures referring to freedom. An important aspect of these quoted speeches, statements or descriptions is the issue of admonishing the ruler as the implementation of the principle of freedom of expression. The author often describes these actions with the terms "libere coping," "admonition" etc. (cf. especially anecdotes related to Casimir the Great,<sup>11</sup> p. 48, 52 etc.) An anonymous author builds a kind of story about civic disobedience, civic vigilance against all alleged potential threats lurking for Polish freedoms. Activism, the designed dynamism of civic attitude, first of all, assumed the direct involvement of citizens in the political process (hence the frequent—especially in the 17th century—criticism of the civic attitude of *désintéressement* in relation to political activity). In the context of these comments, the stanzas of Bonawentura Małowieski acquire a different sense, on the experience of the state's fall:

Forbidden using own language  
The name of a Pole changed into Prussian,

---

10 E. Opaliński, *Kultura polityczna szlachty polskiej w latach 1587-1652*, Warszawa 1995, pp. 80-83; A. Grzeškowiak-Krwawicz, *Dyskurs polityczny Rzeczypospolitej Obojga Narodów. Pojęcia i idee*, Toruń 2018 (especially see the term "freedom"), pp. 139-173

11 *Krótkie rzeczy potrzebnych z strony wolności a swobód polskich zebranie przez tego, który wszego dobrego życzy ojczyźnie swojej*, in: *Krzysztofa Warszawickiego i Anonima uwagi o wolności szlacheckiej*, ed. K. Kochler, Kraków 2010, p. 48, 52 and other.

Everything is foreign, I don't understand the law,  
I pay but for what I cannot say ...  
I feel lawless, but live without power  
I cannot advise or give help ...<sup>12</sup>

Karpiński's experience of losing political freedoms (freedom of speech) and the experience of lawlessness (i.e., if I understand the poet correctly, the experience of losing the possibility of political activity ("I cannot advise") brings a sense of powerlessness and strangeness (also because the subject in the poem "does not understand the law"). "Strangeness at home"—as we guess—stems precisely from the experience of lost values, which were recognized and experienced as the foundations, principles of the citizen's functioning in the state.

This inalienable relationship of freedom and political activity with the freedom of expression is confirmed by Marcin Błażewski, who claims in *Tłumacz Rokoszowy*:

Freedom is to live as one wants, safely in own home  
Apart from God, laws and judgements, not being subject to anyone.  
To have a free place in the brotherly circle of speech  
To suffer no offence at collective reunions.<sup>13</sup>

Based on the quotation, it is clear that the issue of freedom of speech is related to *negotium* rather than *otium*. It should also be pointed out that the experience of freedom of expression is associated with community and social activity, which is probably related to the civic use of the word in the discourse, maybe it is too big word, but one can probably speak about political discourse. And given that Małowieski's words revealed a sense of legal agency, one more conclusion can be made that practicing freedom of speech was associated with an action, activity, and actions ("advising," "giving help," etc.)

A specific and characteristic interpretation of the relationship between the practice of freedom of expression and the constitutional principles of the state was presented by priest Benedykt Chmielowski, when he defined the iconography of Polish freedoms in *Nowe Ateny*:

Poles in Gniezno at the coronation of Bolesław the Brave displayed the silver Statue of Liberty in the gate, with a gold tongue, i.e. libertate in speaking in *libero voto*, which is the tastiest fruit of Poles ... and origo from this statue of the Golden Freedom.<sup>14</sup>

---

12 Cf. K. Koehler, *Domek szlachecki w literaturze polskiej epoki klasycznej*, Kraków 2005, p. 415.

13 Cit. E. Opaliński, *Kultura polityczna*, op. cit., p. 84.

14 B. Chmielowski, *Nowe Ateny*..., pt. II, ed. 1746, p. 374.

Therefore, I assume that we are talking about a certain constant intellectual propensity.

Nevertheless, it may be worth trying to check how relations between the sense of freedom of expression (also artistic) and the public sphere are implemented in practice.

The first testimony that I would like to refer to is dated 1676 and it refers to a trial known in the history of literature brought by the Krakow bishop against the Krakow Academy in the case for censorship. The subject or pretext to initiate proceedings was criticism of the work of the academic censor on the occasion of the publication of *Niepróżnujące próżnowanie* by Wespazjan Kochowski.

For literary historians, there is no doubt that the dispute over Kochowski's book was a pretext in a proper competence dispute between the bishop and the rector for the right to censor books. Historians also have no doubt that the bishop was right in the argument. Nevertheless, I believe that if the pretext for the dispute was not just a book by Wespazjan Kochowski, a local nobleman, a well-known and well-deserved neighbor, perhaps the dispute could have settled in a different direction. Nevertheless, as it is known, the poet did not want to treat the matter as an excuse: so he announced *Informacje* about violation of his noble honor ("I am asking for honor, which is equivalent with health for me, as my reputation is per literas partam")<sup>15</sup> to the regional councils of Małopolska and Sandomierz in Proszowice and Opatów and asks the nobility, brothers to support his case.

Maria Eustachiewicz (in a polemic dissertation with the considerations of the Kochowski's monographist Jan Czubek<sup>16</sup>) presents quite accurately the arguments used by Kochowski in *Informacja* to the regional councils in defense of his position. There are several arguments of a genealogical nature, if it could be said so. I will not analyze them, but there are two that shed some light on the matter of interest to us.

One says that the violation of the academy's right to censorship would affect the stability of the legal principles of the Republic of Poland. The argument is only rhetorical; it is the use of a cliché (antiquity) that allows to torpedo all ideas of reform in the state; it refers to noble (parliamentary!) legislative conservatism or persuasion (and that it has the value of persuasion, already noted in the 16th century, e.g. by Andrzej Frycz Modrzewski) a sense of antiquity, order and traditionalism. The piquancy is added to this argument by the fact that it is essentially a completely unsuccessful

---

15 Quotes from *Instrykcja* originate from the work of Maria Eustachiewicz and Wiesław Majewski, *Nad lirykami Wespazjana Kochowskiego*, Wrocław 1986.

16 Jan Czubek describes his dispute over the book in his monograph of the poet; cf. J. Czubek, *Wespazjan z Kochowa Kochowski*, Kraków 1909, pp. 126-130.



argument: the bishop is associated with antiquity, not the academy. (This is also what the Academy's monograph Henryk Barycz claims<sup>17</sup>).

The second argument is even more interesting for the issue we are discussing:

Kochowski claims that he was accused, not the censor, for the reason that *ex rogo librorum fama autorum fulsit* (we need Tacitus to construct this argument). If a book has an author, and they have a "mutual relationship," then an attack on the book (through or without a censor) is an attack on the author's good fame, and therefore let everyone think what *gravamen ex praemissis* occurs to anyone who wants *bonis actibus notescere* in this homeland.<sup>18</sup>

Therefore, any violation of freedom of expression (accusation, e.g. of indecency or other alleged misconduct) is an attack on noble fame and an attack on good name and civic merits can be recognized. It is worth noting that Kochowski naturally combines his civic merits (he is a respected citizen, a nobleman-knight, performing various functions in the community) with his activity in the field of writing.

As Eustachiewicz rightly points out, it was not the "literary" arguments, but those noble and civic ones that defended "the honor of a nobleman" that were included in the instructions for Małopolska deputies to the Sejm the following year. Therefore, a fellow nobleman is defended in the assembly and delegates are sent to the Crown Sejm with instructions on asking for a citizen of the Sandomierz region *de Reipublica armis et literis meriti*. Maybe it is worth recalling that this state defence takes place according to a fairly frequently used pattern of conduct: a classic example of it is told by Stanisław Orzechowski in his *Roczniki*, the history of the defense of the "fellow nobleman" and the priest at the same time by the brothers against the attempts at his civil liberties by the bishop of Przemyśl Jan Dziaduski.<sup>19</sup> The noble neighbors support Orzechowski, just as Kochanowski. As we know, noble state solidarity (as Janusz Tazbir and other scholars dealing with the issue have written about many times<sup>20</sup>) not only strongly influenced political life but also had considerable significance in the area of religious disputes in the Commonwealth, contributing to the

---

17 H. Barycz, *Uniwersytet Jagielloński w roli cenzora*, in: *Szkice z dziejów Uniwersytetu Jagiellońskiego*, Kraków 1933, pp. 130-133; cf. M. Eustachiewicz, W. Majewski, *Nad lirykami*, op. cit., p. 28.

18 M. Eustachiewicz, W. Majewski, *Nad lirykami*, op. cit., p. 31.

19 Cf. K. Koehler, *Stanisław Orzechowski i dylematy humanizmu renesansowego*, Kraków 2004, p. 318.

20 Cf. J. Tazbir, *Państwo bez stosów. Szkice z dziejów tolerancji w Polsce w XVI-XVII w.*, Warszawa 1967, passim.

disputes characteristic of the history of the Commonwealth all in all, however, not aggressive and deprived of religious violence so typical of Western history.

Therefore, I believe that the reference plane for the sense of freedom of expression, “not being subject to anyone” in the creative process in the Old Polish (pre-partition) period is the sense of civic subjectivity, but also the “boldness” or courage of citizens’ statements so interestingly described by Karpiński. And in this context, it is worth recalling another testimony.

Everyone who reads the *Pamiętniki* of Jan Chrysostom Pasek is struck by a kind of “cheekiness” or even “impertinence” of the narrator of this text, who, after all, consciously creates a certain linguistic reality. I should now deal with the difficult to describe stylistics of Pasek’s expression, its energy, which Adam Mickiewicz so praised in *Wykłady paryskie*.<sup>21</sup> To illustrate what I mean (and probably what Karpiński referred to, who—like few authors of the 18th century perfectly understood the power of Old Polish language)—I will only point to one anecdote written by Pasek, showing—as in the lens—the verbal power of this culture.

So, the narrator and character of *Pamiętniki* in his descriptions from 1661 is detained without proof of guilt by the royal guards, forcibly imprisoned in an inn under guard in Grodno and interrogated as a potential MP from the confederate army. The interrogation is conducted by the senator of the kingdom: the monarch himself listens. The narrative by the author leaves no doubt: it actually consists of short situational descriptions and a series of speeches, given by the defendant and interrogators. From an external perspective (from outside, if one agrees to say so, the discourse of the Polish-Lithuanian Commonwealth), the situation is bizarre:

here a twenty-year-old soldier stands in front of bishops, province governors—candle holders of the crown. Nevertheless (in Pasek’s story, of course), the advantage is not on the side of the accusers, but on the side of the accused. The thing is that—as the writer says—*in open innocence, on a voluntary basis, unconvinced by law, taken, incarcerated ...*<sup>22</sup>

Therefore, the law was violated and it seems that this very situation, which makes the defendant a victim of violation of the law, drives the dramatic axis, if one can say so, of the entire conflict. Indeed, Pasek could have been a member of the confederate army, but before he was detained, a court sentence was required. The narrator’s position is clearly defined by

---

21 Cf. A. Mickiewicz, *Wykłady paryskie*, rok 2, lekcja 3.

22 J.Ch. Pasek, *Pamiętniki*, <https://wolnelektury.pl/media/book/pdf/pamietniki.pdf> (access: 27.12.2018).

a fragment of his speech: "... I will be able to admonish everyone equal by birth. I have regional councils, I have tribunals, I have a general circle; *utraque civis*, because I am both a nobleman and a soldier, I can never deny my words." Thus, by all means, senators try to force Pasek to plead guilty. They threaten him, insult him, but in response they hear only bold answers and even more blatant insults towards themselves. At the threat of secret death, they hear:

God, the army and my poor personnel will perceive my innocence, because I have the blood ties, feeling for a long time that I am a nobleman. I will lay my head, my teeth and *nominis recordation* ...

The author creates a fairly colorful novel around these speeches, full of twists and turns: when those who stopped him fail to prove the "guilt" of the nobleman, they try to get him to escape, simply encouraging him, removing guards, and finally negotiate through one of the senators a compromise solution to the case, which, after all, could have—as we understand—further consequences, if an unlawfully detained nobleman wanted to assert his rights in the said "tribunals" or in the "general circle." It may be worth recalling the narrator's response to this proposal (he was supposed to plead guilty, for which he was to obtain royal grace):

One God who created the heavens and the Lord and me, a poor man, let me do it as a protector *innocentiae*, when virtue and honesty cannot prove ... I already said so to the audience that the court may bark at God's passion. Neither a threat nor the request of my fanciful *dominari* cannot. Upon request, the sun will not become the moon, the truth will not be transformed into untruth; and for a threat, God sees I will not give in one step, even if I had to suffer here for my innocence.

It is worth noting how Pasek's arguments associate freedom (I am a nobleman; therefore, the law protects me) with freedom from (coercion or influence from those socially stronger). Nevertheless, I believe, the moral and ethical element is introduced in this rather bold statement: virtue, kindness and ... this aspect of noble discourse that still defies description (including mine in this speech). It is often referred to as "honesty." The power of this discourse would be (such a construction could be extracted from this and many other similar statements) moral honesty (in the eighteenth century it was said about "Old Polish honesty" as a feature characterizing "ancestors" often depicted in opposition to the corrupt, mannered present day).

It is probably quite risky to refer to the testimony in this respect, emerging from the statements made years later by an old inventor, quite well known for his highly dubious moral conduct. Nevertheless, our knowledge

about the rhetorical context of the statement may come to our aid, releasing us from the obligation to examine the compliance of words with facts, but imposing on us the task of examining the compliance of words with the “horizon of social expectations.” Undoubtedly Pasek, the representative of the noble *modus vivendi*, whitening his biography years later constructs his story by fulfilling the task of “social expectations.” After all, his life is supposed to be a story, a science for descendants, potential recipients, so we expect it to be a part of a postulative model. Adam Mickiewicz touches this construct, pointing in the course at College de France to a peculiar characteristic of Polish identity, pointing to its style (Pasek) and moral warp (priest Kordecki). From this perspective, the projection of Jan Chrysostom Pasek gives interesting insight into the desirable features of this discourse, this “honesty” or assertiveness of the noble discourse (as a *sine qua non* condition of freedom of expression): there is truth and narratives about it. The Narrator of *Pamiętniki*—in his self-presentation, of course—stands on the side of the truth, deciding what it certainly was. If I were to add that if the characteristics of Polish narrative are read in opposition to the Italian narrative, the southern narrative from a work from a different period and other functions than the diary of an old adventurer who has to fulfil, i.e. when in this respect the poem of Mikołaj Hussowski is read *Carmen de statura, feritate ac venatione bisontis*, we may have to deal with a similar story: it is like the same, one story of noble entelechy permanently based on the virtue, supporting what is obvious, decisive and clear. An inalienable basis thereof, the basic condition is moral purity.<sup>23</sup>

It is good to see one more testimony in which we would deal with (rhetorical admittedly, and thus inscribed in the persuasive context) description of the crisis. Nevertheless, perhaps it is the crisis situation (and a description thereof used for persuasion) that allows the extraction of additional meanings of this relationship between freedom (including expression) and the issue of virtue or civic honor—and both leading to the most important components of noble civic reasoning—to morals (*mores*). Reflection on their relationship with the law, political institutions (i.e. freedoms) is one of the most interesting aspects of Old Polish thought. Let’s remind: customs not only protect freedom, but also protect against degeneration thereof. It is similar with the laws, which without morals are just empty words. Manners contribute to the practice of virtue (which, after all, they

---

23 Cf. K. Koehler, *Carmen de statura, feritate ac venatione bisontis, Mikołaja Hussowczyka*, in: *Historia literatury polskiej w dziesięciu tomach*, Vol. 2, *Renesans*, Bochnia 2004, pp. 192-197. In the context of these considerations, one should especially indicate the inspiring book by H.-J. Bomelburg, *Polska myśl historyczna a humanistyczna historia narodowa (1500-1700)*, transl. Z. Owczarek, Kraków 2011, *passim*.

are an expression). It is the customs rather than well-written laws that protects against the transformation of *libertatis* into *licentiae*.

If I were to look for the testimony that most fully shows this relationship, I would point to this place in the dissertation of Stanisław Orzechowski in one of his two anti-barbaric speeches, where we deal with the description of the situation of “civic” communication—with each other and with the outside—corrupted by irresponsible behavior of the monarch. Speech has the character of lampoon, its function is strictly persuasive, nevertheless, the presented “reasoning” refers to a certain intellectual “trap” probably recognizable to the audience.

In short (I refer here to my analysis from the book about Orzechowski<sup>24</sup>), the process looks like this: the king committed the offence; this deed affects the freedom of expression of subjects, obstructing the vigor and energy proper to public discourse in Poland, resulting from virtue and a clear understanding of reality, which is not disturbed by transgression. Why is this happening? Because the royal deed brought shame on his people. It is particularly visible in relationships with others. According to Orzechowski, Polish discourse is based on a sense of dignity and practicing virtue: awareness of the violation, therefore, is the fundamental basis for the well-being of a citizen of the Republic of Poland. I pointed out in the considered book that the argument so arranged (in accusatory speech) means that it can be assumed that the writer: “bases the public discourse of the Republic of Poland on freedom of speech and thought, and the sine qua non of this freedom does not make the law ... but a sense of citizens’ dignity resulting from the practice of virtue.”<sup>25</sup>

We read:

Quo quid iam gravius accidere potest nobis Polonis, qui et natura excellenti moti et domestica laude excitati magnanimi semper et liberii fuimus et totum orbem terrarum nobis patentem et liberum, oculos etiam, vocis et mentes ubique liberas habuimus, neque dici neque cogitari potest, equites. Amissa enim laude et dignitate eaque libertate, quid est reliquum, quod non amiserimus?<sup>26</sup>

Energy or the basic strength of the Polish narrative (its openness), according to the writer, including dignity, glory and freedom, when this openness must suppress the need to hide an unworthy act (veiling)—dies, dries, turns into its opposite, into a caricature. Among others, Łukasz Górnicki

---

24 K. Koehler, *Stanisław Orzechowski*, op. cit., pp. 195-215.

25 *Ibidem*, p. 205.

26 *Ibidem*.

noticed this feature of Polish narrative in *Rozmowa Polaka z Włochem* from the end of the 16th century, and although he rather took the position of the Italian in the dispute, he also noticed the fact that in “Poland” “freedom is noble” and not based on “law and the rule of law.”<sup>27</sup> Which, of course, can be understood pejoratively, but also that the moral (therefore existential) aspect is more important than law.

Which in other words means that so desired freedom in Poland, is based on civic virtue. This was also expressed sometimes as “Poland is not governed by the government, but by the freedoms of citizens.”

From among these freedoms, as I tried to show above, the “freedom of expression” was not the last one, which—as Karpiński says—brought such words as “bold.”

#### BIBLIOGRAPHY

- Barycz H., *Szkice z dziejów Uniwersytetu Jagiellońskiego*, Kraków 1933.
- Bomelburg H.J., *Polska myśl historyczna a humanistyczna historia narodowa (1500-1700)*, transl. Z. Owczarek, Kraków 2011.
- Chmielowski B., *Nowe Ateny...*, Vol. II, ed. from 1746.
- Correspondence of F. Karpiński dated 1763-1825*. Collected by T. Mikulski, ed. R. Sobol, Wrocław 1958.
- Czubek J., *Wespazyan z Kochowa Kochowski*, Kraków 1909.
- Eustachiewicz M., Majewski W., *Nad lirykami Wespazjana Kochowskiego*, Wrocław 1986.
- Grześkowiak-Krwawicz A., *Dyskurs polityczny Rzeczypospolitej Obojga Narodów. Pojęcia i idee*, Toruń 2018.
- Karpiński F., *Dziela*, Warszawa 1830.
- Koehler K., *Carmen de statura, feritate ac venatione bisonis, Mikołaja Hussowczyka*, in: *Historia literatury polskiej w dziesięciu tomach*, Vol. 2, *Renesans*, Bochnia 2004.
- Koehler K., *Domek szlachecki w literaturze polskiej epoki klasycznej*, Kraków 2005.
- Koehler K., *Rzeczpospolita, obywatelskość, wolność. Szkice o polskim piarstwie politycznym XVI wieku*, Warszawa 2016.
- Koehler K., *Stanisław Orzechowski i dylematy humanizmu renesansowego*, Kraków 2004.

---

27 Cf. D. Pietrzyk-Reeves, introduction, Ł. Górnicki, *Droga do zupełnej wolności, Rozmowa o elekcji, wolności, prawie i obyczajach polskich*, Kraków 2011; K. Koehler, *Łukasz Górnicki a wolność*, in: *Rzeczpospolita, obywatelskość, wolność. Szkice o polskim piarstwie politycznym XVI wieku*, Warszawa 2016, pp. 285-307.

- Krótkie rzeczy potrzebnych z strony wolności a swobód polskich zebranie przez tego, który wszego dobrego życzy ojczyźnie swojej*, in: *Krzysztofa Warszewickiego i Anonima uwagi o wolności szlacheckiej*, ed. K. Koehler, Kraków 2010.
- Krzywy R., *Sztuka wyborów i dar inwencji. Studium o strukturze gatunkowej poematów Jana Kochanowskiego*, Warszawa 2008.
- Mickiewicz A., *Wykłady paryskie*, rok 2, lekcja 3.
- Opaliński E., *Kultura polityczna szlachty polskiej w latach 1587-1652*, Warszawa 1995.
- Pasek J.Ch., *Pamiętniki*, <https://wolnelektury.pl/media/book/pdf/pamietniki.pdf>.
- Pietrzyk-Reeves D., *Droga do zupełnej wolności, Rozmowa o elekcji, wolności, prawie i obyczajach polskich*, introduction by Ł. Górnicki, Kraków 2011.
- Pietrzyk-Reeves D., *Ład Rzeczypospolitej: polska myśl polityczna XVI wieku a klasyczna tradycja republikańska*, Kraków 2012.
- Sobol R., *Franciszek Karpiński*, Warszawa 1979.
- Tazbir J., *Państwo bez stosów. Szkice z dziejów tolerancji w Polsce w XVI-XVII w.*, Warszawa 1967.
- Weintraub W., *Muza i mamona*, in: *Nowe studia o Janie Kochanowskim*, posłowie T. Ulewicz, Kraków 1991.



**Krzysztof Koehler**—Professor at the Cardinal Stefan Wyszyński University. Specialization: editor, historian of old Polish literature, researcher of rhetoric. Recent works: *Palus Sarmatica*, ed. NCK i Sic!, Warszawa 2016; *Rzeczpospolita, obywatelskość, wolność. Szkice o polskim piarstwie politycznym XVI wieku*, Warszawa 2016. Lives in Krakow.





**Danuta Smołucha**  
ORCID: 0000-0002-9610-997X  
Jesuit University Ignatianum in Krakow  
danutasmolucha@wp.pl  
DOI: 10.35765/pk.2019.2704.12

## Eye-tracking in Cultural Studies

### ABSTRACT

Eye-tracking is a technology based on tracking the movement of eye-balls. The results of the study allow a detailed analysis of the path of sight, and provide answers to the questions: what are we looking at, what we focus on and what we ignore despite that the objects are located in our field of view. The eye movement tracking is not a new technology, but it is constantly improved and is gaining importance in many fields of science and consumer market research. Contemporary culture, oriented to image absorption, is a perfect surface for non-standard eye-tracking research.

**KEY WORDS:** eye-tracking, saccade, fixation, the gaze plot

### STRESZCZENIE

#### *Eye-tracking w badaniach kulturowych*

Eye-tracking to technologia, której działanie polega na śledzeniu ruchu gałek ocznych. Wyniki badania pozwalają na szczegółową analizę ścieżki wzroku, udzielając odpowiedzi na pytania, na co patrzymy, na czym skupiamy największą uwagę, a co ignorujemy i czego nie dostrzegamy, pomimo tego, że znajduje się w polu widzenia. Śledzenie ruchu gałek ocznych nie jest technologią nową, jednak stale udoskonalane, zyskuje coraz większe znaczenie w życiu codziennym, wielu dziedzinach nauki i w badaniach rynku konsumenckiego. Współczesna kultura, zorientowana na absorbcję obrazów, jest szczególnie doskonałą płaszczyzną, na której badania eye-trackingowe znajdują wiele często niestandardowych zastosowań.

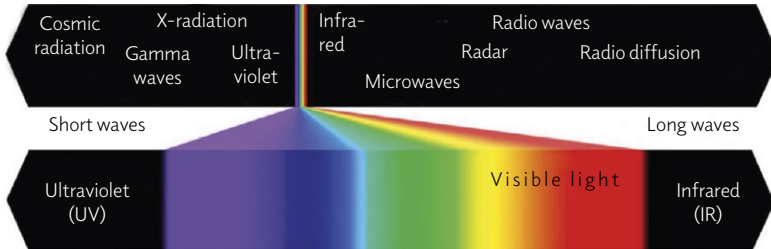
**SŁOWA KLUCZE:** eye-tracking, sakkady, fiksacje, ścieżka wzroku

## The new culture of vision

It would be difficult to argue with the thesis that modern culture is largely based on the absorption of images. Visual communication reigns in the world of new technologies and social networks. Image is a fast message, which influences the imagination to a greater extent than the written text and at the same time—stronger and more memorable. Nowadays, nobody has time for long, extensive narratives. A message should be short and quick in receipt. Image fits perfectly in this style.

Man receives most external stimuli through the organ of vision. However, although a human eye is a perfect and extremely precise organ, its capabilities are limited. From the wide electromagnetic spectrum, only a narrow band thereof is perceived by the human sense of sight. However, image perception and interpretation are not a simple process at all. It is so because not all images are absorbed in the same way. Moreover, recording images by the sense of sight depends not only on their qualitative features, but also on their location in space or on the monitor screen.

Figure 1. Spectrum of electromagnetic radiation



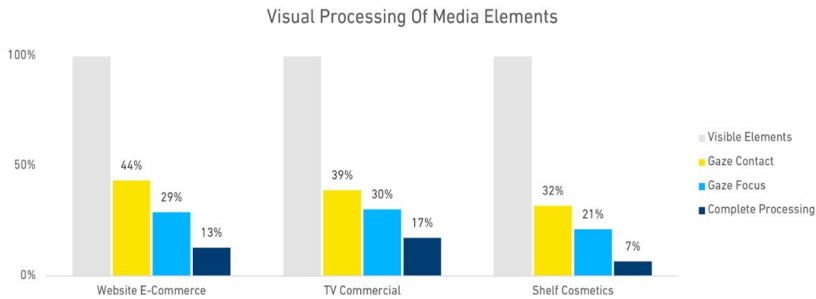
Source: P. Francuz, *IMAGIA. W kierunku neurokognitywnej teorii obrazu*, <http://new.after-imagia.pl/widzenie/>

The visual sphere of the modern world is so developed and diverse that it is not possible for all stimuli to be recorded and processed by man with equal intensity. As part of the activities of the *Eye Square* international market research institute, a series of studies have been conducted which have conclusively confirmed this fact. Tests carried out on groups of respondents from several countries have shown that they focus on less than one third of the visible elements of advertisements presented on television, on e-commerce websites and also when viewing product displays on store shelves (Fig. 2).<sup>1</sup>

1 A detailed description of the study is available on the website <https://www.eye-square.com/eye-tracking/> (access: 17.12.2018).

At a time when the human attention is focused on a selected visual point, their abilities to perceive further placed elements are very limited. The further away from the focus point, the less detail is recorded by the human brain.

**Figure 2.** Percentage graph of the absorption of elements on online store websites, on TV and on store shelves by eye-tracking survey participants



Source: <https://www.eye-square.com/eye-tracking>

However, this selective and very limited perception of the surrounding world is not the result of the human body's disability, but on the contrary, it happens for the good of man. By registering only a part of the elements from the visual sphere within sight, the human brain defends itself against an excess of stimuli which it would not be able to interpret in real time.

It is worth having knowledge about what human registers in the process of perceiving reality, what elements draw their attention and which are omitted. The ability to trace the path of vision and subsequent focal points of visual attention allows for a deeper understanding of human behavior in everyday situations, when performing various types of tasks and also when making communication interactions.<sup>2</sup>

## Eye-tracking as a method of examining visual attention

On average, a human eye makes three to four movements per second. At this time, visual attention moves between the elements of the visual sphere surrounding the human being, and this is happening largely beyond

2 B.W. Tatler, C. Kirtley, R.G. Macdonald, K.M. Mitchell, S.W. Savage, *The Active Eye: Perspectives on Eye Movement Research*, in: *Current Trends in Eye-tracking Research*, eds. M. Horsley, M. Eliot, B.A. Knight, R. Reilly, Sydney 2014, pp. 3-9.

human consciousness. The path of visual attention can be traced using the so-called fixations and saccades. Fixation is a temporary stopping of the eyesight during visual activity of human. Very fast movement of the eyeballs, corresponding to the transfer of visual attention from one fixation to another is referred to as a saccade. The analysis of subsequent fixations and saccades explains many phenomena related to image perception and visual information assimilation.

Eye-tracking is a research method that allows to collect precise data describing the process of perceiving objects within the range of human sight. It is used to monitor eye movements and record focus points for analysis and interpretation. Eye-tracking allows to track changes in the focus of visual attention over time, based on the analysis of the path of vision, obtaining information about the perception patterns of visual stimuli.<sup>3</sup> This research enables access to various aspects related to cognitive processes and human behavior.

Eye-tracking research methods are constantly evolving and improving, but the techniques associated with eye path testing are not new. The first research based on eye movement tracking took place as early as the beginning of the 19th century. Back then, they were based on direct observation of eye movement of the participants. Therefore, they were not very accurate, which further limited the area of their application. The breakthrough came when the French ophthalmologist Louis Émil Javal discovered in 1879 that reading is not continuous, but the visual attention between words is shifted in steps. He was also the first to conduct empirical studies of eye movement and for the purposes of describing the results of the research he defined the concept of saccade. In subsequent years, the technology used to track the path of vision was successively improved, and in the mid-twentieth century the first mobile device for recording eye movements was designed.<sup>4</sup>

Since then, the area of application of the eye-tracking method has been successively expanded, and with the development of technology, the measuring precision of the testing equipment has increased, while the cost of production has decreased. Currently, the main areas of application of eye-tracking methods include cognitive psychology, medicine, marketing research and cultural research. Eye-tracking also plays an increasingly important role in the broadly understood interaction between human and computer. In this context, it is worth mentioning even the advanced work

3 A. Schall, J.R. Bergstrom, *Introduction to Eye-tracking*, in: *Eye-tracking in User Experience Design*, eds. J.R. Bergstrom, A.J. Schall, Waltham 2014, p. 3.

4 T. Opach, *Zastosowanie okulografii (techniki eye-tracking) w kartografii*, "Polski Przegląd Kartograficzny," 43, 2, 2011, p. 157. See also N. Wade, B. Tatler, *The Moving Tablet of the Eye. The Origins of Modern Eye Movement Research*, Oxford 2005, pp. 20-21.

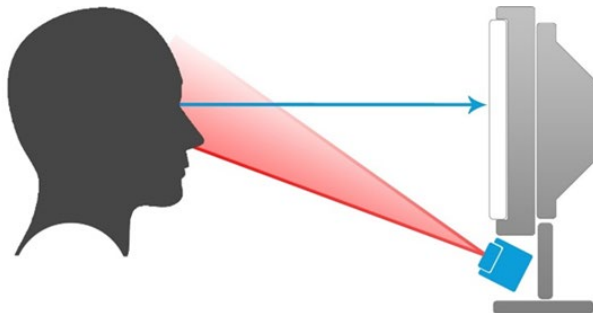
on the design of visual interfaces, where mouse control is replaced by eye movement. Eye-tracking can also be used e.g. in computer games as an alternative data input method.

Nowadays, eye-tracking offers new methods of data collection and analysis. Scientists keep extending their knowledge about the functioning of the human sense of sight in the context of focusing attention and recognizing reality. The ability to track eyesight and record the results of such tests with high accuracy has allowed asking new questions and raising scientific hypotheses, which can be verified using eye-tracking technology.<sup>5</sup> Researchers also see the practical application of eye-tracking technologies in cultural research.

Researchers choose the type of eye tracker, a device that monitors eye movement, according to the type of task to be carried out by its participants. Stationary eye trackers are devices used to examine attention with which the user views images on screens, working with multimedia such as images, films, computer games and when browsing websites. An eye tracker equipped with appropriate sensors, which is most often integrated with the monitor, scans the eyes of the examined person on average 50 times per second, recording areas at which the person's eyes are directed at a given moment (Fig. 3).

Mobile eye trackers allow free movement of the person. They allow visual attention tests to be carried out in a natural environment. This type of tests involves the analysis of behavior in stores, cultural institutions, in a car or in the urban space, for example when testing billboard ads.

**Figure 3.** Operating diagram of stationary screen eye-tracking technology



Source: <http://www.makinggames.biz/feature/use-your-eyes-interaction-through-eye-tracking,7117.html>

---

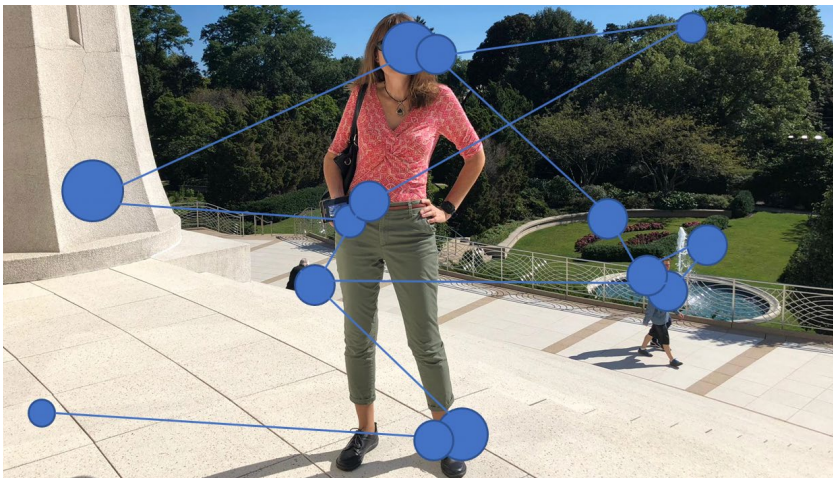
5 M. Horsley, *Introduction*, in: *Current Trends in Eye-tracking Research*, eds. M. Horsley, M. Eliot, B. A. Knight, R. Reilly, New York 2014, p. v.

## Presentation of eye-tracking test results

The data collected during eye-tracking research, before being subjected to analysis, are visualized, i.e. presented in a graphic, convenient to interpret form. Information visualization is a powerful tool for presenting data and information in order to learn and/or analyze them. Especially in recent decades, when scientific research is based on a huge amount of data, visualization has become almost a commonly used method in the world of science. Graphic presentation of data ensures transparency of the message and facilitates the understanding thereof. Weather forecasts, exchange rates, support for political parties are just a few examples of information we have already got used to being presented to us in a visualized form.<sup>6</sup>

One of the most common ways to present the results obtained through eye-tracking tests is gaze plot. It is presented as a series of consecutive fixations graphically marked as circles, the size of which is related to their duration (the longer the focus, the larger the circle) and saccades, sections connecting subsequent fixations (Fig. 4).

**Figure 4.** Simulation of recording the gaze plot by means of marking fixations as circles of varying sizes depending on the length of time the visual attention is focused and the saccades, as the sections between the circles representing subsequent fixations



Source: own study.

6 B. Fua, N.F. Noyb, M. Storeya, *Eye-tracking the User Experience—An Evaluation of Ontology Visualization Techniques*, <http://www.semantic-web-journal.net/system/files/swj770.pdf> (access: 17.12.2018).

This kind of visualization presents information about the areas where the person focused their sight, however, for more detailed analysis and interpretation, an additional parameter is often introduced, specifying the order of fixation. Owing to this kind of presentation, researchers can trace not only what and how long the subject looked at, but also what interested the test participant's attention in the first place and they looked at later on.

An alternative way of presenting eye-tracking research results is the so-called heatmap, which is graphics indicating the areas on which the test participants have focused their attention on.<sup>7</sup> Warm colors, from red through yellow to green, represent those areas that attracted more attention of the respondents. Greater precision in the analysis of areas perceived by respondents is obtained by including additional parameters, such as the time elapsed to the first fixation, the number of respondents and the average time spent on viewing particular focus areas, the number of repeated visits for a given area (Fig. 5).<sup>8</sup>

Figure 5. Heat map of urban space research results using a mobile eye tracker



Source: <http://neuorelay.com/2016/09/11/eye-tracking-in-neuromarketing-research/>

## Eye-tracking as a method of examining websites

In the information society, most diverse tasks are performed using a computer. Therefore, the usability of operating systems, user interfaces, applications and websites has recently been undertaken. Usability is a measure

7 The choice of eye-tracking test method and presentation method results are largely related to the number of users participating in the test. The presentation of results using a heat map is used for quantitative research, based on statistics. Therefore, at least 30 participants should participate in the test. K. Pernice, J. Nielsen, *How to Conduct Eye-tracking Studies*, Freeman, 2013, 1, p. 19, [https://media.nngroup.com/media/reports/free/How\\_to\\_Conduct\\_Eye-tracking\\_Studies.pdf](https://media.nngroup.com/media/reports/free/How_to_Conduct_Eye-tracking_Studies.pdf) (access: 17.12.2018).

8 *Eye-tracking in User Experience Design*, op. cit., Waltham 2014, p. 5. See also A. Duchowski, *Eye-tracking Methodology. Theory and Practice*, London 2007, pp. 15-16, 42.

of effectiveness, efficiency and satisfaction obtained when using a product in order to achieve the expected benefits in a given context of its use. In short, a product is useful if the handling thereof is not difficult and the use is intuitive.<sup>9</sup> Therefore, usability tests apply to goods used on a daily basis, all types of devices that require a specific method of operation, as well as websites that are an important source of information for the contemporary man. The results of eye-tracking tests give an idea of the patterns of receiving messages posted on websites.

An Internet user who, within the first ten seconds of browsing a website, does not find the information they were looking for, leaves it and proceeds to the next site. However, not finding the information that interests them does not necessarily mean that it is not available on the site. The reason may be the arrangement thereof in a place that is beyond the user's attention. In such cases, testing the websites prior to the publishing on the web proves to be invaluable help during tests.

One example of an unfortunate website design is the home page of a well-known international clothing brand published in 2012. Due to the start of the Summer Olympic Games, *Ralph Lauren's* home page has temporarily changed its appearance. In the central part there is a photo taken during the opening ceremony of the games, and in the lower part of the photo there was an inscription saying that all the clothes in which the athletes appeared at the ceremony were created by Ralph Lauren's designers (Fig. 6).

Eye-tracking tests have shown, however, that only one of all respondents got acquainted with this information. Other test participants focused their attention on the silhouettes of athletes, kept their eyes on the flag and logo of the Olympics, but ignored the statement below the photo. As one can guess, the main purpose of the inauguration of the temporary page was to convey the message, which was overlooked by website visitors due to the unfortunate placement thereof.<sup>10</sup>

The acquisition of information on websites is governed by its own laws. Frequent use of electronic publications has modified reading habits. This is not a linear and continuous reading, as is the case with printed texts, but a scan of text elements and images placed on the electronic display. Tests conducted in 2013 revealed that people of different cultural backgrounds differ in terms of style with the content on the search results pages. Groups of respondents from the Middle East and Western Europe took part in eye tracker tests. It turned out that the respondents from the first group spent more time familiarizing themselves with the content of the search results,

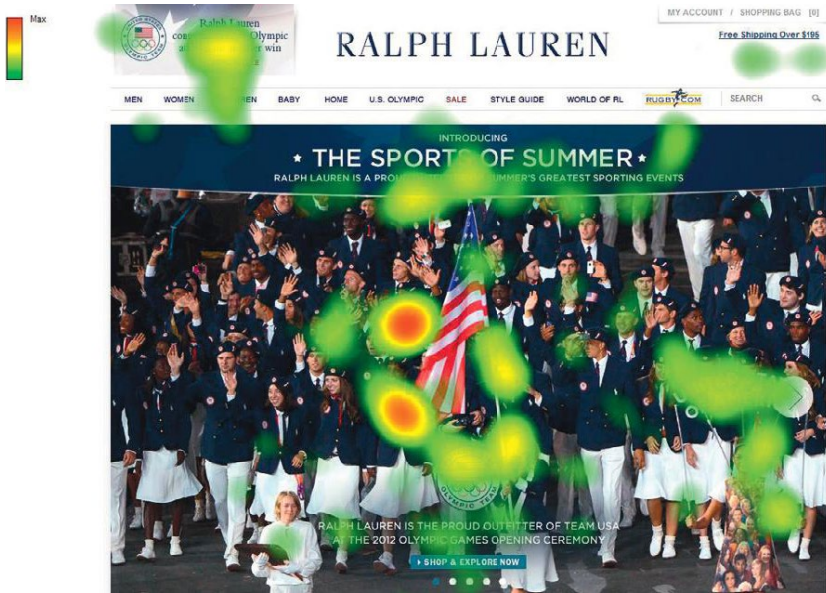
9 J. Andrzejewski, *Projektowanie użytecznych produktów*, Warszawa 2009, p. 4.

10 A.J. Schall, J.R. Bergstrom, *Introduction to Eye-tracking*, op. cit., p. 23.



while the participants of the second group paid less attention thereto, rather scanning the displayed content, instead of analyzing it longer.<sup>11</sup>

Figure 6. The results of the eye-tracking test of the Ralph Lauren website—heat map



Source: A.J. Schall, J.R. Bergstrom, *Introduction to Eye-tracking*, in: J.R. Bergstrom, A.J. Schall, *Eye-tracking in User Experience Design*, Waltham 2014, p. 23.

## Eye-tracking in marketing

Colorful advertisements, ubiquitous in urban space and on websites, fight for the attention of the recipient. Those that fail to attract the attention within the first few seconds will be ignored by them. An image, in order to be registered and remembered, and at the same time to evoke positive associations, should “catch the eye,” and although this is only a colloquial term, it perfectly describes the way the human perceives the world.

In recent years, cheap, commercial eye trackers have been developed, which accurately track and record the movement of human eyes. In this, as well as in the growing commercialization of culture, one should see the

11 M.C. Marcos, R. Garcia-Gavilanes, E. Bataineh, L. Pasarin, *Using Eye-tracking to Identify Cultural Differences in Information Seeking Behavior*, <http://www.ruthygarcia.com/papers/chi2013.pdf> (access: 17.12.2018).

reason that the method of eye-tracking is more and more often used in marketing, where it allows the study of consumer perception and response to advertising messages.<sup>12</sup> This is particularly important due to the fact that almost 90% of stimuli reach consumers through the sense of sight.<sup>13</sup> Market researchers agree that marketing is not a competition for products, but for perception, therefore it is one of the areas where it is particularly important to know what people are looking at and what they bypass, which catches their attention and what they ignore.<sup>14</sup>

It is obvious that an effective advertising message that meets the intended goals of the advertiser should attract the attention of consumers mainly on those elements that relate to the brand name and features of the advertised product or service. In addition, the recipient should read and interpret the message as intended by the sender.

Figure 7. The results of an eye-tracking test of a website with an advertising banner in its central part



Source: <https://www.tobiipro.com/fields-of-use/marketing-consumer-research/advertising/>

The internet is a great advertising space. Advertising messages on websites have become almost an indispensable element thereof long ago. However, once popular advertising banners are becoming less and less effective, because modern man has learned to defend against their intrusive

12 N. Scott, Ch. Green, S. Fairley, *Investigation of the use of eye-tracking to examine tourism advertising effectiveness*, "Current Issues in Tourism," 197, 2016, pp. 634-642.

13 E. Jerzyk, *Zastosowanie okulografii w badaniach uwagi wzrokowej konsumentów*, "Handel Wewnętrzny," 2, 371, 2017, p. 124.

14 A. Ries, J. Trout, *22 niezmiennie prawa marketingu*, Warszawa 1996, p. 33.

influence. Web users, in order to avoid the flood of useless content, have become resistant to the promotion of unnecessary products and services. When browsing the websites, they omit the advertising banners, focusing only on the page elements that interest them. This mechanism was called banner blindness.

Banner blindness is therefore a developed phenomenon, allowing the Internet user to save time that would be spent on learning content that is not of interest to them. Sometimes, however, as a result of the mechanism, which aims to protect against unnecessary information, the user of the page ignores content that could be relevant and valuable to them. This happens when they have been designed in the form, color and sizes usually used for advertising (Fig. 7).

## Cultural conditioning of image registration patterns

Scientists have been involved in the dependence of image perception patterns on cultural considerations for a long time, but it was only the development of eye-tracking technology that made it possible to conduct more serious research in this area. In 2015, researchers from the University of Arizona conducted an experiment that aimed to determine whether and to what extent visual attention patterns differ between Americans and those test participants who were born in China and raised in this country. It turned out that Asians pay attention to the context in which the message is placed, while people from Western culture focus more on objects that are the main element of the message.<sup>15</sup>

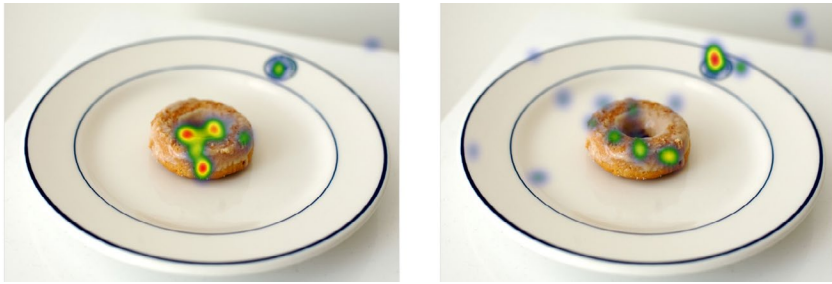
Eye-tracking allowed verification of many stereotypes that were formulated solely on the basis of observation. The opinion that men looking at the face focus mainly on the lips, while women focus their attention on the eyes has always been common. Eye-tracking of the test participants confirmed this, as well as the thesis that attention is most focused on the face when observing the human figure. In the same research, differences in perception patterns of the human figure were also indicated, resulting not only from the difference in sex, but also from cultural conditions. For example, when viewing photos of a young, attractive woman, the French women focused their attention on her neckline more than twice as

---

15 B. Zhang, H.S. Seo, *Visual attention toward food-item images can vary as a function of background saliency and culture. An eye-tracking study*, "Food Quality and Preference," 41, 2015, pp. 172-179. For similar surveys see J.O. Goh, J.C. Tan, D.C. Park, *Culture Modulates Eye-Movements to Visual Novelty, Culture Modulates Eye-Movements to Visual Novelty*, "PLOS ONE," 4, 12, 2009, <https://journals.plos.org/plosone/article/file?id=10.1371/journal.pone.0008238&type=printable>

intensely as ladies from Great Britain, while the proportion of focus on the ring on the hand of the photographed woman was exactly the opposite.<sup>16</sup>

**Figure 8.** Eye-tracking test results of visual attention patterns on a group of US and Chinese respondents—heat map



Source: B. Zhang, H.S. Seo, *Visual attention toward food-item images can vary as a function of background saliency and culture. An eye-tracking study*, “Food Quality and Preference,” 41, 2015, p. 177.

Eye-tracking is a useful tool in researching ways of learning. People differ in preferences and, as a consequence, also in the way they process and remember information, they use different patterns of reading texts and assimilating the images they contain. It would be difficult to find a better methodology for researching cognitive preferences than tracking and analyzing the eyesight of test participants. The tests confirmed the theory dividing people into two groups: those whose visual cognitive style is characterized and those whose cognitive process is based on verbal communication.<sup>17</sup>

Eye-tracking method has also found widespread use in computer games in recent years, where it is used in two different ways. The first one is to evaluate the game design, assess the functionality and usability of the solutions used. In the second case, more interesting from the point of view of the game, the gaze is used as data input technique.

16 More about research results <http://miratech.com/> (access: 17.12.2018). The study was conducted in 2011 by the French consulting company *Miratech* in cooperation with partners from four European countries as well as from Brazil and the USA. Description of research related to the perception of the face and its elements, see also S. Seyda, J. Wiśniewska, *Czy twarz naprawdę postrzegana jest jako całość?*, “Lingwistyka Stosowana,” 20, 5, 2016, pp. 119-125.

17 M. Koć-Januchta, T. Hoffler, G. Thoma, H. Precht, D. Leutner, *Visualizers versus verbalizers: Effects of cognitive style on learning with texts and pictures—an eye-tracking study*, “Computers in Human Behavior,” 68, 2017, pp. 170-179. See also D. Leutner, T. Hoffler, M. Koć-Januchta, *More Evidence for Three Types of Cognitive Style. Validating the Object-Spatial Imagery and Verbal Questionnaire Using Eye-tracking when Learning with Texts and Pictures*, “Applied Cognitive Psychology,” 31, 2017, pp. 109-115.

After the joystick and computer mouse, it is time to control the elements of a game with eyesight. Although this is not a common practice used to control a game, many games have gained new quality owing to the use of eye-tracking technology. In such games as *Flight Simulator X* or *Deus Ex: Mankind Divided* focusing the player's gaze on the edge of the image causes it to shift, which smoothly widens the perspective, creating the so-called *Infinite Screen Extension*. In games where the player's tasks are mainly to target and eliminate opponents, eye-tracking allows to choose a target with own eyes. Almost as fast as the human eye moves, the player can move between successive elements of the game or between the opponents they want to eliminate.

In some kinds of games in which the dark mood of horror prevails, compounded by the darkness that envelops the action scene, the areas to which the player directs attention at a given moment are recognized and only highlighted. In this way, the effect of using a flashlight is obtained, which builds the realism of the game allowing to get deeper into the course thereof.<sup>18</sup> Eye-tracking technology allows people with disabilities to use games, although it does not completely replace input devices such as a mouse or joystick.

## Conclusion

A popular saying is that the eyes are the mirror of the soul. Although this is only a beautiful metaphor, it would also be difficult to disagree with the fact that gaze is one of the most important non-verbal signals in interpersonal communication. Eye-tracking studies help to explain patterns of human behavior in face-to-face contacts, especially differences in the behavior of people from different cultural backgrounds.

The real strength of eye-tracking technology can be seen in its combination with techniques of visualizing human nervous system activity and analyzing the current biometric data. The results of comprehensive research include measurement of brain activity, heart rate and breathing, muscle response at the time of perception of particular image components. Comparing these data with the results of facial expression analysis not only provides information on what the participant looks at, but also what emotions are present in this process.<sup>19</sup>

---

18 Examples of games using eye-tracking technology e.g. <https://www.spidersweb.pl/2016/08/eye-tracking-acer.html>; <http://www.makinggames.biz/feature/use-your-eyes-interaction-through-eye-tracking,7117.html> (access: 17.12.2018).

19 J.R. Bergstrom, S. Duda, D. Hawkins, M. McGill, *Physiological Response Measurements*, in: *Eye-tracking in User Experience Design*, eds. J. R. Bergstrom, A.J. Schall, Waltham 2014, pp. 93-95 i n.

Eye-tracking method in combination with the analysis of biometric parameters is presently a powerful research tool enabling the undertaking of various tests, including those for which the earlier scientific apparatus was lacking.<sup>20</sup>

## BIBLIOGRAPHY

- Andrzejewski J., *Projektowanie użytecznych produktów*, Warszawa 2009.
- Bergstrom J.R., Duda S., Hawkins D., McGill M., *Physiological Response Measurements*, in: *Eye-tracking in User Experience Design*, eds. J.R. Bergstrom, A.J. Schall, Waltham 2014, pp. 93-95 i n.
- Duchowski A., *Eye-tracking Methodology. Theory and Practice*, London 2007.
- Eye-tracking in User Experience Design*, eds. J.R. Bergstrom, A.J. Schall, Waltham 2014.
- Francuz P., *IMAGIA. W kierunku neurokognitywnej teorii obrazu*, <http://new.afterimagia.pl/widzenie>
- Fua B., Noyb N.F., Storeya M.-A., *Eye-tracking the User Experience—An Evaluation of Ontology Visualization Techniques*, <http://www.semantic-web-journal.net/system/files/swj770.pdf>
- Goh J.O., Tan J.C., Park D.C., *Culture Modulates Eye-Movements to Visual Novelty*, *Culture Modulates Eye-Movements to Visual Novelty*, "PLOS ONE," 4, 12, 2009, <https://journals.plos.org/plosone/article/file?id=10.1371/journal.pone.0008238&type=printable>
- Gundgaard B., *Banner blindness kills your banners*, <https://www.benjamin-gundgaard.com/banner-blindness-kills-your-banners>
- Horsley M., *Introduction*, in: *Current Trends in Eye-tracking Research*, eds. M. Horsley, M. Eliot, B.A. Knight, R. Reilly, New York 2014.
- Jerzyk E., *Zastosowanie okulografii w badaniach uwagi wzrokowej konsumentów*, "Handel Wewnętrzny," 2, 371, 2017.
- Kasneci E., Kübler T., Broelemann K., Kasneci G., *Aggregating physiological and eye-tracking signals to predict perception in the absence of ground truth*, "Computers in Human Behavior," 68, 2017.
- Koć-Januchta M., Hoffler T., Thoma G.-B., Prechtl H. i Leutner D., *Visualizers versus verbalizers: Effects of cognitive style on learning with texts and pictures—an eye-tracking study*, "Computers in Human Behavior," 68, 2017.

20 For example, in 2017, a group of researchers used the eye-tracking method extended by testing biometric parameters to assess a driver's visual perception and ability to recognize threat situations. Tests using eye-tracking have been integrated with the study of the driver's physiological responses, such as the galvanic skin reaction to an object appearing within their sight, accelerated heart rate or EEG recording. See more on: E. Kasneci, T. Kübler, K. Broelemann, G. Kasneci, *Aggregating physiological and eye-tracking signals to predict perception in the absence of ground truth*, "Computers in Human Behavior," 68, 2017, pp. 450-455.

- Leutner D., Hoffer T., Koć-Januchta M., *More Evidence for Three Types of Cognitive Style. Validating the Object-Spatial Imagery and Verbal Questionnaire Using Eye-tracking when Learning with Texts and Pictures*, "Applied Cognitive Psychology," 31, 2017.
- Marcos M.-C., Garcia-Gavilanes R., Bataineh E., Pasarin L., *Using Eye-tracking to Identify Cultural Differences in Information Seeking Behavior*, <http://www.ruthygarcia.com/papers/chi2013.pdf>
- Opach T., *Zastosowanie okulografii (techniki eye-tracking) w kartografii*, "Polski Przegląd Kartograficzny," 43, 2, 2011.
- Pater-Ejgierd N., *Kultura wizualna a edukacja*, Poznań 2010.
- Pernice K., Nielsen J., *How to Conduct Eye-tracking Studies*, Freemant 2013.
- Ries A., Trout J., *22 niezmiennie prawa marketingu*, Warszawa 1996.
- Rzemieniak M., *Badania marketingowe w podejmowaniu decyzji menedżerskich*, Lublin 2012.
- Schall A., Bergstrom J.R., *Introduction to Eye-tracking*, in: *Eye-tracking in User Experience Design*, eds. J.R. Bergstrom, A.J. Schall, Waltham 2014.
- Scott N., Green Ch., Fairley S., *Investigation of the use of eye-tracking to examine tourism advertising effectiveness*, "Current Issues in Tourism," 19, 7, 2016, pp. 634-642.
- Seyda S., Wiśniewska J., *Czy twarz naprawdę postrzegana jest jako całość?*, "Lingwistyka Stosowana," 20, 5, 2016.
- Shoval N., Ahas R., *The use of tracking technologies in tourism research: the first decade*, "Tourism Geographies," 2016, <https://www.tandfonline.com/doi/full/10.1080/14616688.2016.1214977>.
- Tatler B.W., Kirtley C., Macdonald R.G., Mitchell K.M., Savage S.W., *The Active Eye: Perspectives on Eye Movement Research*, in: *Current Trends in Eye-tracking Research*, eds. M. Horsley, M. Eliot, B.A. Knight, R. Reilly, Sydney 2014.
- Wade N., Tatler B., *The Moving Tablet of the Eye. The Origins of Modern Eye Movement Research*, Oxford, 2005.
- Zhang B., Seo H.-S., *Visual attention toward food-item images can vary as a function of background saliency and culture. An eye-tracking study*, "Food Quality and Preference," 41, 2015.



**Danuta Smółucha**—lecturer at the Institute of Cultural Studies at the Jesuit University Ignatianum in Krakow. Author of articles on the role of new technologies in contemporary culture, author and co-author of tourist guidebooks. Her interests include the interdependencies of the digital media with culture and religion. She is also interested in issues related to the digital humanities, in particular with methods of obtaining, visualizing and analyzing data in the humanities.





**Małgorzata Rygielska**

ORCID: 0000-0002-7723-7677

University of Silesia in Katowice

malgorzata.rygielska@us.edu.pl

DOI: 10.35765/pk.2019.2704.13

## *Dono del sangue.*

# The Research by Fabio Dei on the Cultural Conditions of Blood Donation in Italy

### ABSTRACT

The article discusses the course and the results of research on blood donation conducted between 2006 and 2007 in Italy among immigrant communities (Romanian and Senegalese) in Tuscany, conducted by the cultural anthropologist Fabio Dei and his team. The studies reveal that practices related to blood donation are accompanied by a pluralism of mutually incommensurable discourses stemming from a variety of contexts: biomedicine, religious belief, and conceptualizations of health and disease in traditional cultures. Their identification and description may prove to pose a major question in studies on blood donation conducted both in Europe and worldwide.

**KEY WORDS:** blood donation, medicalization, gift in culture, immigrant communities

### STRESZCZENIE

*“Dono del sangue.” O badaniach Fabia Dei nad kulturowymi uwarunkowaniami krwiodawstwa we Włoszech*

W artykule przedstawiam przebieg i omawiam rezultaty badań dotyczących krwiodawstwa we Włoszech, które przeprowadził w latach

2006-2007 we wspólnotach imigranckich (rumuńskich i senegalskich) w Toskanii antropolog kultury Fabio Dei i jego zespół. Dowiodły one, że wielość praktyk związanych z krwiodawstwem towarzyszy pluralizm niewspółmiernych względem siebie dyskursów wywodzących się z różnych kontekstów: biomedycyny, wierzeń religijnych, konceptualizacji zdrowia i choroby w kulturach tradycyjnych. Ich rozpoznanie i opis to obecnie ważny problem w badaniach nad krwiodawstwem w Europie i na świecie.

SŁOWA KLUCZE: krwiodawstwo, medykalizacja, dar w kulturze, wspólnoty imigranckie

Fabio Dei is one of the most famous contemporary Italian cultural anthropologists, actively undertaking the study of such phenomena, which not only require good recognition of cultural reality (including field research), but also deep and broad reflection. He deals not only with the history of anthropology, ethnography and folklore studies, cultural anthropology of literature (in a theoretical approach similar to that proposed by Ewa Kosowska), research into the cultural conditions of violence (including genocide), but also the transformations of popular and mass culture. And while his studies are conducted mainly in Italy, he closely follows the world trends and currents in reflection on culture.

Medical occupies a prominent place in anthropology Fabio Dei's deliberations, but so does the multiplicity of practices included in the sphere of non-conventional medicine sometimes observable today—not only in Italy—and regarded as a sign of the increasingly conscious attempts at demedicalization. He also challenges the concepts offered by the so-called *Critical Medical Anthropology*, not only from the point of view of his practice as a cultural anthropologist, fully conscious of the cultural weight of the determinants of health and disease, but also from the position of a critical historian of sciences referred to in Italian as *scienze demotnoantropologiche*. I consider his discussion as important and inspiring, as they relate very often to a local dimension of phenomena, which are interpreted in relation to the globally understood process of medicalization.<sup>1</sup> In this article, I focus primarily on the presentation of the course and results of Dei

1 Cf. F. Dei, *Cultura popolare in Italia. Da Gramsci all'Unesco*, Bologna 2018 (in particular, the chapter: *Antropologia medica e pluralismo delle cure*, pp. 18-210). Idem, *Medicine non convenzionali: una prospettiva antropologica*, in: *Le parole dell'antropologia medica. Piccolo dizionario*, ed. D. Cozzi, Perugia 2012, pp. 157-180. Idem, *Spettri del biopotere*, in: *Storie di un altro mondo. Percorsi di etnografia delle migrazioni*, eds. F. Bachis, A.M. Pusceddu, Roma 2013, pp. 45-65.

and his team’s research on the cultural determinants of blood donorship in Italy.<sup>2</sup>

Of course, not all the problems mentioned by Dei and the researchers associated with him are present in Poland to the same extent and with the same intensity as in England, France or Italy.<sup>3</sup> This does not mean, however, that reflection on the different ways to manifest for *homo medicus* can be omitted completely. On the contrary, in view of the multitude of medical and paramedical practices and the accompanying heteroglossy of discourses, as well as the growing variety of ways of producing and distributing “medical knowledge,” their recognition and description are becoming an increasingly urgent task for culture researchers.

## AVIS and Italian blood donorship

Italy occupies a special place in the system of European blood donorship, which is stressed by many Italian and other researchers—because here, unlike in Northern Europe, volunteering and blood donor associations play a dominant role.<sup>4</sup> They deal primarily with promoting blood donation at the regional level, although the scope of their activity is national. The oldest (and currently the largest) such organization is AVIS (Associazione Volontari Italiani di Sangue) founded in 1927 in Milan and initially centered on small branches created in factories and other workplaces, which soon “became the basis of a tight territorial network,” extended until today. Currently, the regional branches of AVIS, operating in many cities, not only

organize promotional and advertising campaigns, training courses for donors and managers, studies and research, but above all cooperate with institutions of the National Sanitary Service (*Servizio Sanitario Nazionale*) in building and creating the architecture of the blood donation system (*l’architettura del sistema-sangue*).<sup>5</sup>

---

2 Cf. “*Il sangue degli altri*”. *Culture della donazione tra gli immigranti stranieri in Italia*, ed. F. Dei, Firenze 2007.

3 This is also partly connected with the emergence of an area of research called *refugee health*, or *medicina delle migrazioni* in Italian.

4 Cf. K. Healy, *Embedded altruism. Blood collection regimes and the European Union’s donor population*, “*American Journal of Sociology*,” 6/2000, pp. 1633-1567.

5 M. Aria, F. Dei, *Il segreto dell’altruismo. Il sistema-sangue e le associazioni di volontariato in Italia*, “*Jura Gentium*,” 1/2016, pp. 53-56. All translations from Italian come from me—M.R.

According to the latest reports, AVIS covers approx. 80% of the estimated demand for blood in Italy, which is a phenomenon on a European scale.<sup>6</sup>

During one of the conferences devoted to the issue of gift-giving, representatives of the association asked Fabio Dei to consult on blood donation among immigrants, and later to conduct an ethnographic survey (*sondaggio etnografico*).<sup>7</sup> Over the last few decades, AVIS has tried to promote (with different results) blood donation among immigrants, especially as they were usually in an age the most suitable to donate blood, and their numbers in the country have been steadily increasing. AVIS was also interested in integrating blood donations into the integration processes, focusing campaigns, among others, on “Different lands, same blood” (“Terre diverse, stesso sangue”). However, it is not only about referring, at the most elementary level, to human unity, but also about going beyond the universal conceptualizations of human community, focusing on highlighting the values associated with urban living (in its local complexity), which are a key element in the development of blood donation.<sup>8</sup>

### “The gift of blood” among Romanian and Senegalese immigrants

Fabio Dei and his team (which comprised of Matteo Aria, Martina Cavazzini, Chiara Di Clemente, Sonia di Giorgio and Giovanni Luca Mancini) in 2006-2007 led a fieldwork project about blood donation in two immigrant communities in Tuscany: a Senegalese one in Pisa and a Romanian one in Florence. The function of the national coordinator of the research was then performed by Mariano Pavanello, cultural anthropologist (an expert in African cultures of the sub-Saharan area, also dealing with

6 AVIS Nazionale, <https://www.avis.it/chi-siamo/identita-e-storia/> As part of Centro Nazionale Sangue Istituto Superiore di Sanità also: the Italian Red Cross CRI (Croce Rossa Italiana), FIDAS (Federazione Italiana Associazioni Donatori di Sangue), and FRATRES (Donatori di Sangue), <https://www.centronazionale sangue.it/node/6> operate (as of 1 July 2019). Here also the foundation acts and legal regulations are available.

7 The research received support as a scientifically significant ministerial project important for the development of the country. It has been approved by the Ministry of Science (Ministero della Ricerca e dell'Università) in 2005 and incorporated in the module “Sangue, cittadinanza, solidarietà” (“Blood, citizenship, solidarity”). Funds granted under the so-called PRIN (Programma di Ricerca di Interesse Nazionale—Relevant Researches of National Interest), <https://www.researchitaly.it/en/research-projects-of-national-interest/> (access: 01.07.2019).

8 M. Aria, F. Dei, *Il segreto dell'altruismo*, op. cit., p. 57. Cf. F. Dei, *Introduzione. Il dono del sangue tra realtà biomedica, contesti culturali e sistemi di cittadinanza*, in: *Il dono del sangue. Per un'antropologia dell'altruismo*, eds. F. Dei, M. Aria, G.L. Mancini, Pisa 2008, pp. 9-40.

the transformation of the gift theory).<sup>9</sup> Also interesting for anthropologists were the materials collected by Anna Maria Fantauzzi on blood donation among Moroccan communities in Italy<sup>10</sup> used for comparative analysis. In addition to a good recognition of the mechanisms and patterns of behavior associated with blood donation in one’s own country, it was also necessary to recognize, as far as possible, what shapes different than expected attitudes of immigrants towards blood donation. The divergence of attitudes and behaviors has its origin not only in cultural diversity, in culturally conditioned perceptions of body and blood, community, solidarity and assistance to the other, in culturally shaped and sustained blood-related imaginaries and conceptualizations of health and illness. It also stems from the position immigrants take in a new community: especially if the needs of their own communities are sometimes marginalized.<sup>11</sup> The biographical interviews provided information on migration routes, forms of assistance known from the original place of residence and culturally appropriate ways of understanding human solidarity (as well as knowledge of the forms of assistance and manifestations of solidarity already encountered by the interviewees in Italy), in addition to attitudes towards medical services and the knowledge they provide. Particular attention was paid to any prior experience with the donation of blood.

### *Dirt and blood?*<sup>12</sup> Blood donorship among Romanian immigrants

In the case of a group of Romanians living in Florence, twelve extensive biographical interviews were conducted at the AVIS headquarters and at the premises of the *Cultura progresso e fratellanza nel mondo Italia—Romania* association (Culture, Development and Fraternity in the World: Italy—Romania). The interviewees were adult men and women who obtained the age of majority before 1989 and who had been resident in Italy for at least several years. These immigrants’ accounts

---

9 Cf. M. Pavanello, *Le società acquisitive e i fondamenti razionali dello scambio*, Milano 1993. Idem, *Il dono del sangue*, in: “*Il sangue degli altri*”, op. cit., pp. 100-105.

10 Full results published in the monograph: A. Fantauzzi, *Sangue migrante. Pratiche e culture dell’emodonzione tra Marocco e l’Italia*, Milano 2012.

11 The problems of acculturation will not be the subject of my discussion in this article, nor will be any description of the social fabric of native cultures of Italian immigrants.

12 Subtitle of Małgorzata Rejmer’s book, *Bukareszt. Kurz i krew*, Wołowiec 2013.

were dominated by dissatisfaction, anger and bitterness about their current living conditions, far from the expectations with which they set out on their journey to Italy. Also, their relationships with the immigrant community seemed very loose—speaking of a Romanian community would be a vast exaggeration here. “Romanian” identity, however one understands it, ... seemed to be rather a burden, probably due to the clash with extremely negative media messages and circulating stereotypes stigmatizing Romanians.<sup>13</sup>

In these biographical narratives, “an important role was played by the memory of life in the Ceausescu era, presented as a struggle for existence in a definitely hostile world, in which everyone follows their own particular interests and no one can be trusted.”<sup>14</sup> At the time, people felt that sincerity, loyalty and solidarity were becoming increasingly looser. The informants mentioned blood donations in Romania carried out in military units, schools, and factories. The benefits of blood donation could be a day or two off work. Among people coming from the countryside a belief that “bloodletting” had a positive effect on the body, and promoted its cleansing was common.<sup>15</sup>

Dei notes that such a point of view somehow undermines the meanings that Italian associations would like to see in blood donation: “This is no longer a sacrifice for others, but first of all, a practice that is rewarding for us.”<sup>16</sup> It therefore turns potential donors into self-donors. Similar conclusions were drawn a few years earlier by Lucia Bocaccin and Giancarlo Tamanza, who, among other things, studied the activities of the third sector in Italy and the existing voluntary structures there, describing the activities of AVIS in detail.<sup>17</sup> They mentioned that the motivation for Romanian immigrants to donate blood was rather “self-referential” and “ego-syntonic,” related to the positive valorization of the activity, which was to bring measurable benefits to the individuals performing it.

This evaluation, as Dei stresses, was deeply rooted in the folk beliefs passed down from generation to generation and the convictions about blood shared within the Romanian community (*rappresentazioni e credenze folk riguardo di sangue*). During the interviews, the Romanians explained that as a result of excessive consumption of heavy foods in winter

13 F. Dei, *Il dono del sangue: modelli culturali e forme di cittadinanza*, “La Ricerca Folklorica,” 58/2018, p. 20.

14 Ibidem, p. 21.

15 S. Di Giorgio, G.L. Mancini, *Imigranti romeni, donatori esangui. Simbolismo del sangue e valori di solidarietà presso la comunità romena di Firenze*, in: “*Il sangue degli altri*”, op. cit., pp. 52-56.

16 F. Dei, *Il dono del sangue*, op. cit., p. 21.

17 L. Bocaccin, G. Tamanza, *Volontariato e donazione di sangue. Il caso dell'AVIS*, Roma 1997.

and relatively less physical activity, the quality and quantity of blood produced “rises” and “swells;” the changes over time; it is periodic, because the blood “renews itself” periodically. When giving blood, Romanians were often guided by the conviction that such “bloodletting” had health benefits, above all—in a literal and metaphorical sense—it promoted the regeneration of the body and its purification, because it has not only biological but also “spiritual” aspects. It frees one from “negative things,” and also from widely understood “impurities.” “The contradiction that lies in giving ‘unclean’ blood to others was apparently not seen [by interviewees],” as some of them claimed that “this blood has a good effect on others, even if one’s own body needs to free itself from it.”<sup>18</sup> One of the people asked during the interview about this “impurity” of the donated blood received an explanation of the problem in medical procedures: the blood is filtered and purified<sup>19</sup> (using advanced and proven technologies). This is what was believed to ensure the safety of recipients. The interviews revealed—on the level of expression—a tangle of notions known from folk therapeutic practices with anthropological-medical categories (such as “balance,” “quality,” “humor”, “excess,” “cold,” “heat,” known since the times of Hippocrates and Galen’s humoral pathology) and elements of contemporary discourse promoting blood donation.

Romanians, using slightly different names of blood groups from those used in the medical classification, also pointed out their relationship with certain character traits and even personality types, and sometimes mentioned the relationships between blood groups and zodiac signs. The interviews often repeated stories about “crazy people” (*i matti*) and “geniuses” (or people on the margins of a given community) who were distinguished from others by their blood type.<sup>20</sup> Only one person among the respondents had donated blood earlier for a fee (in Romania and Germany).

References to human solidarity, to solidarity as an essential value in the life of communities in urban structures, and even to civil rights and duties in the messages promoting blood donation proved to be at most a rhetoric detached from reality (*un’astratta retorica*) in relation to Romanian communities, completely out of touch with the world they knew on a daily basis (whether in Romania or as immigrant, especially as the Italians were perceived as inhospitable and clearly hostile to them). “These forms of discourse,” Dei stresses, “were unclear to them,” and their own biographies were proof of the incompatibility of their slogans with life experience.<sup>21</sup>

18 F. Dei, *Il dono del sangue*, op. cit., p. 21.

19 S. Di Giorgio, G.L. Mancini, *Immigranti romeni*, op. cit., p. 63.

20 Ibidem, pp. 57-60.

21 F. Dei, *Il dono del sangue*, op. cit., p. 21.

## *Teranga* and the gift of blood among the Senegalese community in Pisa

Interviews conducted among Senegalese who came to Tuscany brought different data, both in terms of the degree of integration into the Italian community and the motives for donating blood. Two researchers, Martina Cavazzini and Chiara Di Clemente not just carried out biographical interviews, but also accompanied the everyday life of the Senegalese community for a few months. The immigrants were mostly men who had previous experience of many migrations and moves to different countries. Many of them had an intention to return to their homeland in a distant future. In the community studied, “the context of the receiving culture (and internal relations within the local migrant community, which universalized the context of Muslim religion and culture, as well as the context of the traditional culture from which they come” were intertwined. This multitude of diverse contexts “also manifested itself in the area of medical knowledge and medical practices.”<sup>22</sup>

Pisan Senegalese, well acquainted with the institutional health care system functioning there, used its services willingly, with a sense of security and trust in biomedical techniques. However, their system of ideas about healing also included “elements of Islamic medicine and the practice of traditional healers (even in the form of remote telephone consultations), creating a configuration of an extremely interesting system of medical pluralism.”<sup>23</sup> Cavazzini and Di Clemente also devoted a lot of attention to the subject-matter of gift-giving strongly exposed by their interviewees. They admitted that

Senegal has, through colonization, partly internalized European gift-giving practices ... even in the course of conversations in the native language, the French terms *don* and *cadeau* were used, which emerged when we discussed gifts (*doni*) and presents (*regali*) and it was partly their perception thereof as cultural elements of foreign origin.<sup>24</sup>

22 F. Dei, *Il dono del sangue*, op. cit., p. 21. Dei referred to the work of Bruno Riccio, who even regarded Senegalese immigrants in Italy as representatives of a transnational culture (*transnazionale*). Cf. B. Riccio, *Spazi transnazionali: esperienze senegalesi*, “Afriche e Orienti,” 3-4/2000, pp. 62-66.

23 F. Dei, *Il dono del sangue*, op. cit., p. 21.

24 M. Cavazzini, C. Di Clemente, *Conversando i doni, sangue e solidarietà con immigranti senegalesi a Pisa*, in: “*Il sangue degli altri*”, op. cit., p. 27.



The European concept of gift-giving was not accepted uncritically. On the contrary, they would refer to their traditional institution called<sup>25</sup> *Teranga*<sup>26</sup> in the Wolof language. This term is nowadays translated into foreign languages (French, English) as hospitality, but from an emic point of view—as Di Clemente and Mancini’s interviews show—it does not fully correspond to the meanings that *hospitalité* and *hospitality* carry in their original linguistic settings.

In the stories of Senegalese immigrants, *teranga* appears as a basic and inalienable form of disinterested and anonymous (at least in the ideal formula) help. One of its forms is the practice called the “night gift”—*dono notturno*—which consists in leaving material goods in front of the homes of those most in need in such a way as not to be noticed. No direct contact is made, nor is reciprocity required to the specific donor thanks to the anonymity. This does not mean, however, that *teranga* does not involve the principle of reciprocity. Quite the opposite. Simply,

reciprocity does not lie in the fact that one is obliged to give back to the person from whom they received something. One gives back to someone who is in a difficult situation. ... when the individual, who had previously received help achieves a decent economic status, they will rather prefer to exploit what they have, helping others rather than bestowing on those who had helped them. Therefore, one of our interlocutors spoke about the absolute imperative of giving [*imperativo assoluto del dare*].<sup>27</sup>

It resembles the “ether of obligation” or “obligatory freedom” that Mauss mentioned. Senegalese do not speak—like the Maori—about “the spirit of the given, *hau*” but they know that the exchange process should not be interrupted. To maintain it, you do not need to return the same thing to the same person, you just need to give—even to someone else—an “equivalent

---

25 The Wolof language, which belongs to the family of Nigerian-Congo languages, is currently spoken not only by the Wolof ethnic group who live in West Africa, mainly in Senegal, Gambia and Mauritania, but also by other inhabitants of the area, where it is gaining the status of a vehicular language facilitating communication between ethnically diverse populations. Some of the interlocutors of Chiara Di Clemente and Martina Cavazzini, who were also fluent in Italian, explained that the openness of the Wolof people and their love for trade contributed to the spread of the language in this area. The official language (and thus applicable also in school education), however, remained French. Cf. classification of languages available on the Ethnologue. Languages of the World platform at <https://www.ethnologue.com/language/wol> (access: 01.06.2019).

26 Apart from the Wolofs, the *teranga* institution is also known to other ethnic groups living in Senegal and Gambia: the Serer, the Toucouleur, the Jola, thus going beyond the native belief systems (animism) and the religions (Islam and Christianity).

27 M. Cavazzini, C. Di Clemente, *Conversando i doni, sangue e solidarietà*, op. cit., p. 33.

that will replace it.”<sup>28</sup> The act of giving does not have to be regular, but requires a willingness to help (a person who turns away from the needy is called “bad”—*cattivo* and this has a strong emotional, but above all, moral overtones).<sup>29</sup>

The Senegalese attitude towards active blood donation was very much influenced by the “unwavering relationship” (*saldi legami*) with their country of origin, the sharing of ethical and religious values and the spirit of solidarity (*spirito di solidarietà*),<sup>30</sup> which is still alive in the exchange institution of *teranga*. Also, in the new conditions, there was a strong sense of belonging to a religious groups and prayer communities (some of them engaged in the promotion of blood donation), but above all, there was a clear and proudly articulated awareness of creating a permanent group, all the stronger that it was based on a community of origin:

Senegalese origin was perceived as a strong and positive element of identification. As a result, native culture was seen as the object of extremely positive perceptions; it also sometimes became the main object of more or less nostalgic memories and recollections which, in a somewhat stereotypical way, were contrasted with features of Italian or European culture such as individualism or consumerism.<sup>31</sup>

Thus, we can speak here of a situation that is completely different from that observed in the group of Romanian immigrants in Florence, who, as a result of centuries of completely different experiences, rather held to the “everyone for himself” (*“ognugno per se”*) principle than tried to rebuild community ties based on cooperation and trust. Among the Senegalese interviewees, it is worth noting that there were also people who had been in Italy for a long time and had cooperated with many associations, such as *Africa insieme* (Africa together) or *Batik*, and even represented them. Among them were also some who obtained a university degree. According to the researchers, Senegalese immigrants not only successfully updated important elements of their cultural heritage under new conditions, but also achieved a high degree of integration into the host community. The ready on-call model (*il modello della “chiamata”*), which was clear among

28 M. Mauss, *Sociologia i antropologia*, introduction by C. Lévi-Strauss, transl. by M. Król, K. Pomian and J. Szacki, Warszawa 2001, pp. 180-182.

29 “More than one of our interlocutors used this adjective to describe people who turned away from direct requests for blood donations,” the researchers add. M. Cavazzini, C. Di Clemente, *Conversando i doni, sangue e solidarietà*, op. cit., p. 36, footnote 10.

30 F. Dei, *Dono, corpo, cittadinanza. Implicazioni culturali della donazione del sangue presso comunità immigranti stranieri in Toscana*, in: “*Il sangue degli altri*”, op. cit., p. 18.

31 F. Dei, *Dono, corpo*, op. cit., p. 18.

the Senegalese, who most often donated blood in response to the appeals of religious leaders or the demands made by hospitals and schools<sup>32</sup> even before their arrival in Italy, also functioned among the Moroccans living in Turin.<sup>33</sup>

It turned out that the official message of AVIS was not fully understood and supported by both Romanian and Senegalese immigrants currently living in Italy.<sup>34</sup> The first believed donating blood as a “pro-health” activity, not necessarily connected with the idea of sharing with others, with a “gift of self,” fraternity and solidarity, while the latter placed the greatest emphasis laid on the care of the relationships between people, creating interdependent networks of local relations: from the family to the appropriate religious communities.

## Theories of gift and social pluralism discourses

In global studies of blood donation, an important role is played by two widely discussed works: *The Gift Relationship. From Human Blood to Social Policy*<sup>35</sup> by Richard Titmuss (1970) and *L'esprit du don* by Jacques T. Godbout (1992).<sup>36</sup> The first, considered a classic work in social policy, contains a comparative analysis of the blood donation systems in the United States and the United Kingdom operating in the first few decades after the World War II. Titmuss pointed to the “marketization” of the blood donation system (including the creation of blood banks) in the United States, where blood was donated for a fee, and juxtaposed it with the British system supported by disinterested donation rather than commercial transactions. He opposed European solutions, in which he saw examples of “modern altruism” to the American “possessive egoism of the marketplace,” preferring a desire to possess and love for oneself over helping others. He even

---

32 Interestingly, Senegalese immigrants were convinced that thanks to their commitment to helping others, and therefore also in the shares of blood, their full availability and openness to giving—especially in the case of requests for help—blood should not be scarce. Dei notes that this was in contradiction with the official data, which did not correspond to the image created within the group. *Ibidem*, p. 20.

33 In Piedmont, unlike in Tuscany, there was much more interest in games and festivals and blood donation events organized during them (they were also aimed at strengthening integration between immigrants and the local population). The Senegalese approached these events with much greater distance, preferring individual donorship. However, indicating the reasons for these differences would require further in-depth analysis of the materials collected.

34 F. Dei, *Dono, corpo*, op. cit., p. 23.

35 R.M. Titmuss, *The Gift Relationship. From Human Blood to Social Policy*, London 1970.

36 J.T. Godbout, *L'esprit du don*, Paris 1992.

defined his book as “a study of the role of altruism in modern societies.”<sup>37</sup> One of its most pronounced manifestations was to be the “selfless gift of blood.”<sup>38</sup> Dei notes that

Titmuss resigns from the Maussian triad: “give, receive and reciprocate” for the idea of altruism ... In his opinion, ... individuals are not born as altruists, but learn to become them to be thanks to the institutions that support the moral sentiments respecting the needs of others.<sup>39</sup>

He opposes social values related to cooperation and interoperability the commercialization of medical practice, which leads “to the erosion of ethical relations, and subordinates medical aid to pure profit.”<sup>40</sup> This was also in line with his concept of the state (*Social Welfare*, *Welfare State* as a state of prosperity and social security) and the typology of European social policy models proposed several years later.<sup>41</sup>

Titmuss’ monograph met with polemics on many occasions—some of the critical voices were included in its 1997 reissue.<sup>42</sup> Titmuss opponents also included Jacques Godbout associated with *La Revue du Mouvement Anti-utilitariste dans les Sciences Sociales*. He categorically rejected the idea that the state should promote altruistic behavior, including—selfless blood donation. On the contrary, he felt that the state “tears apart gift networks by favoring individualistic and technocratic behavior.”<sup>43</sup> Unlike the British sociologist he stressed that “blood donation is not working *through* the state, but *in spite of* its interventions that destroy the chain of giving, receiving and reciprocity.” What sustains the existence of disinterested blood donation is a “spirit of giving” (*l’esprit du don*), manifesting itself in voluntary action of the donor, who does not expect any compensation. It manifests itself, however, only at the beginning: in the gesture of a gift-giver. Godbout argues that the presence of intermediaries in the case of a state system of blood donorship distorts the true nature of gift-giving. The

---

37 R.M. Titmuss, *The Gift Relationship*, op. cit., p. 141.

38 He also presented a typology of blood donors, ordering them into those who donate blood in order to receive payment to those located at the end of the eight-point scale who do the same, but are guided by the best interests of the community. Ibidem, pp. 128-141.

39 M. Aria, F. Dei, *Il segreto dell’altruismo*, op. cit., p. 59.

40 Ibidem.

41 Cf. R.M. Titmuss, *Social Policy. An Introduction*, New York 1974.

42 Cf. R.M. Titmuss, *The Gift Relationship. From Human Blood to Social Policy*, eds. A. Oakley, J. Ashton, New York 1997.

43 I was using the Italian version: J.T. Godbout, *Lo spirito del dono*. In collaborazione con A. Caillé, trad. A. Salsano, Torino 2002, p. 78.

beneficiary, therefore, receives no blood as a “gift,” but “as a medical treatment, which he has the right to as a citizen.”<sup>44</sup>

Nowadays, however, in the conditions of global medicalization, the question arises whether it is possible to go beyond the opposition thus posed: blood as a “true gift” and blood as a “neutralized,” “depersonalized” product. What is more, several decades after Titmuss and Godbout, the conditions of its transmission have changed significantly. This was due to a number of various factors, among which Dei lists the spread of AIDS as the most important one.<sup>45</sup> The threat of this disease has modified and tightened safety requirements in practices related to any contact with blood, i.e. also in institutionally organized blood donation, improved planning of blood collection, introduction of “indirect donation,” which is now made possible by new methods of blood filtration, obtaining blood-derivatives, production of blood-based drugs on a wider scale and the spread of other types of donation applicable to other parts of the body<sup>46</sup> (e.g. organs, stem cells, semen and even human milk<sup>47</sup>).

## The multiplicity of practices, pluralism of discourses

Research carried out by Fabio Dei and his team in the immigrant communities in Tuscany helped draw attention to the fact that going beyond the gift-market opposition (*oltre la dicotomia dono-mercato*) has become not only desirable, but even necessary. Here, as the author argues,

the donation system shows the complicated relationship between the systems of gift-giving, the market and the state, and the specific biomedical technologies. This practice, in which altruism is somehow forced to connect to various forms of mediation, specialized (professional) and academic expertise ... The interface (*interfaccia*) between the state and society, between the abstract subjectivity in the legal system and the concrete one, manifested in local ties, is one comprising of the moments of our social

---

44 M. Aria, F. Dei, *Il segreto dell'atruismo*, op. cit., p. 62.

45 Titmuss draw the attention to the risk of a hepatitis infection from a transfusion. Idem, *The Gift Relationship*, op. cit., pp. 70-73. In 1980-1990, many people were infected by hepatitis and also HIV in this way. Cf. A.-M. Casteret, *L’Affaire du sang*, Paris 1992.

46 The 2018 edition of Titmuss’ work was expanded with discussion of these issues.

47 Fabio Dei gave a lecture titled *Donar il corpo. Sangue, altruismo e bene comune* on this subject at the tenth edition of the event in Pistoia. Dialoghi sull’uomo, 26 May 2012. Idem, *Quel che non si può vendere: L’economia morale della donazione del sangue*, “*Snodi pubblici e privati nella storia contemporanea*”, 9-10/2012, pp. 70-83. Cf. also K. Healy, *Lasts Bests Gifts. Altruism and the Market for Human Blood and Organs*, Chicago 2006.

life, in which the dimensions (*dimensioni*) are almost always separated from each other, immersed in incomparable languages and moral concepts (*immerse in linguaggi e concezioni morali incommensurabili*). What is happening today requires relational thinking, strongly rooted in a particular territory, in the local community, a reflection that knows not only the language of the gift, but is also able to translate it into other forms.<sup>48</sup>

This translation would necessarily have to have a contextual dimension, i.e. it would have to relate to the forms of realization of the gift—especially the gift of blood—at a specific time and place, taking into account historical-cultural conditions and current variables. Blood donation research is now carried out globally by doctors, sociologists and cultural researchers—humanists, always taking into account the cultural context.<sup>49</sup> It is obvious that the multiplicity of cultural practices corresponds to the multiplicity of the most disproportionate (and sometimes competing) discourses. The complexity of cultural reality and the pluralism of discourses—not always used to describe it, but rather to interpret it, does not exempt us from the obligation to recognize them and from attempts at multi-level translation.

#### BIBLIOGRAPHY

- Aria M., Dei F., *Il segreto dell'atruismo. Il sistema-saghe e le associazioni di volontariato in Italia*, "Jura Gentium," 1(2016), pp. 53-56.
- Aria M., *Doni di Mauss. Percorsi di antropologia economica*, CISU, Roma.
- AVIS Nazionale, <https://www.avis.it/chi-siamo/identita-e-storia/> (access: 01.07.2019).
- Boccacin L., Tamanza G., *Volontariato e donazione di sangue. Il caso dell'AVIS*, Fondazione It. Volontariato, Roma 1997.
- Casteret A.-M., *L'Affaire du sang*, Éditions La Découverte, Paris 1992.
- Culture del dono*, eds. M. Aria, F. Dei, Meltemi, Roma 2008.
- Dei F., *Cultura popolare in Italia. Da Gramsci all'Unesco*, Il Mulino, Bologna 2018.
- Dei F., *Introduzione. Il dono del sangue tra realtà biomedica, contesti culturali e sistemi di cittadinanza*, in: *Il dono del sangue. Per un'antropologia*

48 M. Aria, F. Dei, *Il segreto dell'atruismo*, op. cit., pp. 62-63. Also cf. *Culture del dono*, eds. M. Aria, F. Dei, Roma 2008; M. Aria, *Doni di Mauss. Percorsi di antropologia economica*, Roma 2016.

49 Cf. e.g.: N. Wittock, L. Hustings, P. Bracke, V. Buffel, *Who donates? Cross-country and periodical variation in blood donor demographics in Europe between 1994 and 2014*, "Translation" 11(57)/2017, pp. 2619-2628; J.K. Makin, K.L. Francis, M.J. Polonsky, A.M.N. Renzaho, *Interventions to Increase Blood Donation among Ethnic/Racial Minorities: A Systematic Review*, "Journal of Environmental and Public Health," 2019, pp. 1-14. Currently I am also collecting information on the forms of blood donation in Poland.

- dell'altruismo, eds. F. Dei, M. Aria, G.L. Mancini, Pacini, Pisa 2008, pp. 9-40.
- Dei F., *Il dono del sangue: modelli culturali e forme di cittadinanza*, “La Ricerca Folklorica” 58(2018), pp. 19-29.
- Dei F., *Medicine non convenzionali: una prospettiva antropologica*, in: *Le parole dell'antropologia medica. Piccolo dizionario*, ed. D. Cozzi, Morlacchi, Perugia 2012, pp. 157-180.
- Dei F., *Spettri del biopotere*, in: *Storie di un altro mondo. Percorsi di etnografia delle migrazioni*, eds. F. Bachis, A.M. Pusceddu, CISU, Roma 2013, pp. 45-65.
- Ethnologue. Languages of the World*, <https://www.ethnologue.com/language/wol> (access: 01.06.2019).
- Fantauzzi A., *Sangue migrante. Pratiche e culture dell'emodonzione tra Marocco e l'Italia*, Franco Angeli, Milano 2012.
- Godbout J.T., *L'esprit du don*, Éditions La Découverte, Paris 1992.
- Godbout J., *Lo spirito del dono*, in collaborazione con A. Caillé, trad. A. Salsano, Bollati Boringheri, Torino 2002.
- Healy K., *Embedded altruism. Blood collection regimes and the European Union's donor population*, “American Journal of Sociology,” 6(2000), pp. 1633-1567.
- Healy K., *Lasts Bests Gifts. Altruism and the Market for Human Blood and Organs*, Chicago University Press, Chicago 2006.
- “Il sangue degli altri.” *Culture della donazione tra gli immigranti stranieri in Italia*, ed. F. Dei, AVIS Book, Firenze 2006.
- Makin J., Francis K.L., Polonsky M., Renzaho A., *Interventions to Increase Blood Donation among Ethnic/Racial Minorities: A Systematic Review*, “Journal of Environmental and Public Health,” 1(2019), pp. 1-14. DOI: 10.1155/2019/6810959
- Mauss M., *Sociologia i antropologia*, introduction by C. Lévi-Strauss, transl. M. Król, K. Pomian and J. Szacki, Wydawnictwo KR, Warszawa 2001.
- Pavanello M., *Le società acquisitive e i fondamenti razionali dello scambio*, Franco Angeli, Milano 1993.
- Programma di Ricerca di Interesse Nazionale. Relevant Researches of National Interest, <https://www.researchitaly.it/en/research-projects-of-national-interest/> (access: 01.06.2019).
- Rejmer M., *Bużareszt. Kurz i krew*, Wydawnictwo Czarne, Wołowiec 2013.
- Riccio B., *Spazi transnazionali: esperiene senegalesi*, “Afriche e Orienti,” 3-4(2000), pp. 62-66.
- Titmuss R.M., *The Gift Relationship. From Human Blood to Social Policy*, Allen and Unwin, London 1970.
- Titmuss R.M., *Social Policy. An Introduction*, Pantheon Press, New York 1974.
- Titmuss R.M., *The Gift Relationship. From Human Blood to Social Policy*, eds. A. Oakley, J. Ashton, The New Press, New York 1997.

Wittock N., Hustings L., Bracke P., Buffel V., *Who donates? Cross-country and periodical variation in blood donor demographics in Europe between 1994 and 2014*, "Translation," 11(2017), pp. 2619-2628.



**Małgorzata Rygielska**—adjunct at the Institute of Culture Studies and Interdisciplinary Studies at the University of Silesia. Conducts research in the theory of culture, history of Polish culture, literature, cultural anthropology, cultural history of medicinal and hygienic practices in Europe. Author of books: *Dwa guziki. Norwid i ewolucjonizm* (2011), *Przyboś czyta Norwida* (2012), *Monografia Ignacego Lubicz Czerwińskiego Okolice Za-dniestrską. Studium kulturoznawcze* (2019), co-editor (with Anna Gomóła) of *Starość jako wyobrażenie kulturowe* (2013). She has published articles *O fizjologii* ("Kultura Współczesna" 2013), *Uroki auskultacji, czyli krótka historia stetoskopu* ("Kultura Popularna" 2016).



**Barbara Geneja-Pietrzak**

<http://orcid.org/000000001-7528-611X>  
Jesuit University Ignatianum in Krakow  
[geneja.barbara@gmail.com](mailto:geneja.barbara@gmail.com)  
DOI: 10.35765/pk.2019.2704.14

## The Spruce in the Culture of the Podhale Shepherds

### ABSTRACT

In this article I tackle the issue of the worship of spruce trees in the culture of the shepherds in Podhale, a region in southern Poland. This is an issue related to the particular significance of the spruce. It has played a great role in the culture of the whole Podhale region, and especially in the pastoral culture of this area. The spruce was elevated to the rank of a symbol of good luck, prosperity and well-being. All activities carried out in the work of shepherds were connected with the ceremonial treatment of spruce trees. It should be noted that these activities were religiously and magically motivated, as spruce twigs were blessed in the church beforehand. However, this does not change the fact that the rituals were magical. An example would be the custom according to which shepherds would pin spruce or fir twigs to their hats, believing that this would keep them and their sheep safe. Nowadays, shepherding culture enjoys great interest among researchers, as well as among Polish and even foreign communities, who apply for participation in shepherding courses organized today. The magic associated with pastoral culture was also reflected in Polish literature and dialect poetry. Readers can refer to the works of such poets and writers as: Seweryn Goszczyński, Kazimierz Przerwa-Tetmajer, Władysław Orkan, and Stanisław Witkiewicz or dialect poets Wanda Szado-Kudasikowa and Roman Dzioboń.

**KEY WORDS:** sacred tree, spruce, magic, Vlachs, pastoral culture, literature, poetry

## STRESZCZENIE

*Rola świerka w kulturze pasterskiej Podhalan*

W zaproponowanym przeze mnie artykule zajmuję się zagadnieniem kultu świerka w kulturze pasterzy na Podhalu, regionie w Polsce Południowej. Jest to temat związany ze szczególnym znaczeniem drzewa, jakim jest świerk. Odegrał on na całym Podhalu, a zwłaszcza w kulturze pasterskiej tego obszaru ogromną rolę. Został wyniesiony do rangi symbolu szczęścia, pomyślności i dobrobytu. Wszelkie czynności wykonywane w pracy pasterzy związane były z uroczystym traktowaniem świerka. Należy zaznaczyć, iż czynności te miały religijno-magiczne motywacje, bowiem gałązki świerka poświęcone były wcześniej w kościele. Nie zmienia to jednak faktu, iż późniejsze rytuały miały charakter magiczny. Przykładem będzie choćby zwyczaj, zgodnie z którym pasterze przypinali gałązki świerka bądź jodły do kapelusza, wierząc, że im samym oraz owcom nic nie zagraża. Współcześnie kultura pasterska cieszy się ogromnym zainteresowaniem wśród badaczy naukowych zarówno z Polski, jak i z zagranicy, którzy zgłaszają swoje uczestnictwo w organizowanych dzisiaj kursach bacowskich. Magia związana z kulturą pasterską znalazła swoje odbicie również w literaturze polskiej oraz poezji gwarowej. Czytelnicy mogą sięgnąć po dzieła takich autorów jak Seweryn Goszczyński, Kazimierz Przerwa-Tetmajer, Władysław Orkan, Stanisław Witkiewicz oraz po dzieła twórców poezji gwarowej: Wandy Szado-Kudasikowej, Romana Dziobonia.

SŁOWA KLUCZE: kult, drzewo, świerk, magia, Wołosi, kultura pasterska, literatura, poezja

## Introduction

Today, the shepherding culture is experiencing some revival in the areas of the Polish-Slovakian border region, including Podhale and Orava. This is the result of a number of EU projects which are aimed at raising regional awareness and cultivation of native traditions. In 2017, the Małopolska School of Hospitality in Myślenice organized a shepherding course, directed to all those interested in learning under the motto “How to work the Podhale pastures?” One hundred twenty-one individuals signed up for this free course, including people from across Poland, Romania and the UK. The apprentice course included 42 hours of theory and 160 hours of field work and was intended to prepare the apprentices to help with the shepherds’ work. The course was

intended to prepare the participants to work with sheep and to the role of senior shepherd. On the other hand, it was addressed to experienced shepherds who wanted to confirm their skills with a certificate. The shepherding work involves hard manual labor and long-term solitude in the pastures, often for months, which the course participants were fully aware of. The project was aimed not only at supporting the dying out professions, but above all at emphasizing the strengths and foundations of highland culture.<sup>1</sup> In Podhale, an annual Shepherds' Festival has been held annually since the 1980s, around the feast of St. Adalbert [patron saint of spring and shepherds in Slavic folk culture—transl.]. It gathers more and more Carpathian shepherds. They participate in Holy Mass in the basilica in Ludźmierz, celebrated for the purpose of successful pasture. The celebrations of blessing the sheep and shepherd's equipment are also held every year on Tarasówka in Małe Ciche. The celebrations, older than those in Ludźmierz, have a more local character.<sup>2</sup>

Topics related to shepherding culture occupy more and more place in ethnographic works. Researcher Ewa Kocój has been investigating shepherds' culture related to the cultural heritage of Vlachs, from Albania to the northern Carpathians, since 2015. These studies are part of the NPRH grant "Vlachs in Polish and European cultural space."<sup>3</sup> Kocój's current research, as well as the earlier work of ethnographers such as: *Pasterstwo Tatr Polskich i Podhala* by W. Antoniewicz, *Osady prawa wołoskiego i ich mieszkańcy na Rusi Czerwonej w późnym średniowieczu* by G. Jawor or *Językowo-kulturowy obraz Wołochów i Wołoszczyzny w języku polskim* by J. Porawska prove that the Podhale shepherding customs have their roots in the distant statutes of Vlachian law.<sup>4</sup>

1 <https://www.pulshr.pl/rekrutacja/kurs-zawodowy-na-bace-i-juhasa-co-czeka-kandydatow-na-egzaminie,45618.html> (access: 22.01.2019).

2 A. Mlekodaj, *Kwietno Pani. O gwarowej poezji Podhala w ujęciu kulturowym*, Rabka Zdrój 2015, p. 61.

3 E. Kocój, *Śladami ostatnich wędrujących pasterzy karpackich. Raport z wiosennego redyku rodziny Szczechowiczów (kwiecień 2018)*, "Almanach Nowotarski," Podhalańskie Towarzystwo Przyjaciół Nauk w Nowym Targu, No. 22, 2018, p. 179.

4 Vlachs are a nation originating from Romania, which includes also Aromanians stemming from the Balkan Peninsula. In the thirteenth century, they began to migrate north, where several Danubian principalities formed and united later in the two states: Moldavia and Wallachia. In the sixteenth century the area was completely conquered by the Turks, which resulted in further Vlachian migration. Grzegorz Jawor, a researcher of the Vlach history, says that in 1202 the Drag (Saxon) people came to the Red Ruthenia, and in 1262 the family of Drohomirecki of the Sas coat of arms is noted. This family belonged to Wallachian peoples. G. Jawor, *Osady prawa wołoskiego i ich mieszkańcy na Rusi Czerwonej w późnym średniowieczu*, Wydawnictwo Uniwersytetu Marii Curie-Skłodowskiej, Lublin 2004. Thus, we know that the Vlachs arrived in the area of today's Southern Carpathians in the thirteenth century, from where they expanded on until the fifteenth century, as they reached the area of Podhale. The first village founded by them [in the

In connection with the contemporary revival of the herding culture in my own scientific and personal interests, I made an attempt to investigate the question of spruce worship<sup>5</sup> in the culture of the Tatra shepherds. In preparation, I mainly used the method of analyzing existing materials on top of the method of diagnostic survey, including interviews. In order to develop a research problem, I reached for such literature as *Wierzenia i praktyki magiczne pasterzy in: Pasterstwo Tatr polskich i Podhala* by B. Bazińska, *Podhalański baca – pasterz, czarownik i protoplasta góralskiego zdobnictwa* by W. Bachleda-Dorcarz, and *Czary góralskie. Magia Podatrzka i Beskidów Zachodnich* by U. Janicka-Krzywda and K. Ceklarz.

## Holy trees

Podhale is not an isolated area in terms of tree worship, namely, with honoring them and treating them as symbols of life and fertility, or recognizing them as epiphanies of supernatural power, places of revelation or abodes of deities. It has been around since the dawn of history in many cultures around the world. Many researchers of Indo-European culture

---

Polish Carpathians—transl.], chartered on the Vlach law in 1416, was Ochotnica. Dawid Wołoch, the founder of the village, received the foundation charter from the king Władysław II Jagiełło. As they migrated, the Vlachs brought original ways of grazing sheep to the new mountain areas, consisting of cyclical moving the herds of summer mountain pastures to lowland pastures for the winter. The livestock farming economy built by the Vlachs is visible to this day among the inhabitants of the Carpathian Mountains (Lemkos and Tatra highlanders). Furthermore, the Vlachs brought with them the skills of processing the products obtained from livestock farming, such as milk, wool and leather. Researchers of the Wallachian culture indicate that the population was of an Orthodox Christian denomination. In addition, there are mentions of the beliefs of Vlachs as imbued with numerous prejudices and superstitions, which in part certainly have left traces in the Tatra shepherd beliefs. J. Porawska, *Językowo-kulturowy obraz Wołochów i Wołoszczyzny w języku polskim*, <https://genealogia.okiem.pl/forum/viewtopic.php?f=19&t=22226> (access: 23.01.2019).

- 5 The definition of worship refers to all religious activities or a system of rites in a particular religion. Worship is part of a religious ritual. It is closely associated with honoring someone or something that has a creative power for the cosmos, the world and people. Worship arises from the need to understand the reality surrounding man, and the desire to encounter the sacred in one's environment. Sacrum in folk culture refers to the world of the supernatural and religious values, i.e. God, angels, Virgin Mary, saints, blessed souls, the Church and the clergy that all shape the sphere of holiness. In a wider perspective, sacrum also applies to objects, features and phenomena. In this sense, qualities of holiness are related to trees, rivers, mountains, celestial bodies, rules of life, the elements, as well as the farm, the family, and work. J. Styk, *Sacrum w kulturze ludowej*, <https://pismofolkowe.pl/artykul/sacrum-w-kulturze-ludowej-2494> (access: 26.02.2019). Sacrum manifests itself in a world in which man lives, so man will look out for such elements of the cosmos through which holiness is expressed in the most understandable ways. For this reason, man has created a whole sphere of religious symbols that allow them to communicate with the sacred. *Mały słownik religioznawczy*, ed. Z. Poniatowski, Wiedza Powszechna, Warszawa 1969, p. 241.

claim that the first images of the cosmos in the form of a tree appeared in the fourth millennium B.C., as evidenced by abundant iconography from East Asia and Africa. In many cultures, religious thought remained greatly influenced by nature, which shaped human ideas about the divine essence. Primitive man believed that the world was separated out of chaos and darkness, therefore the creator of that world had tremendous strength and creative power. Mankind searched for the most perfect specimen of nature the surrounding world a chosen by a deity as the personalization of the laws that govern the world. Man attributed this power to the tree, which has become *Arbor Mundi*, the *World Tree*, which stretched around the sacred space, ordering everything that was around.

The symbolism of the World Tree was used to order parts of the world around the horizontal and vertical structure of the Holy Tree. This structure represents the underworld, earth and sky; or the past, present, and future; the ancestors, the present generation, and their descendants; and many other meanings, such as: fire, earth, water in its roots, trunk and branches, respectively. The World Tree embodied an extraordinary life force, giving immortality and knowledge of the universe. It represented the cosmic axis around which life took place in the cyclicity of nature and fertility. *Arbor Mundi* was a connection between the microcosm and the macrocosm, between man and the supernatural world.<sup>6</sup>

The World Tree was present in the religious symbolism of almost all peoples. In the Indian tradition, the Holy Tree was a banyan tree; in the Old Icelandic tradition it was an evergreen ash, and in the tradition of the Greeks and Romans it was an olive tree.<sup>7</sup> In ancient Greece, we can

---

6 I. Kaczor, *Kult drzew w tradycji mitologicznej i religijnej starożytnych Greków i Rzymian*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2001, pp. 47-48.

7 In the Indian tradition, the World Tree is presented a reversed form—roots up—which symbolizes the living, constantly renewing universe, while elements such as the trunk, limbs and branches are one unit. M. Eliade believes that the inverted image of the Cosmic Tree, the *Aśvattha*, was inspired by the way sunlight is dispersed. M. Eliade, *Traktat o historii religii*, transl. J. Wierusz Kowalski, Książka i Wiedza, Warszawa 1966, p. 270.

In the Old Icelandic tradition, the Holy Tree was an evergreen ash, which formed the basis of the world. Two wells sprang at its roots: the source of the living water dedicated to the goddess *Urd*, and *Mimir's* well carrying the water of knowledge. Under the roots of the ash tree, the kingdom of the dead and the land of the giants spread. According to Old Germanic stories, war was being waged between the gods and the evil forces. The universe will be destroyed, and only the evergreen ash will survive, remaining the mainstay of the cosmic order. I. Kaczor, *Kult drzew*, op. cit., pp. 47-48.

In ancient Greece, olive tree branches were also a symbol of happiness and prosperity, and they were often placed in cots of newborn children. In ancient Rome, when a boy was born, a tree was planted, the development of which predicted the subsequent fate of the child. I. Kaczor, *Kult drzew*, op. cit., p. 52.

also find symbolism associated with coniferous trees, also with the spruce. In one of the myths, Artemis decided to turn Actaeon into a deer in the valley of Gargaphia covered with spruce and cypress trees.<sup>8</sup> For the Greeks the spruce was a signifier of death, funeral rituals and mourning.<sup>9</sup> The worship of trees also played a great role in the beliefs of the Slavs, including the ones inhabiting Poland. The oak was surrounded by a special reverence. For them, it was a symbol of longevity and immortality. Another equally magical tree for the Slavic culture was the spruce, that has played a huge role also in the area of Podhale. For the east Slavs, the spruce tree embodied longevity and the beginning of a new yearly cycle. In Belarus, the spruce was seen as cursed tree that grows in dark places. It was never used as a building material, nor was it ever planted in the vicinity of human settlements. In Ukraine, in turn, on the night before Midsummer, spruce twigs would be placed above doors, in the walls of houses and in the thatch of sheds to protect the households against witches, and pigs against diseases. In Russia, spruce needles were sewn into canvas based on a belief that it drove evil spirits away. In the west, spruce trees were used in funeral rites.<sup>10</sup>

In many cultures and traditions around the world, different tree species became objects of worship: oaks, ash and olive trees in Europe or fig trees in the East. In Poland, in the area of Podhale, the spruce played an important role.

## The symbolism of the spruce in Podhale

The standard Polish name for the spruce, *świerk*, has many counterparts in folk dialects, such as *aglija*, *choinka*, *chojna*, *dana*, *eglija*, *jeglija*, *jegli-  
na*, *jeglaska*, *jegliwina*, *jegła*, *skrzek*, *smerek*, *smrek*, *smrok*, *smroczyzna*, *śrok*,

8 Artemis was the goddess of unspoiled, wild forests and hunting, as well as fertility and death. She was also called the Pure and it was widely known that she did not even allow men to look at herself, which was most painfully proved by the young Akteon, grandson of the founder of Thebes, Cadmus. He was a passionate hunter, which could have made the goddess benevolent towards him, as she loved hunting so much. However, he was lost by his carelessness. One day, as usual, he chases game with his pack of dogs in the woods and mountains from dawn to dusk. Birds fled from him and he reached them with his feathered arrows in flight, and made animals hiding shoot out of the woods animals with his javelin. At noon he stopped next to a forest stream. Hidden among the shrubs, he could watch unseen as the goddess Artemis was bathing there together with her companions. He went a step further and the crack of a dry twig betrayed his whereabouts. The goddess saw him. As if jokingly, she sprinkled some water on him. Immediately Actaeon turned into a stag. J. Parandowski, *Mitologia grecka*, Wydawnictwo Puls, Warszawa 1992.

9 I. Kaczor, *Kult drzew*, op. cit., p. 110.

10 K. Szczęśniak, *Świerk, drzewo proste*, "Poznańskie Studia Polonistyczne," Seria Językoznawcza, Vol. 20 (40), Iss. 2.

or *śwer*.<sup>11</sup> Around Podhale, the mainly adopted names are: *smerek* and *smrek*, used in virtually every village in the area, also in the shepherds' culture.

*In the entire region*, the spruce was seen as a mediator between humans and the supernatural. It was credited with protective properties against calamities, evil spirits, or disease. Spruce trees were worshiped as an abode of the sacred according to Tatra highlanders. Podhale Highlanders were convinced that a tree can become angered, which could bring misfortune on people, so no twigs would be ripped off them unnecessarily. It was believed that a spruce tree planted in front of a house protects against evil spells, and the smoke of burnt spruce resin would provide growth and security for the crops.<sup>12</sup>

My grandmother recalls that even in the 1940s, shepherds living in the pastures and all the inhabitants of Podhale would go to Wiktorówki to the sacred *smrek*:

There was a tree on Jaworzynka tree, which was a *smyrek*. First, there was a little figure of the Virgin Mary on it, because the Virgin Mary appear there. Everybody kissed this *smerek*. Then they put a little shrine down below, but we continued kissing this tree. One would always even just touch it with your hand. People came there to treat their teeth so what they would be healthy. They took slivers of wood from this *smerek* home, to bring good fortune.

A shepherd, Wojciech “the Lamé” Łukaszczyk from Murzasichle, remembers events at the Wiktorówki:

A 14-year-old girl, Marysia Murzańska, daughter of Sebastian and Marianna Budz from Groń grazed sheep there. One day fog rose over the pasture. Darkness was approaching, and Marysia was occupied with something in the hut, but she saw that her sheep ran off somewhere. She ran to look for them and directed her steps to the nearby forest on Wiktorówki. She said to herself, Mother of God, where my lambs? Suddenly she saw a dazzling light in a tree, and in this light, she saw a beautiful Lady ... After greeting the Bright Lady, the girl received a reply that the sheep were not gone and that she would see them in a moment. She was also given a command to admonish people to stop sinning and repent for their old sins ... Marysia returned to the pasture and told about everything that happened to her. The

---

11 A. Wierzbicka-Olejniczak, *Nazwy roślin w gwarach kujawskich, maszynopis rozprawy doktorskiej napisanej w Katedrze Dialektologii Polskiej pod kierunkiem prof. dra hab. S. Gogolewskiego*, Łódź 2001, p. 248.

12 U. Janicka-Krzywda, K. Ceklarz, *Czary góralskie. Magia Podtatrze i Beskidów Zachodnich*, Wydawnictwo Tatrzańskiego Parku Narodowego, Zakopane 2014, p. 163.

shepherd of Father Kossakiewicz, W. Łukaszczyk, nailed a religious picture to the tree in an effort to commemorate the site of the revelation.<sup>13</sup>

Since then, the shepherds and the inhabitants of Podhale have come to this holy place, believing that it is a sign of an invisible power, and the spruce standing there has been wrapped in magic. Today the spruce is no longer at the site, but a shrine was placed there commemorating the above-described event.

A story is known of a smerek in Jurgów is known, after which a shrine remains, and the spruce had become a holy tree for the villagers:

Long ago a Jew bought the forest. In the forest there was a tree, and on this tree, there was a little shrine. The people wanted to buy this one tree from the Jewish man, because it was disgraceful to them that a Christian tree should grow in a Jewish forest. Well, they wanted to buy that tree, but he did not want to sell it. The wind came and broke off the top at six meters. Well, alright, this Jew comes in the morning and says: then I will take the top, and I'll leave you the stump. Spring comes, May comes, and the stump starts growing branches. So, God himself chose this place, and God lets this tree grow, and twelve apostles grow out of it! So are these twelve new trunks called, and the thirteenth was a Judas. A tiny one. And you will see it for yourself if you go there, there still are some remains of that stump.<sup>14</sup>

In turn, residents of Zakopane talk about the once revered "holy smrek," to which the power of reversing illnesses and misfortunes was attributed. The last spruce to which the Highlanders prayed for good weather, was reportedly cut down in 1759 in Zakopane by people from Nowy Targ brought by the Jesuit Karol Fabiani.<sup>15</sup>

## The worship of spruce trees in the culture of the Podhale shepherds

The spruce has occupied a special place in the culture of the Podhale shepherds. The spruce chips blessed on Easter Saturday were a symbol and an introduction to all activities performed in the pasture. A fire was started by

13 <http://www.watra.pl/tatry/wiadomosci/2011/07/28/matka-boska-jaworzynska-krolowa-tatr-za-prasza-nas-na-wiktorowki> (access: 26.03.2017).

14 M. Golonka-Czajkowska, M. Maj, *Kapliczki, krzyże i figury przydrożne. Studium sakralizacji przestrzeni*, Bukowina Tatrzańska 2006, p. 96.

15 U. Janicka-Krzywda, K. Ceklarz, *Czary góralskie*, op. cit., pp. 163-164.



the shepherds' huts with fire brought from the church and blessed there. A similar practice applied to the sheep sprinkled with holy water, which also had been brought from the church. The magic rites of the shepherds were closely related to the Catholic faith. All activities performed in the pastures had magical and religious motivations. Although the highlanders of Podhale were Christians, they prayed to God and went to the church, their magical rituals were deeply rooted in their minds and everyday activities. These rituals were designed to protect shepherds against evil spirits and people who conspired with them. The shepherds needed to acquire a whole range of skills, from reading good and bad omens, to telling the time of day and year free from bad spells, to the knowledge of magic formulas and magical gestures. Magic<sup>16</sup> was a crucial sphere of the life of the shepherds, and especially the senior ones. A chief shepherd, called a *baca*, needed to be versatile character, responsible for the skillful use of secret knowledge. He believed it to be a dangerous weapon that used in the wrong way could cause a lot of damage. Therefore, every step in the construction work or other activity was associated with a number of magical treatments. Knowledge of magical rites was a distant and unknown sphere for an ordinary mortal. A senior shepherd would pass on the secret knowledge he had

---

16 The term “magic” is derived from the Persian language, from the word *majim*, which means a “miracle worker,” or “mage.” Etymologists date the origin of this term to around 1000 BC. Magic has many colloquial meanings, as well as many scientific theories. One of the first researchers of magic was James George Frazer, a classical philologist and ethnologist, for whom magic was a system of insights and actions based on the belief that the person performing a magical procedure is able to control the forces of nature, guide them, or force them to obey. Magic became the link between human beings and the supernatural. It allowed mankind to believe in their own strength, eliminating the feeling of helplessness and powerlessness against the incomprehensibility of the world. Incomprehensible phenomena were explained magically, which led to the creation of a whole system of dependencies, e.g. the possibility of summoning, or spelling out a magical power in a certain way and at a certain time. J.G. Frazer adopted two basic laws of magic: like produces like—the effect is similar to the cause, and whatever was in mutual contact, will always remain in a certain relation to each other—for example, a witch does not need an animal itself, it is enough to have an object connected to it to influence it. J.G. Frazer, *Złota galaz*, transl. H. Krzeczkowski, Państwowy Instytut Wydawniczy, Warszawa 1965, p. 56.

These two principles of magic correspond to the principles of associating ideas based on similarity and contact. With time, however, mankind realized that such action to impact the surrounding reality is ineffective. Mankind understood that, apart from the visible world, there are invisible forces that people imagined in an anthropomorphic manner. It is this faith in the mutual dependence of people, supernatural forces and objects that is the essence of magic. According to this principle, man can at least influence nature, which was reflected in the rituals celebrated in Podhale during All Saints' Day and other Church holidays. B. Malinowski, *Szkice z teorii kultury*, transl. H. Buczyńska, H. Stasiak, T. Świąćka, Państwowy Instytut Wydawniczy, Warszawa 1958, p. 449.

gathered only to a one, young shepherd, thanks to which the magic did not lose its power.

The shepherds' faith was strongly bonded with their lives in the pastures. Harsh mountain climate, poor soils, unfavorable natural conditions and the nature surrounding the shepherds led to a gradual anthropomorphizing<sup>17</sup> of the nature and the attribution of a symbolic function to it.<sup>18</sup> Due to the fact that the shepherds were especially surrounded by spruces, they began to attribute exceptional strength and power to them, which ensured their safety and allowed them to order the space that surrounded them. In the area of architecture, the starting point for the construction of the shepherding hut and an outdoor sheep fold (*kosor*) was the choice of the right place to start construction work. It had to be a so-called clean place, namely, not marred by the spilled blood of a human being or an animal. Otherwise the shepherds would be haunted by bad luck. In addition, very often, the huts were put in the shade of a spruce tree, because it was believed that this would always bring good fortune to such a home. In the oral tradition we hear: "In the old times, they would put up a hut next to a *smreka* that was old, and had great and low branches and two trunks. Then, the fortune was good."<sup>19</sup> After selecting the place, they would do to collect spruce wood, as it was considered a suitable material. The *baca* himself would bring the wood, since he was the only one who knew what wood was best suited for this purpose. They never used trees felled by lightning, or those on which someone had hung a shrine. It was believed that these were dedicated to God, and cutting them down was treated as sacrilege. A spruce tree destined for the construction of the hut was always cut down in the spring, after the full moon. The work was started in the time of the full moon, because it was believed that this time would bring the shepherds abundance and prosperity. The construction was not undertaken during Lent, on Fridays or on the 13th of any month, because those days were considered unlucky and could bring a long

17 Anthropomorphization—the word comes from Greek in a combination of two words: *ánthrōpos*—human being and *morph*—shape. The term is defined as a variety of animism, attributing physical characteristics, mental behavior and motives specific to man to objects, natural phenomena, plants, animals, abstract notions, divine beings. *Antropomorfizacja*, in: *Encyklopedia PWN*, <http://encyklopedia.pwn.pl/> (access: 15.12.2016). Zofia Charszewska's short story *Jak góralczyk Kubuś z halnym wiatrem rozmawiał* [How a highlander boy Jack talked to the wind] shows anthropomorphizing of a foehn wind which, although seemingly angry, did not want to hurt people. Z. Charszewska, *Jak góralczyk Kubuś z halnym wiatrem rozmawiał*, "Płomyczek," Iss. 14, 1938.

18 P. Kuleczka, *Regionalistyczne spojrzenie na Tatry i Podhale* in: *Regionalizm – Regiony – Podhale. Materiały z sesji naukowej Zakopane 4-6 grudnia 1993 r.*, ed. J.M. Roszkowski, Publisher Tatra Museum im. Dra Tytusa Chałubińskiego, Zakopane 1995, p. 166.

19 B. Bazińska, *Wierzenia i praktyki magiczne pasterzy*, in: *Pasterstwo Tatr polskich i Podhala*, Vol. 7, ed. W. Antoniewicz, Wrocław–Warszawa–Kraków 1967, p. 160.

streak of misfortune. Before the start of construction, a prayer was said and blessed spruce twigs were inserted in the thatch to protect the shepherds and their belongings. It was believed that the first ax strike on the spruce log had a significant impact on the fate of the hut, the shepherds and their belongings. After placing the first pair of roof beams, a spruce or fir twig was placed in the top, dressed in a red ribbon to protect the hut from evil charms. At the end of the construction work, the chief would incense the hut, its interior and the sheep pen. Incense was used by a *baca* repeatedly throughout the season. The incensing ritual was a magic procedure designed to direct the smoke into a place, on a human or an animal. It was apotropaic, namely, it was aimed at chasing demons away. The huts were also incensed to protect against lightning. The ritual of incensing was connected with a three-time lap, according to the movement of the sun. For this purpose, spruce resin, water from a spring, embers from the fire and herbs blessed on Corpus Christi or on the feast of Our Lady of Assumption [called *Our Lady of the Herbs* in Polish folk culture—transl.] were used. The treatment also was accompanied by uttering certain magic formulas, known only to the shepherd.<sup>20</sup> After incensing the hut, the *baca* went to the sheep pens, where he went around the herd and said a prayer. The treatment of incensing was also associated with women entering the pasture or the *kosor*. According to the highlanders, this brought a great misfortune for their enterprise. Incense helped in dispelling evil hexes. The end of the incensing ritual was associated with burying the campfire lit at the entrance to the sheep fold or at the spot where sheep would be milked, to provide constant care for the shepherds and the sheep. After the most important magical steps connected with building a hut were completed, the hut was cleaned and then a fire called a *watra* was lit in the middle, which would burn from the beginning of the grazing season until the end. The *baca* would mark the spot with sign of the cross using a spruce twig. The fire burning on the hearth was respected and regarded as a living, holy, true being, started naturally from by rubbing wood or striking a flint, without the use of matches. Fire defended the shepherds at night, not only from wild animals, but as it was believed, also from evil spirits. Shepherds could not allow the fire to die, because it was connected with the threat of failure in all spheres of life in the pasture. The *baca* would say a daily prayer to fire for good fortune, asking it to accompany the shepherds until the end of the grazing season.<sup>21</sup>

---

20 U. Janicka-Krzywda, K. Ceklarczyk, *Czary góralskie*, op. cit., p. 120.

21 W. Bachledda-Dorcarz, *Podhalański baca – pasterz, czarownik i protoplasta góralskiego zdobnictwa*, Studia Artystyczne, Iss. 3, Uniwersytet Śląski w Katowicach, Katowice 2015, p. 139.

Spruce wood as having a special power, has found its important place in woodcarving.<sup>22</sup> Magical powers were attributed to other trees as well, such as the ash or maple. The yew also played an important role, for it was another species, along with the spruce, which was used for making the so-called souls, splinters used to be inlaid in tools, which gave an extra protective dimension to the items. Ideally, such a splinter would come from a tree that was struck by lightning. A tool made from such a tree would have contain the holy element. Shepherds very rarely commissioned the village woodcarvers to make tools because they feared bad intentions on their part. They would take care of the production of tools themselves, in the winter, just before Christmas, between one and the other grazing period. The work was associated with chanting formulas, which were intended to help protect the shepherd's possessions against witchcraft. Due to the fact that the tools manufactured by shepherds had direct contact with milk, the entire process of their creation was permanently connected with magic and beliefs. With the development of woodcarving, also ornamentation developed, inspired by the outside world. The most commonly used ornamental motive was the sign of the cross skillfully integrated into a plant or geometric ornament. Very often, it was combined with spruce twigs. The aesthetic value of the work performed was not as important as the whole magical ritual associated with making tools and decorative elements, i.e. reciting magic formulas and various kinds of prayers. Later, the ornamental motifs used on the tools began to be associated with Christian symbolism and often accompany the initials of Christ (IHS) or Our Lady. Spruce twigs arranged in the shape of a cross and used as a decorative element and in many other rituals have become a kind of a totem,<sup>23</sup> not only in the lives of the shepherds, but of the entire population of Podhale. An important element can be the so-called *podłaźniczka*,<sup>24</sup> a Christmas period ornament made of spruce twigs that would be hung under the ceiling

22 Examples of the Podhale woodcarving include the iconic house crossbeams, decorative curtain rods and others. <http://www.ginace-zawody.watra.pl/snycerstwo> (access: 26.03.2017).

23 Totemism is a religious system based on the belief that certain objects, especially plants and animals, considered sacred, become emblems of a given group. The system is based on the worship of a totem, which is an object, plant, or animal. It is particularly widespread in primitive cultures. G. Ritzer, *Klasyczna teoria socjologiczna*, Wydawnictwo Zysk i S-ka, Poznań 2004.

24 The etymology of the word *podłaźniczka* could be both a prepositional phrase: *pod lazem* (old Polish: *near a forest*) or a derivative of the appellative *laz* (*forest*). *Podłaźniczka* and the subsequent Christmas tree are associated with the tradition of the Slavic worship of and evergreen trees. The Slavs believed that placing the branches of these trees in their homes would bring them abundant harvest the next year. Already during the November Day of the Dead, they practiced a custom of putting up the last sheaf of rye reaped in the summer in a corner of the room. The corn from it would be used to start the next year's sowing. In Slavic beliefs trees were conceived as the seat of the gods or represented a model of the universe. The Slavic symbolism of the

or on the door in a hut or cottage Spruce branches were used to decorate not only huts and homes during the Christmas holidays, but also altars on Corpus Christi and the streets of all major celebrations.

In the culture of the shepherds, spruce twigs bore special magic substance, also during the ritual associated with grazing sheep. They served as a talisman, a protection against witchcraft and bringing good luck to its holder. Junior shepherds named *juhas*<sup>25</sup> would pin spruce or fir twigs to their hats, as they would drive their herds during a *redyk*,<sup>26</sup> believing that this would keep them and their sheep were safe. Releasing the sheep into the pasture for the first time was associated with magical procedures that were intended to prepare them properly for possible undesirable action of other shepherds, natural forces or attacks of wild animals. At the exit from the pens, the senior shepherd placed spruce twigs, arranged in the shape of a cross, on the grass. Sheep, walking over it, become partakers of the ritual circle that protected them from evil. Spruce twigs arranged in the shape of the cross were also placed on the cloth used during the first milk straining to prevent its spoiling. In fact, almost all activities associated with the sheep grazing rituals are closely united with the use of spruce, as an element of the sacred, or supernatural. There was a list of dos and don'ts, which could not be broken during a *redyk*. Shepherds were not allowed to break spruce twigs so that they do not break their legs while the sheep were grazing. They had to remember which spruce pole was built into the *kosor* as the first one, so that, if the use of black magic was considered necessary, it could be removed from the earth and stuck back the other side up. Black magic was used by them in the event of suspecting hostile activity of other shepherds.<sup>27</sup> When the sheep found themselves in the pen (*kosor*), a may-pole (*mojka*) was stuck into the ground. It was the top of a spruce or fir tree, around which the flock would be led three times by the *baca*. During this procession, the *baca* would usually say *Our Father* and *The Glory Be*, and also the *Angelus*, this, care was applied in many pastures so that the procedure takes place before noon.<sup>28</sup> In the fall, on the feast of St. Michael, sheep were returned to the village. The return was called an *oschod*. At the

---

*podłaźniczka* was adopted also in Podhale. J. Strzelczyk, *Mity, podania i wierzenia dawnych Słowian*, Rebis, Poznań 2007.

25 *Słownik wyrazów podhalańskich*, in: *Podhale. Tradycja we współczesnej kulturze wsi*, ed. D. Tylkowa, Instytut Archeologii i Etnologii Polskiej Akademii Nauk, Kraków 2000.

26 A parade connected with herding flocks to the mountain pastures in the spring and back to the villages in autumn. *Słownik wyrazów podhalańskich*, op. cit.

27 W. Bachleda-Dorcarz, *Podhalański baca – pasterz*, op. cit., p. 140.

28 This ritual was also visible in the culture of the shepherds in the area of Żywiec.

end of the season, the entire pasture was incensed once again, in thanksgiving for the success of the sheep parade.

## Conclusion

To sum up, the spruce has played a huge role in construction, woodcarving, sheep grazing rituals and in the everyday life of Podhale shepherds. The shepherds' life was filled with magic emblazoned around the spruce. The spruce has become the most important element used in practically every religious or magical ritual to protect sheep, huts and shepherds from danger. The senior shepherd, a *baca*, as the most important person in the pasture, would pass on secret knowledge to younger shepherds, so that each activity was preserved in an order. Nature was understood and respected, and therefore proved to be accommodating and gracious. Giving the spruce a special, magical symbolism meets three important functions: practical, cognitive and psychological. The practical function was associated with the everyday life of shepherds, and so with their health and home-making. The cognitive function allowed them to explain the phenomena and laws governing the world. In turn, the psychological function was the most important one because it gave the shepherds a sense of strength, illusory control over the world, so they did not feel lost and helpless.<sup>29</sup>

Today, the matter of the meaning of the spruce in the life of Podhale shepherds is still an open issue for research. The aforementioned ethnographer, Ewa Kocój, describes some contemporary shepherds' rituals using spruce twigs but she only discusses their practical functions. It is interesting, however, is that the senior shepherd courses organized today are becoming increasingly popular. It is also intriguing because of the culture-related magic rituals. It is certain that once the Tatra mountain pastures, the shepherd's huts, the everyday life of shepherds was shrouded in magic, which has left its mark on Polish literature as well as on the dialect. The time shepherds spent in the pastures was a period of difficult separation from their families, which brought about dreams, longings, and reflections. This has given rise to unique music, poetry and singing. In the space that surrounded the shepherds, a unique spiritual culture was enclosed, which spilled over into the entire Podhale region. It became an inspiration for descriptions of the Podhale nature and the life of shepherds by eminent artists, such as Seweryn Goszczyński, Kazimierz Przerwa-Tetmajer,

---

29 G. Frazer, *Złota gałąź*, op. cit., p. 56.

Stanisław Witkiewicz, Władysław Orkan and contemporary poets, Wanda Szado-Kudasikowa and Roman Dzioboń.

Seweryn Goszczyński, in his *Dziennik z podróży do Tatrów* published in St. Petersburg in 1853, provides a picturesque description of the spring sheep parade:

The full spring is actually only revealed here at the end of May; but it also manifests itself more fully than anywhere else. The vegetation, muffled by the long cold, develops twofold and more luxuriantly; you can hardly keep ahead of its transition from deadness to full life. The whole region goes out at once in its spring holiday costume like a woman from her dressing room; it strikes you harder that you hadn't witnessed her dressing. In those last days of May, the shepherding migration of highlanders begins, and spills from the depths of the Tatra Mountains into the surrounding countryside. This lovely movement adds up to the young life of nature. I had the joy to be a witness to this, and I was looking from a spot which allowed me to catch the most important parts thereof with my eyes. You see ahead, far away, as from the dark depths of the Tatras, darker caravans are approaching, unrecognized yet, slowly drawing nearer one another, becoming clearer and clearer. Greater and greater. Soon they will all be gathered in the valley, flooding its space, moving around it; you start to distinguish people, horses, cattle of all kinds in this crowd, carts loaded with different equipment; after some time the crowd starts to split into different roads, in different directions; each troop is heading for the foothills until all of them disappear in the hundred ravines; but tomorrow you see all the mountains, the forests. The glades populated with flocks; you can hear the bells hanging around the necks of cattle from all sides; you are struck from all sides by the playing of flutes and fiddles; the singing of shepherds is heard from all the peaks, and the wild rocks echo to their hooting.<sup>30</sup>

The spruce has taken an important place in contemporary dialect poetry. Wanda Szado-Kudasikowa, an inhabitant of Nowy Targ, author of seven volumes of poems, is in love with the highlander culture. She was a leader of regional culture groups, and she was active in the Podhalań Association and in the "Drogami Tischnera" Association. In her poem *Smreka*, she describes the spruce:

*Smreka*, household friend, good neighbor next door, be fragrant with your resin, be lovely in your green, get rid of your gloves and warm hat ...

---

30 S. Goszczyński, *Dziennik podróży do Tatrów*, Wydawnictwo Zakład Narodowy im. Ossolińskich, Wrocław 2005.

Mountains, woods and glades will follow you dancing. Already, the whole world is spinning.<sup>31</sup>

Another poem by the same author, *O smrecusiu balladka* (*A little ballad about the little spruce*), again, shows an adoration for the spruce, and an unusual fondness for it. In a fragment below the author emphasizes the connection between the spruce trees, pastures, and the Tatra Mountains. The spruce is treated personally as a literary protagonist:

The little spruce tree mourned being carried to the valley, when he was so jolly up there with his kin ... Come near, my dear! We shall adorn you with straw ornaments, little apples and garlands. We are so happy.<sup>32</sup>

These fragments show the honorable place the spruce has occupied in the Podhale area until this day. It is treated as a home friend, a good neighbor, emanating good energy. Just as the power of the spruce used to be spilled over the Tatra mountain pastures, in shepherd's huts and the highlanders' houses, today it is felt in dialect poetry.

The spruce is also featured in the poems of Roman Dzioboń, a resident of Nowy Targ, author of volumes *Podhale, Ojcowizna* (*Patrimony*), *U świętej Katarzyny* (*At St. Catherine's*), and *Gazdówka w mieście* (*City homestead*). Literary critics considered his volume *Gazdówka w mieście* to be

a visible sign that, in the foggy and damp sinkhole between the two Dunajec riverbeds, in the City, which, stunned by the hustle and bustle of civilization, is slowly losing its roots and memory—the need for emotion, the need to understand and describe the surrounding world with poetic speed is still smoldering, which is the need to save everything that is dear to the heart.<sup>33</sup>

31 W. Szado-Kudasikowa, *Smrek*, <http://www.pinkwart.pl/warsztat/MOK2004/Wanda12.htm> (21.01.2019).

32 W. Szado-Kudasikowa, *O smrecusiu balladka*, in: *Nastol Godni Cas*, Nowy Targ 2014.

33 Z. Szopińska, *Poetycka gazdówka Romana Dziobonia*, "Podhale," 1991, Iss. 5, Nowy Targ.



BIBLIOGRAPHY

- Bachleda-Dorcarz W., *Podhalański baca – pasterz, czarownik i protoplasta góralskiego zdobnictwa*, "Studia Artystyczne," 2015, Iss. 3, pp. 139-144.
- Bazińska B., *Wierzenia i praktyki magiczne pasterzy*, in: *Pasterstwo Tatr polskich i Podhala*, Vol. 7, ed. W. Antoniewicz, Zakład Narodowy im. Ossolińskich, Wrocław–Warszawa–Kraków 1967.
- Charszewska Z., *Jak góralczyk Kubuś z halnym wiatrem rozmawiał*, "Płomyczek," 1938, Iss. 14.
- Dzioboń R., *Baca z Rusnykowej*, in: *Wiersze*, Wydawnictwo i Drukarnia Secesja, Kraków 1997.
- Eliade M., *Traktat o historii religii*, Książka i Wiedza, Warszawa 1966.
- Frazer J.G., *Złota gałąź*, Państwowy Instytut Wydawniczy, Warszawa 1965.
- Golonka-Czajkowska M., Maj M., *Kapliczki, krzyże i figury przydrożne. Studium sakralizacji przestrzeni*, Wydawnictwo Bukowina Tatrzańska, Bukowina Tatrzańska 2006.
- Goszczyński S., *Dziennik podróży do Tatrów*, Wydawnictwo Zakład Narodowy im. Ossolińskich, Wrocław 2005.
- Janicka-Krzywda U., Ceklarz K., *Czary góralskie. Magia Podtatrza i Beskidów Zachodnich*, Wydawnictwo Tatrzańskiego Parku Narodowego, Zakopane 2014.
- Jawor G., *Osady prawa wołoskiego i ich mieszkańcy na Rusi Czerwonej w późnym średniowieczu*, Wydawnictwo Uniwersytetu Marii Curie-Skłodowskiej, Lublin 2004.
- Kaczor I., *Kult drzew w tradycji mitologicznej i religijnej starożytnych Greków i Rzymian*, Wydawnictwo Uniwersytetu Łódzkiego, Łódź 2001.
- Kocój E., *Śladami ostatnich wędrujących pasterzy karpaccich. Raport z wiosennego reddyku rodziny Szczehowiczów (kwiecień 2018)*, "Almanach Nowotarski," Podhalańskie Towarzystwo Przyjaciół Nauk w Nowym Targu, Iss. 22, 2018.
- Kuleczka P., *Regionalistyczne spojrzenie na Tatry i Podhale*, in: *Regionalizm – Regiony – Podhale. Materiały z sesji naukowej Zakopane 4-6 grudnia 1993 r.*, ed. J.M. Roszkowski, Wydawnictwo Muzeum Tatrzańskiego im. Dra Tytuśa Chałubińskiego, Zakopane 1995.
- Malinowski B., *Szkice z teorii kultury*, Książka i Wiedza, Warszawa 1958.
- Mały słownik religioznawczy*, ed. Z. Poniatowski, Wiedza Powszechna, Warszawa 1969.
- Mlekodaj A., *Kwietno Pani. O gwarowej poezji Podhala w ujęciu kulturowym*, Rabka Zdrój 2015.
- Parandowski J., *Mitologia grecka*, Wydawnictwo Puls, Warszawa 1992.
- Ritzer G., *Klasyczna teoria socjologiczna*, Wydawnictwo Zysk i S-ka, Poznań 2004.

- Słownik wyrazów podhalańskich*, in: *Podhale. Tradycja we współczesnej kulturze wsi*, ed. D. Tylkowa, Instytut Archeologii i Etnologii Polskiej Akademii Nauk, Kraków 2000.
- Strzelczyk J., *Mity, podania i wierzenia dawnych Słowian*, Rebis, Poznań 2007.
- Szado-Kudasikowa W., *O smrecusiu balladka*, in: *Nastoł Godni Cas*, Nowy Targ 2014.
- Szceśniak K., *Świerk, drzewo proste*, "Seria Językoznawcza," 2005, Vol. 20 (40), p. 2.
- Szopińska Z., *Poetycka gazdówka Romana Dziobonia*, "Podhale," 1991, Iss. 5.
- Wierzbicka-Olejniczak A., *Nazwy roślin w gwarach kujawskich, maszynopis rozprawy doktorskiej napisanej w Katedrze Dialektologii Polskiej pod kierunkiem prof. dra hab. S. Gogolewskiego*, Łódź 2001.

#### Online sources

- Encyklopedia PWN*, <http://encyklopedia.pwn.pl/>
- Porawska J., *Językowo-kulturowy obraz Wołochów i Wołoszczyzny w języku polskim*, <https://genealogia.okiem.pl/forum/viewtopic.php?f=19&t=22226>.
- Styk J., *Sacrum w kulturze ludowej*, <https://pismofolkowe.pl/artykul/sacrum-w-kulturze-ludowej-2494>
- Szado-Kudasikowa W., *Smrek*, <http://www.pinkwart.pl/warsztat/MOK2004/Wanda12.htm>
- <https://www.pulshr.pl/rekrutacja/kurs-zawodowy-na-bace-i-juhasa-co-cze-ka-kandydatow-na-egzaminie,45618.html>
- <http://www.watra.pl/tatry/wiadomosci/2011/07/28/matka-boska-jaworzynska-krolowa-tatr-zaprasza-nas-na-wiktorowki>
- <http://www.ginace-zawody.watra.pl/snycerstwo>



**Barbara Geneja-Pietrzak**—graduate from MA program in Education at the Jagiellonian University in Krakow, majoring in: Rehabilitation Pedagogy; and from Cultural Studies at the Jesuit University Ignatianum in Krakow, majoring in: Cultural Studies with a specialization in: Cultural management and public relations. Currently, Doctoral student majoring in Cultural Studies at the Jesuit University Ignatianum in Krakow. Writing a Doctoral Dissertation on the religiousness of young Podhalans in the context of contemporality. The subject matter is close to her because of her roots in the Podhale region, but also because of her love of culture and especially issues related to human religiousness. Her scientific interests are related to the cultural issues of Podhale such as: the roots of Podhale religiousness, social folklorization; and pedagogical problems: upbringing to freedom, social stigmatization and its social consequences, and the image of female killers in the eyes of social rehabilitation students.

**Małgorzata Lebda**

ORCID: 0000-0003-4286-1450

Pedagogical University of Krakow

malgorzata.lebda@up.krakow.pl

DOI: 10.35765/pk.2019.2704.15

## Seeing as Action. The Methods of Interpreting Visual Materials on the Example of Photography

### ABSTRACT

The article asks about the power of photography. Four photographs are referred to. The author tries to describe ways of looking, analyzing and interpreting each of them. Every time, it is a subjective analysis based on individual visual competences. The concept of *punctum* turns out to be important, as it allows a closer look at the visual. Ultimately, the answer to the question whether in the analysis of an image we take possession of it, or is it the other way around, is solved at the level of individual reception of a particular photo.

**KEY WORDS:** photography, visual art, ways of seeing, punctum, study, visual competence

### STRESZCZENIE

*Widzenie jako działanie. O sposobach interpretacji materiałów wizualnych na przykładzie fotografii*

Artykuł traktuje o sile fotografii. Omówiono cztery fotografie, na których przykładzie autor próbuje opisać sposoby patrzenia, analizowania i interpretowania. Każdorazowo jest to subiektywna analiza oparta na indywidualnych kompetencjach wizualnych. Pojęcie *punctum* okazuje się ważne, ponieważ pozwala przyjrzeć się temu, co wizualne. Ostatecznie odpowiedź na pytanie, czy w analizie panujemy nad

obrazem, czy obraz nad nami, jest każdorazowo rozpatrywana przy indywidualnym odbiorze konkretnego zdjęcia.

SŁOWA KLUCZE: fotografia, sztuka wizualna, sposoby widzenia, *punctum*, studium, kompetencje wizualne

November 2011, the interior of one of the Amsterdam galleries is filled with photographs. Printed, tangible, forming a tactile and visual installation at the same time. It is 350,000 photographs. The name of the exhibition is *24 Hrs in Photos*, the originator Erik Kessels, is a Dutch artist who has been carefully watching what is visual for over twenty-five years.<sup>1</sup> Photographs were downloaded from the Flickr website—*punctum* 350,000, as so much was uploaded by portal users within twenty-four hours. Impressive and stunning. However, this should not surprise us, if we recall the data according to Nicholas Mirzoeff: within a minute, 100 hours of recordings are uploaded on YouTube, Americans take more photos in two minutes than all together throughout the nineteenth century, and a billion photos were taken in 2014.<sup>2</sup> This is data from a few years ago. This gesture of giving a physical form to the images uploaded on the Internet was intended to show—tangibly—the scale of the phenomenon. However, not only that. At this point, it is worth recalling the considerations of Marek Krajewski, who, speaking of the physicality of photographic images, pointed out that this aspect allows taking a new look at what is visual and how the physical image affects the recipient, what it means to them.<sup>3</sup> Visitors walk between printed paintings and feel the physical resistance thereof. They feel *subjectile* as Jacques Derrida said about the materiality of an image.<sup>4</sup> The viewer, actively looking, becomes an element of the installation, and their gesture of raising the photo and looking at it, becomes a replacement for scrolling the website on the screen. And just like

1 Manages the Kessels Kramer advertising agency, famous for unusual (often provocative) solutions: <http://www.kesselskramer.com/> (access: 20.12.2018)

2 Cf. N. Mirzoeff, *Jak zobaczyć świat*, transl. Ł. Zaręba, Kraków–Warszawa 2016, p. 20.

3 Cf. “Noticing objects in photos means that they can be analyzed in a different way than the usual practice. At the center, first of all there is a question what the photos mean to individuals, not what they depict and how they depict it. Its significance is primarily due to the fact that by asking it we place photography in the context of other social practices, and a photo within the material context of our life. Thus, answering them not only avoids the unnecessary exoticization of what is visual, because it roots them in a world of common experience, but also allows using the tools created for the purposes of analyzing other material representations as a means of studying photographs,” M. Krajewski, *Fotografie jako przedmioty*, [https://www.academia.edu/1978609/\\_Fotografie\\_jako\\_przedmioty](https://www.academia.edu/1978609/_Fotografie_jako_przedmioty) (access: 20.12.2018).

4 Cf. J. Derrida, P. Theverin, *Antonin Artaud. Dessins et portraits*, Paris 1986, p. 53.

there, also inside the building it is impossible to see all the photographs. The act of seeing, sight—or as Mirzoeff would define it—action,<sup>5</sup> has a tangible importance here. This visual performance prompts reflection on how we look at the photographic image. Does it still make sense to ask questions as W.J.T. Mitchell “what do paintings want?”<sup>6</sup> Among the answers formulated by the researcher, the slightly metaphorical one (based on *The Wife of Bath’s Tale* by Chaucer) telling about the desire to control the image over the viewer seems to be significant.<sup>7</sup> Images want it, as well as *maistrye*.<sup>8</sup> A space opens up here to think about how we treat images, do we let them control ourselves, who ultimately controls whom: do we control the image or the image controls us? Hence the following questions about: life of images, protest of images, subversiveness of what is visual and our place—of the viewers—in all this. To illustrate such a broad context, subjectively selected visual material will be used, in which the Barthesian *punctum* is visible, i.e. something that does not allow one to be indifferent to a particular photograph. And here, at the stage of choosing a photograph, it turns out that it was made under the influence of a gesture that could not be defined otherwise than by Barthesian term *punctum*—a gesture of mastering the imagination of the viewer through the image. At this point, the image is already in control of the viewer. This *punctum*, which is like a prick, a wound, is “the case that in this photo is *aimed* at me (but it also strikes, oppresses me).”<sup>9</sup> Below are three approaches at four different photographs, each of which has a “sharp point” that catches the eye. Where will the reader of this text find *punctum* in these images? Is the realization of *punctum* the first step to possessing the image or being possessed by it?

## The first sight

*Full Moon, An Unidentified Object in the Sky, Taking a Selfie*. These are the terms most often mentioned by students when asked about what they see in the photograph of John Stanmeyer. They have enough time for analysis so that—after these first clues—doubts arise. *There are People in the*

---

5 Cf. N. Mirzoeff, *Jak zobaczyć świat*, op. cit., p. 6.

6 W.J.T. Mitchell, *Czego chcą obrazy*, in: *Antropologia kultury wizualnej*, eds. I. Kurz, O. Kwiatkowska, Ł. Zaręba, Warszawa 2012, pp. 185-189.

7 Ibidem, p. 188.

8 “... a complex term of Middle English, comprised within the rule, resulting from law or consent, and authority based on superiority or cunningness,” ibidem.

9 R. Barthes, *Światło obrazu*, Warszawa 1996, p. 161.

*Landscape*, a fragment of the poem by Tomas Tranströmer is recalled.<sup>10</sup> There are many disturbing things here: night, sea, male silhouettes, tension and anticipation. In front of us there is the shoot of an American photographer who was awarded in the 75th edition of World Press Photo (2013). The photo shows African immigrants on the Djibouti coast who is trying to connect to a cheaper mobile network from neighboring Somalia. It is the only way to talk to their families.

Photo 1



Source: <https://www.worldpressphoto.org/collection/photo/2014/contemporary-issues/john-stanmeyer>.

This photograph, deprived of context, reveals as much about itself as we already know visually. Here Stanmeyer provokes to ask a specific question: about the strength of this image, its potential power of change, reconfiguration in thinking about—for example—the refugee crisis. Of course, this somewhat poetic and, in fact, ambiguous, metaphorical frame does not seem to be the best choice if we want to talk about a “Protest of Images.” But that is why it is worth taking a closer look at it, because it raises questions, it does not play with the brutality of the performance.<sup>11</sup> It is not

<sup>10</sup> T. Tranströmer, *Wiersze i proza 1954-2004*, transl. M. Wasilewska-Chmura, L. Neuger, Kraków 2017.

<sup>11</sup> How else would this interpretation look if the subject of reflection was the photograph of Burhan Ozbilici depicting the assassin of the Russian ambassador in the gallery building in Ankara?

a “photo-shock”<sup>12</sup> as Roland Barthes wrote about the photographs exhibited in the Gallery D’Orsay. There is an ambiguity in which tension and anxiety can be noticed. The author of the photographs managed—once again, as if to confirm Barthes’s diagnoses—to cause horror without literality, because, as the French semiologist argues: “Literal photography introduces the horror scandal, not the horror itself.”<sup>13</sup> The people photographed in the Gulf of Aden create a metaphorical image that leaves the viewer with interpretive space. It is an image that even without context seems to work through its poetry and something close to it seems to be the concept of Gottfried Boehm namely “iconic density” which

... is (from the point of view of verbal language) what is the emptiest in the image: a non-figure, i.e. A simultaneous form of relationship between the figures, between the figure and the composition, between the figure and the color scheme, etc. In the uncertainty of the contrast between the boundaries is comprised both irreplaceable sensuality and this “logic” of correspondence, which form the phenomenal *datum* of a specific image. We are dealing here with a paradox that indeterminacy is precisely what is visibly the most concentrated, in which the vividness of an image becomes most distinctly itself, i.e. a phenomenon.<sup>14</sup>

The first contact with this image was undoubtedly associated with thinking about its intensity. What it wants from a viewer? Mindfulness. This is not a simple photojournalistic message, it is an image built on poetic tensions, in which the most important seems: an understatement, metaphoricality, a symbol. There is also that: a non-place.<sup>15</sup> We are dealing here with a place that is not anchored in history and memory, a transitional, transit, anonymous place, which is only a point of transition, a short stop in an uncertain journey. This is a non-place where the actors of this visual scene are located, it additionally builds a feeling of uncertainty, because if in this picture we are not even anchored by space (it is nameless, raw, inaccessible), it makes the visual representation secret. It is worth looking at it through the neuroesthetic prism of “Eight laws of artistic experience,” formulated by Vilayanur S. Ramachandran and William Hirstein, who propose an analysis of visual materials based on their principles.<sup>16</sup> According

---

12 Cf. R. Barthes, *Mitologie*, Warszawa 2008, p. 139-141.

13 Ibidem, p. 141.

14 G. Boehm, *O obrazach i widzeniu*, Kraków 2014, p. 164.

15 Cf. M. Augé, *Nie-Miejsca: wprowadzenie do antropologii nadnowoczesności: fragment*, “Teksty Drugie: teoria literatury, krytyka, interpretacja,” No. 4 (112), 2008, pp. 127-140.

16 These include: (1) the principle of peak shift (2) the principle of isolation of a single visual indicator, (3) the principle of perceptual grouping, (4) the principle of contrast extraction, (5) the

to researchers, if a visual work meets any of these principles, then—simplifying—it guarantees that the recipient shall experience it more deeply, remember it for long. And so, it is in this case, the photo mentioned clearly refers to several of the rules indicated above. It uses the most the “principle of using visual metaphors,” which is based on the belief that “... an object discovered with effort brings more pleasure than the one that is just given. The reason for this is unclear, but a mechanism of a similar nature convinces that just struggling with difficulties *only* is profitable.”<sup>17</sup> This photography requires mindfulness, it is a kind of visual jigsaw, which, however, without context seems to be only a well-constructed frame. In context, however, this image works quite differently, suddenly all the elements begin to mean something: the light of the phone becomes a metaphor of contact and longing, the moonlight reflected on the surface of the water turns into a sinister void of the night. Along with the exposed context, this image begins to belong to politics, becomes an image in action, then—to use Mitchell’s term—the catalyst image.<sup>18</sup> And *punctum*: a man in the bottom right corner who seems to be staring at the water surface.

## The second sight

Multiplication. Hands raised high. From the blurred background, we can bring out the outlines of a woman with the most mysterious smile in the world. This is clearer if we focus our eyes on the devices that are here to

---

principle of challenging perception, (6) the principle of avoiding atypical points of view, (7) the principle of using visual metaphors, (8) the principle of usability and attractiveness of symmetry. Cf. V.S. Ramachandran, W. Hirstein, *Nauka wobec zagadnienia sztuki*, in: *Studia z kognitywistyki filozofii umysłu*, Poznań 2006, Zysk i S-ka, pp. 361-362.

17 Ibidem, p. 355.

18 “Images have power, but it is not a physical force based on a constant cause-effect relationship with people or things. A person or a thing must be sensitive to the power of the image in some way. If we were to rely on the physico-chemical model of strength, to understand it as ‘the ability to introduce change’, I would propose a meta-image in the form of a catalyst. In chemistry, the name refers to a substance that appears to facilitate the reaction, although it remains unchanged. In other words: as a factor in catalysis, an image can accelerate something that is already happening, but cannot itself be the cause of what is happening. Like the catalyst, the image is indifferent, but its presence can accelerate the process, which would take place much more slowly. It is sometimes said that reporters’ photos revealing the horror of the Vietnam War brought it to an end. I deeply doubt the truth of this statement. Photographs were effective, helped to mobilize political passion and resistance. However, the photos alone did not cause anything. They served as catalysts for things that were already happening.” Cf. W.J.T. Mitchell, *Kwestionariusz: Protest obrazów*, transl. P. Mościcki, “Widok. Teorie i praktyki kultury wizualnej,” 2017, No. 17, <http://pismowidok.org/index.php/one/article/view/515/973> (access: 20.12.2018).



stop the image, visually repeat what is already visually stopped. Martin Parr, the author of the above-mentioned photography, has been interested for years in how the individual functions in society, his works show—often zoomed—the faces of the nouveau riche social layer.

Photo 2



Source: <https://pro.magnumphotos.com/CS.aspx?VP3=SearchResult&VBID=2K1HZO4R2ORIQ2>.

Almost every time, it is a critical, ironic look. Let us look again at *Mona Lisa*, who, like Leonardo da Vinci's other work, has become "an element of tourist marketing."<sup>19</sup> Parr makes an interesting act here by blurring the famous portrait. His lens is focused on the behavior of tourists—hands in action. There is a pop-culture multiplication of the image, something that Maria Poprzędzka discussed in relation to the most famous Louvre work, and which is associated with overrepresentation of this image in mass culture. "This unfortunate picture is lost to culture" she said. It has already been completely annihilated by all these pop-cultural uses and abuses. It is actually gone."<sup>20</sup> Significantly, photography shows how man creates new simulacra, introduces phantom images into reality, characters that will resemble the original image, but will never be the same. John Urry said that

---

19 M. Poprzęcka, *Patrzą!*, Gdańsk–Warszawa 2015, p. 111.

20 Zob. *Mona Lisa już nie istnieje*, Polskie Radio, Dwójka, <https://www.polskieradio.pl/8/402/Artykul/479338,Mona-Lisa-juz-nie-istnieje> (access: 20.12.2018).

“A tourist’s look includes signs, and tourism is about collecting signs.”<sup>21</sup> The photographer himself also takes part in this collection of signs, by photographing people who take photographs. The gesture of directing the camera’s focus to the devices makes the original image become a blurred image, it exists for us in multiplied views, similar but yet only a copy. This is an image about a subversive message, which, according to Grzegorz Dziamski,

consists in imitating, identifying with the object of criticism, and then gently shifting meanings. This moment of shifting meanings is not always visible to the viewer. This is not a straightforward, direct criticism, but a criticism full of ambiguity, referring to a secret agreement with the viewer, who must follow the author’s thought, and very often construct the critical meaning of the work.<sup>22</sup>

The viewer’s sight is separated here from the original image through the image recording devices, they see and freeze the image as it will be visible to the recipient. It seems that seeing as action is limited here. The photographer joins this subversive game. He is standing further from the original than the photographers, standing tightly in front of him. Taking a photograph of people taking photographs, he emphasizes the subversive nature of this moment. And *punctum*: a ring on the palm of the left hand of one of the photographed women.

### The third sight

Vivian. Whoever has seen at least one of Vivian Maier’s photographic self-portraits will easily recognize the artist in the reproduction here. The story of her perception of the world is unusual, it turns out that she did not develop her photos at all, which happened upon her death. It is possible that because of the awareness of the fact that the frames deliberately set by her will remain out of her sight, maybe that’s why she photographed her reflection somewhat obsessively.

---

21 J. Urry, *Spojrzenie turysty*, Warszawa 2007, p. 17.

22 G. Dziamski in a conversation: *Wartością sztuki krytycznej jest to, że wywołuje dyskusje i prowokuje do rozmów o wartościach*, “Gazeta Malarzy i Poetów,” No. 2-3, 2001, [http://witryna.czaso-pism.pl/gazeta/artukul.php?id\\_artykulu=56](http://witryna.czaso-pism.pl/gazeta/artukul.php?id_artykulu=56) (access: 20.12.2018).

Photo 3



Source: <http://cdn.vivianmaier.com/wp-content/uploads/2013/10/VM1979K05841-07-MC.jpg>

Capturing oneself in reflections (mirrors, windows, puddles) is—as it seems—a substitute for physical photography, a preview of what will be reproduced on photosensitive material. And once again we are dealing with reproduction. This time, the self-portrait has two dimensions: a blurred outline stuck on the glass shop window and a clearer figure on which the focus is reflected in the mirror hung inside the room. This complicated frame required the photographer to be mindful, one would like to say as John Berger that conscious gazing takes place here, which is an act of choice and more:

We never look at just one thing. We always look at the relationship between things and ourselves. Our seeing is characterized by constant activity, constant mobility, constant inclusion in the circle of things around it, which it covers, the constitution of what is our reality at this moment.<sup>23</sup>

And this shot, this self-portrait, discusses the classic understanding of this genre, in which, as Philippe Lejeune believed, the self-presentation of man is important, not the world.<sup>24</sup> The obsessive gesture of photographing

---

23 J. Berger, *Sposoby widzenia*, transl. M. Bryl, Warszawa 2008, pp. 8-9.

24 Cf. “So I see the self-portrait as a special situation, a little ambiguous, which allows a violent disruption inside a very specific genre, which is a portrait, by some spark that can only shine in the mind of the beholder. This allows to see the essence of art in a dizzying look: being

seems to be the artist's way of "stopping life," although paradoxically the thought of photography, the act of immortalizing a moment from here and now, evokes the concepts of time, transience, and death. We remember the photo by Alexander Gardner *The portrait of Lewis Payne* recalled by Roland Barthes, dated 1865, which shows a young man waiting to be hanged (as punishment for an attempted murder of the US Secretary of State W.H. Seward). It is here that the French semiologist diagnoses: "The photo tells me about death in the future."<sup>25</sup> And to complete, the necessary fragment from André Bazin: "Death is only a victory of time. To capture the physical appearance of a human being artificially—that is, tear it away from the river of transience and load it onto the ship of life."<sup>26</sup> Maier's gesture was, in fact, incomplete, there was no physical realization, it remained implicit, never seen by her. Photographing in her case ended with choosing a frame and pressing the shutter button. The life story of the American artist ends in insanity and loneliness. Looking at her legacy, it seems that Susan Sontag made the diagnosis associated with her:

The increasingly complex sense of reality creates its own compensatory elation and simplification, of which taking photos is particularly addictive. It is as if photographers, responding to a fading sense of reality, were looking for a transfusion—a journey for new experiences, refreshing past sensations. Their ubiquitous actions mean the most radical and safest version of mobility. The desire for new sensations translates into the desire to take photos: experience seeking a form resistant to the crisis.<sup>27</sup>

From the film *Looking for Vivian Maier* we learn that she was: "full of paradoxes," and defined as: "bold," "mysterious," "eccentric," "secretive," "crazy," "introverted," "seemed unusual." Through the camera, she reduced the distance, and appeared in the role of the one who is looking, and this was associated with a sense of control over the situation, imposing certain rules. This is a gesture of taming and appropriating reality. The film referred to herein uses fragments of a video recording in which she asks her pupils (we know she worked as a nanny) a question: "Say how can one live forever?" She found the way herself. Her vision was an action or counteraction against the passing time. To live forever is—however romantic

---

a self-presentation of a man (not a representation of the world), the self-portrait becomes an allegory of art itself," B. Czubak, *Egocentryczne, niemoralne, przestarzałe. Współczesne wizerunki artystów*, Warszawa 2005, p. 3.

25 R. Barthes, *Światło obrazu*, op. cit., p. 161.

26 A. Bazin, *Ontologia obrazu fotograficznego*, in: *Antropologia kultury wizualnej*, op. cit., p. 224.

27 S. Sontag, *O fotografii*, transl. S. Magala, Kraków 2009, p. 171.

it sounds—to be in a photograph. I *punctum*: arrangement of the artist's hand is visible in both reflection and in the mirror.

## The fourth sight

... I dug out, from under the ground / from a pile of other photos, hell: salgado / and this hell brought gold to me in ultraviolet and infrared / in the Sierra Pelada and in photographs // my eye went crazy, it took more photos of salgado photographs / photos along and across photos around / photos more and more new ones appeared.<sup>28</sup>

This is what Agnieszka Mirahina wrote in the poem *Polaroid's Curse* [Przekleństwo polaroida]. The poet's sight works in this poem, expressing in speech the powerful power of photography by Sebastião Salgado. These almost apocalyptic shots depicting hundreds of people in close formation. Human anthill. The photographer arrived at the gold mine in Serra Pelada. It was the place where gold was found in 1979, the nugget weighed 6 grams and it was enough to unleash a gold rush. Within a few weeks thousands of people came there who worked in slave conditions, using only their own muscles. Over time, this place became a hell on earth, in which even murders occurred due to misunderstandings. Salgado came there as a viewer, unaffected by the gold rush, and carefully photographed the Cassandrian frames. Looking at the image referred to here, one gets the impression that human work is perfectly arranged there and follows the rhythm imposed from above. Human bodies merge into one working mass. Black and white also average the performance, in black and white the contours of the bodies can be seen more clearly, the picture gains dynamics.

What does this image do with the viewer? Does it hypnotize them? Does it keep them close? Does it possess them? It seems, apparently, all of it. Here—as it often happens with difficult photos—appears a thought that (referring to Anka Herbut's description),<sup>29</sup> “one does not know how to look.” One can try to separate the aesthetic values of photography from the content, but this is a difficult procedure, in this case perhaps impossible. The frame is built on tensions in shades, although only using black and white, between these color poles, the photographer managed to bring out the color dynamics: from black through gradations of grey to white, extracted with light. Tensions are brought about by the subject immortalized

---

28 A. Mirahina, *Radiowidmo*, Wrocław 2009, p. 23.

29 A. Herbut, *Nie wiadomo jak patrzeć*, “Dwutygodnik,” <https://www.dwutygodnik.com/artukul/5642-nie-wiadomo-jak-patrzec.html> (access: 20.12.2018).

here, human bodies in a hurry, as if in a fever, temporary ladders, soil falling and falling under the feet. Madness, insanity that can also affect the viewer:

... I already had a whole armful of films / I folded them into trumpets and stuffed them in the corners // and as soon as I was managed to insert the film / ready prints appeared! // and anything I looked at changed into a photo / which faded with the dawn,<sup>30</sup>

Mirahina continues in her poem. And punctum: a man in the center, as if frozen on a ladder.

#### Photo 4



Source: <https://i2.wp.com/huxleyparlour.com/app/uploads/2018/03/BHC0513.jpg?w=760&ssl=1>.

What does this image do with the viewer? Does it hypnotize them? Does it keep them close? Does it possess them? It seems, apparently, all of it. Here—as it often happens with difficult photos—appears a thought that (referring to Anka Herbut’s description),<sup>31</sup> “one does not know how to look.” One can try to separate the aesthetic values of photography from

30 A. Mirahina, *Radiowidmo*, op. cit.

31 A. Herbut, *Nie wiadomo jak patrzeć*, “Dwutygodnik,” <https://www.dwutygodnik.com/artukul/5642-nie-wiadomo-jak-patrzec.html> (access: 20.12.2018).

the content, but this is a difficult procedure, in this case perhaps impossible. The frame is built on tensions in shades, although only using black and white, between these color poles, the photographer managed to bring out the color dynamics: from black through gradations of grey to white, extracted with light. Tensions are brought about by the subject immortalized here, human bodies in a hurry, as if in a fever, temporary ladders, soil falling and falling under the feet. Madness, insanity that can also affect the viewer:

... I already had a whole armful of films / I folded them into trumpets and stuffed them in the corners // and as soon as I was managed to insert the film / ready prints appeared! // and anything I looked at changed into a photo / which faded with the dawn,<sup>32</sup>

Mirahina continues in her poem. And punctum: a man in the center, as if frozen on a ladder.

## Possession

The images cited above differ a lot, from the technical details, through themes, ending—maybe somewhat metaphorically—with the strength of the impact. These few looks showed that each time the approach to the image and our being with it, takes place depending on our approach to the given photograph. We are talking here about cultural and visual competences that dictate how we treat what we see. The images seem to take possession of us, if the viewer is ready to open up to the *punctum* of visual communication. The life of images, the protest of images, are realized in the way we use, duplicate, recall, process them. Seeing as an action is possible, but only when we consciously want to let it happen. Finally, a question—have you ever photographed your own feet? Leipzig 2014, Erik Kessels shows the installation “My Feet.” These are images of over 2.5 thousand feet photographed by Internet users. What photographs are uploaded into the virtual space tells us how we see and what is important to us. The projects done by Kessel track what is strange, not obvious, something that seems to be marginal, but still has its visual representation. Let us take a look at what we photograph ourselves, why we photograph it and what has the image in the frame has to do with it? And when it comes to the possession of the viewer by an image, it seems that this power is given away /or not, based on negotiations between the viewer and the image.

---

32 A. Mirahina, *Radiowidmo*, op. cit.

Each time it is a process, arranging with a visual representation, surrendering to it, maybe even like the poet referred to, dreaming:

... and the photos were like silent vampires like an old / old joke // finally I was exhausted, the film broke off // time stood still and nothing changed // kilometers fly past, film out of the windows, the projector noise increases / I still can't sleep and close my eyes to burst and fall into butterflies / like confetti.<sup>33</sup>

### Bibliography

- Augé M., *Nie-Miejsca: wprowadzenie do antropologii nadnowoczesności: fragment*, "Teksty Drugie: teoria literatury, krytyka, interpretacja," Iss. 4 (112), 2008.
- Barthes R., *Mitologie*, Warszawa 2008.
- Barthes R., *Światło obrazu*, Warszawa 1996.
- Bazin A., *Ontologia obrazu fotograficznego*, in: *Antropologia kultury wizualnej*, eds. I. Kurz, O. Kwiatkowska, Ł. Zaręba, Warszawa 2012.
- Berger J., *Sposoby widzenia*, transl. M. Bryl, Warszawa 2008.
- Boehm G., *O obrazach i widzeniu*, Kraków 2014.
- Czubak B., *Egocentryczne, niemoralne, przestarzałe. Współczesne wizerunki artystów*, Warszawa 2005.
- Derrida J., Theverin P., *Antonin Artaud. Dessins et portraits*, Paris 1986.
- Mirahina A., *Radiowidmo*, Wrocław 2009.
- Mirzoeff N., *Jak zobaczyć świat*, transl. Ł. Zaręba, Kraków–Warszawa 2016.
- Mitchell W.J.T., *Czego chcą obrazy*, in: *Antropologia kultury wizualnej*, eds. I. Kurz, O. Kwiatkowska, Ł. Zaręba, Warszawa 2012.
- Poprzęcka M., *Patrz!*, Gdańsk–Warszawa 2015.
- Ramachandran V. S., Hirstein W., *Nauka wobec zagadnienia sztuki*, in: *Studia z kognitywistyki filozofii umysłu*, Poznań 2006.
- Sontag S., *O fotografii*, transl. S. Magala, Kraków 2009.
- Tranströmer T., *Wiersze i proza 1954-2004*, transl. M. Wasilewska-Chmura, L. Neuger, Kraków 2017.
- Urry J., *Spojrzenie turysty*, Warszawa 2007.

### Netography

- Herbut A., *Nie wiadomo jak patrzeć*, "Dwutygodnik," <https://www.dwutygodnik.com/artukul/5642-nie-wiadomo-jak-patrzec.html> (access: 20.12.2018).

<sup>33</sup> Ibidem.



Interview with Grzegorz Dziamski, *Wartością sztuki krytycznej jest to, że wywołuje dyskusje i prowokuje do rozmów o wartościach*, “Gazeta Malarzy i Poetów”, Iss. 2-3, 2001, [http://witryna.czasopism.pl/gazeta/artukul.php?id\\_artykulu=56](http://witryna.czasopism.pl/gazeta/artukul.php?id_artykulu=56) (access: 20.12.2018).

Krajewski M., *Fotografie jako przedmioty*, [https://www.academia.edu/1978609/\\_Fotografie\\_jako\\_przedmioty](https://www.academia.edu/1978609/_Fotografie_jako_przedmioty) (access: 20.12.2018).

Mitchell W.J.T., *Kwestionariusz: Protest obrazów*, transl. P. Mościcki, “Widok. Teorie i praktyki kultury wizualnej”, 2017, Iss. 17, <http://pismowidok.org/index.php/one/article/view/515/973> (access: 20.12.2018).

*Mona Lisa już nie istnieje*, Polskie Radio, Dwójka, <https://www.polskieradio.pl/8/402/Artykul/479338,Mona-Lisa-juz-nie-istnieje> (access: 20.12.2018).



**Małgorzata Lebda**—born in 1985, Doctor of Humanities (specializing in theory of literature and audiovisual arts), academic teacher associated with the Institute of Information Sciences of the Pedagogical University in Krakow. Scientifically interested in visual arts, neuroesthetics, and information visualization. Poet (winner of the Gdynia Literary Prize for 2019 in the Poetry category). Ultramarathon runner. Lives in Krakow.



Łukasz Burkiewicz

ORCID: 0000-0001-9115-0837

Akademia Ignatianum w Krakowie

lukasz.burkiewicz@ignatianum.edu.pl

DOI: 10.35765/pk.2019.2704.16

---

Sprawozdanie z konferencji  
naukowej pt. *Cmentarz –  
dziedzictwo materialne i duchowe*  
zorganizowanej przez Instytut  
Kulturoznawstwa Uniwersytetu  
Marii Curie-Skłodowskiej  
w Lublinie oraz Stowarzyszenie  
„Studnia Pamięci” z Lublina  
(21-22 października 2019 r.)

---

W dniach 21-22 października 2019 r. w salach Wydziału Humanistycznego Uniwersytetu Marii Curie-Skłodowskiej w Lublinie odbyła się konferencja naukowa pod hasłem *Cmentarz – dziedzictwo materialne i duchowe*, zorganizowana przez pracowników tamtejszego Instytutu Kulturoznawstwa oraz Stowarzyszenie „Studnia Pamięci”. W trakcie konferencji rezultaty swoich badań przedstawiło 40 badaczy różnych specjalności: archeologów, historyków, historyków sztuki, antropologów, etnologów, kulturoznawców, filologów, filozofów, teologów, religioznawców, socjologów, pedagogów, przedstawiciele innych nauk, a także pasjonatów historii lokalnej oraz praktyków zaangażowanych w działalność na rzecz ochrony cmentarnego

**Sugerowanie cytowanie:** Burkiewicz, Ł. (2019). Sprawozdanie z konferencji naukowej pt. *Cmentarz – dziedzictwo materialne i duchowe* zorganizowanej przez Instytut Kulturoznawstwa Uniwersytetu Marii Curie-Skłodowskiej w Lublinie oraz Stowarzyszenie „Studnia Pamięci” z Lublina (21-22 października 2019 r.). *Perspektywy Kultury*, 4(27), ss. 235-245.

dziedzictwa. Reprezentowali oni szerokie środowisko akademickie: Uniwersytet Marii Curie-Skłodowskiej w Lublinie, Uniwersytet Jagielloński, Akademię Ignatianum w Krakowie, Uniwersytet Kardynała Stefana Wyszyńskiego w Warszawie, Uniwersytet Łódzki, Uniwersytet Warszawski, Uniwersytet Rzeszowski, Uniwersytet im. Adama Mickiewicza w Poznaniu, Akademię Sztuk Pięknych w Warszawie, Uniwersytet Pedagogiczny im. KEN w Krakowie, SWPS Uniwersytet Humanistyczno-Społeczny, Uniwersytet Szczeciński, Uniwersytet w Białymstoku i Katolicki Uniwersytet Lubelski Jana Pawła II w Lublinie. Ponadto dwie osoby reprezentowały zagraniczne ośrodki naukowe: Uniwersytet Nawarry w Pampelunie oraz Uniwersytet w Hildesheim. Wśród prelegentów znajdowali się również pracownicy naukowcy i merytoryczni takich instytucji jak: Biblioteka Publiczna w Dzielnicy Wawer m.st. Warszawy, Muzeum Archeologiczno-Historyczne w Stargardzie, Stowarzyszenie „Crux Galiciae”, Stowarzyszenie „Studnia Pamięci”, Komisja Rabiniczna ds. Cmentarzy, Fundacja Zapomniane, Towarzystwo Przyjaciół Nauk w Przemyśle, Pracownia Architektury Krajobrazu Muzeum Wsi Radomskiej w Radomiu oraz Muzeum im. Jacka Malczewskiego w Radomiu.

Konferencję otworzył Dziekan Wydziału Humanistycznego UMCS prof. dr hab. Robert Litwiński, który uroczystie powitał wszystkich przybyłych uczestników oraz podkreślił znaczenie i rolę instytucji cmentarza w szeroko rozumianej kulturze. Jako kolejna głos zabrała dr Teresa Klimowicz z Instytutu Kulturoznawstwa UMCS. W części powitalnej konferencji zostały również umieszczone dwa interesujące wykłady: pierwszy autorstwa przewodniczącego komitetu organizacyjnego konferencji prof. dr hab. Jana Adamowskiego (UMCS) zatytułowany *Cmentarz jako całościowy znak kulturowy (morfologia i semantyka)* oraz drugi wygłoszony przez prof. dr hab. Jacka Kolbuszewskiego (UWr) pt. *Cmentarz jako przedmiot badań antropotanologii humanistycznej*.

Obrady w ramach konferencji, z uwagi na dużą liczbę zgłoszonych referatów, zostały zorganizowane w dwóch odrębnych salach; łącznie uczestnicy konferencji mogli wysłuchać dziesięciu paneli o różnorodnej tematyce.

Po uroczystym otwarciu prowadzący przedpołudniowe obrady w panelu nr 1 (sala obrad Wydziału Humanistycznego UMCS) zatytułowanym *Stan i perspektywa badań*, dr hab. Andrzej Trzciniński (UMCS), oddał głos pierwszemu referentowi, dr hab. Leszkowi Hońdo (UJ), który w otwierającym sesję wystąpieniu pt. *Cmentarze żydowskie w Polsce. Najnowsze badania. Perspektywy badawcze* omówił trzydziestoletnią perspektywę badawczą nad cmentarzami żydowskimi. W swoim wystąpieniu potwierdził, że polskie badania nad cmentarzami żydowskimi bazują na dobrze wykonanych pracach inwentaryzacyjnych. Dzięki temu

powstało kilkadziesiąt prac dotyczących różnych aspektów tego zjawiska kulturowego.

Kolejny referat dr Anny Dulskiej (Uniwersytet Nawarry w Pampe-  
lunie) nosił tytuł *Średniowieczne nekropolie żydowskie w Hiszpanii – stan  
i perspektywy badań*. Prelegentka oparła się na tezie, że nekropolie są  
jednym z najobfitszych w treść reliktywów kultury średniowiecznych Żydów  
sefardyjskich oraz posiadają ogromny potencjał badawczy. Pozyskiwany  
z nich materiał antropologiczny, archeologiczny i epigraficzny pozwala na  
odtworzenie historii, obrzędowości i religijności społeczności żydowskiej  
w dawnej Hiszpanii.

Następnie mgr Bartłomiej Gutowski (UKSW w Warszawie) w referacie  
pt. *Cmentarze polskie i miejsca pochówku Polaków poza granicami kraju. Stan  
badań i perspektywy badawcze* zaprezentował analizę badań podejmowa-  
nych nad dokumentacją polskich cmentarzy i grobów. Autor wystąpienia  
przedstawił w sposób syntetyczny stan badań oraz perspektywy badawcze.  
Większość badań przypada na lata po roku 1989, a pierwszą dużą falę prac  
dokumentacyjnych możemy datować na lata 90. ubiegłego stulecia.

Jako ostatnia w przedpołudniowej części wystąpień przewidzianych  
w panelu nr 1 głos miała zabrać mgr Anna Majewska (UŁ), która nie-  
estety nie dotarła na obrady konferencji. Jej referat *Nie-ludzcy ocaleni. Na-  
grobniki żydowskie w polskich zbiorach muzealnych* miał dotyczyć elementów  
przestrzeni cmentarzy żydowskich (głównie kamieni nagrobnych), które  
często są zarówno składnikami tzw. nie-ludzkiej pamięci, jak i material-  
nymi nośnikami żywej pamięci.

Tymczasem w prowadzonych równolegle obradach w panelu nr 2 (sala  
nr 19) zatytułowanym *Cmentarz w tekstach kultury*, prowadzonym przez  
dr hab. Katarzynę Smyk (UMCS), jako pierwszy został przedstawiony re-  
ferat mgr Mileny Chilińskiej (UW) pt. *Przestrzeń cmentarza anhelicznego  
w malarzkiej wizji Witolda Pruszkowskiego*. Z powodu nieobecności autor-  
ki został on odczytany przez organizatorów konferencji. Referat dotyczył  
przestrzeni cmentarnej jako jednego z często wykorzystywanych moty-  
wów imaginacyjnych w dorobku Witolda Pruszkowskiego (1846-1896),  
polskiego malarza i literata drugiej połowy XIX w. Pruszkowski w swojej  
twórczości inspirował się romantycznym poematem *Anhelli* Juliusza Sło-  
wackiego, który niezwykle intensywnie oddziaływał na wyobraźnię twór-  
ców modernizmu.

Kolejny referat, dr Magdaleny Grabias (UMCS), zatytułowany *Este-  
tyka, rola i znaczenie cmentarza w kinie grozy na przykładzie twórczości  
Tima Burtona*, stał się próbą analizy i interpretacji estetyki, roli i znacze-  
nia cmentarza w kinie grozy na przykładzie wybranych filmów amerykań-  
skiego reżysera Tima Burtona (ur. 1958), uchodzącego za jednego z naj-  
większych ekscentryków Hollywood.

Następnie dr Estera Głuszko-Boczoń (UR) w wystąpieniu pt. *Cmentarz jako „miejsce pojednania” na przykładzie wybranych utworów z literatury niemieckojęzycznej* poruszyła dość istotną tematykę z punktu widzenia literatury niemieckiej. Temat ten jest podejmowany stosunkowo często w powieściach z okresu realizmu niemieckiego, m.in. przez Theodora Fontanego (1819-1898). Autorka odniosła się do twórczości również innych niemieckich pisarzy, np. Tomasza Manna (1875-1955) czy Güntera Grassa (1927-2015), którzy wykorzystywali motyw cmentarza jako miejsca pojednania. Szczególnie ten ostatni w interesujący sposób przedstawił temat cmentarza jako miejsca pojednania zwaśnionych narodów.

Ostatnie wystąpienie w tym panelu było autorstwa mgr Anety Świder-Pióro (UW), która w referacie *„Układam kamyczki na własny grobowiec” – o Juliusza Słowackiego cmentarzu, grobie, pamięci i zapomnieniu* omówiła niezwykle częste w twórczości Juliusza Słowackiego motywy cmentarne. Pojawiają się one w korespondencji, w szkicach, w których poeta projektuje nagrobne pomniki, a także w listach potwierdzających, że Słowacki bardzo często w trakcie swoich podróży odwiedzał miejscowe nekropolie.

Po przerwie obiadowej w panelu nr 3 o nazwie *Ornamentyka i symbolika* prowadzonym przez prof. dr. hab. Jana Adamowskiego głos jako pierwszy zabrał dr hab. Andrzej Trzciński, przedstawiając pracę pt. *Słowne i ikonizacyjne reprezentacje motywu księgi/książki na nagrobkach żydowskich w Polsce*. Wskazał on, że podstawowym materiałem źródłowym dla prezentowanego zagadnienia są inskrypcje oraz przedstawienia figuratywne na nagrobkach żydowskich na historycznych obszarach Rzeczypospolitej od XIII do XXI w. Słowne motywy występują w całym omawianym okresie, natomiast ikonizacyjne znane są dopiero od początku XIX w. Na końcu swojego wystąpienia prof. Trzciński wysunął kilka ogólnych wniosków dotyczących analizowanego tematu, m.in. stwierdzając, że motyw książki (księgi) jest ważnym motywem w tradycji i kulturze żydowskiej od czasów biblijnych po współczesne, również często przedstawianym na nagrobkach.

Jako następny wystąpił dr hab. Leszek Zinkow (AIK), który w referacie *Motywy staroegipskie w architekturze polskich cmentarzy. Rekonosans badawczy* omówił symbolikę egipską włączaną w programy ikonograficzne architektury sepulkralnej, zwłaszcza w XIX i początkach XX w. Jak przedstawił to prelegent, najczęściej implementacja tych motywów odbywała się na drodze skojarzeń dziedzictwa cywilizacji egipskiej z aspektami śmierci i wieczności. Na tle takiego kontekstu kulturowego autor zasygnalizował obecność podobnych zjawisk w architekturze polskich cmentarzy, zwłaszcza Warszawy i Krakowa. Oglądając bogaty materiał graficzny, zgromadzeni na sali słuchacze dowiedzieli się o kwestiach deformacji, reinterpretacji czy dezinterpretacji egipskich motywów i symboli, które znalazły swoje miejsce w uniwersum wyobrażeń nowożytnych.

Kolejne wystąpienie w tym panelu było autorstwa mgr Katarzyny Stańczuk (Muzeum im. Jacka Malczewskiego w Radomiu). Autorka w referacie pt. *Ornament popielnicy jako element pochówku? Przyczynę do rozważań nad stylistyką zdobnictwa ceramiki kultury lużyckiej na podstawie materiałów z regionu radomskiego* przedstawiła zagadnienie z postawionym w tytule pytaniem. Wynika to z faktu, że kultura lużycka, która jest jedną z kultur archeologicznych o największej obfitości występowania bardzo zróżnicowanego i bogatego zdobnictwa, na ziemi radomskiej posiada zdecydowanie mniej stanowisk sepulkralnych z ornamentowaną ceramiką niż w innych regionach naszego kraju.

Ostatnie wystąpienie w tej części konferencji było autorstwa mgr. Macieja Ratajczyka (Uniwersytet im. Adama Mickiewicza w Poznaniu). Prelegent wystąpił z pracą pt. *Cmentarz a religia i kultura karaimów polsko-litewskich*. Wystąpienie autora skupiło się na prezentacji wybranych zagadnień dotyczących funkcji, jaką pełnił cmentarz pośród członków mniejszości karaimskiej. Maciej Ratajczyk oparł swoją analizę na badaniach przeprowadzonych na cmentarzach znajdujących się na terytorium Ukrainy (Halicz) i Litwy (Troki, Nowe Miasto). Ciekawym aspektem wystąpienia były uwagi na temat karaimskiej kultury, o której możemy się dowiedzieć poprzez studiowanie nekropolii tej mniejszości, a w szczególności inskrypcji nagrobnych zapisanych w języku hebrajskim.

Równoległe z prowadzonymi obradami w panelu nr 3 uczestnicy panelu nr 4 (nazwa panelu: *Konflikty pamięci*) pod kierunkiem dr Teresy Klimowicz dyskutowali nad interesującymi zagadnieniami. Prof. dr hab. Joanna Ostrowska (Uniwersytet im. Adama Mickiewicza w Poznaniu) w referacie *Cmentarze wojenne jako performatywy* podjęła temat praktyk obramowywania cmentarzy wojennych kontekstem mającym uczynić z nich antywojenne performatywy. Taką rolę miały odgrywać m.in. niemieckie cmentarze z czasów II wojny światowej. Prelegentka odniosła się również do cmentarzy wojennych z okresu I wojny światowej, które są świadectwem wielokulturowości Europy. Geograficznie prof. Ostrowska poddała analizie wojenne nekropolie z terenu Francji, Belgii i Polski.

Kolejny referat autorstwa dr. Rafała Niezgody pt. *Cmentarz jako miejsce transgresji, ezoteryzmu i erotyzmu* był wyzwaniem rzuconym tradycyjnemu postrzeganiu roli cmentarza w szeroko rozumianej kulturze. W polskiej świadomości i kulturze cmentarz jest traktowany jako miejsce święte, godne czci i chronione przed wszelkiego rodzaju profanacją. W innej formie rola nekropolii jest przedstawiana w kulturach zlaicyzowanych, np. we Francji, gdzie według autora zakorzeniona od czasów rewolucji laicyzacja pozbawiła cmentarz jego *stricte* religijnych kontekstów. Odsakralizowanie francuskiego cmentarza stworzyło przestrzeń ponownej reinterpretacji śmierci i sposobów jej przeżywania. W ten sposób

nekropolia stała się miejscem nowych interpretacji, symboli, motywów i skłaniała do przełamywania tabu.

Następnie głos zabrała dr Joanna Szymoniczek (Akademia Sztuk Pięknych w Warszawie), która w referacie pt. *Spoleczności lokalne wobec niemieckich grobów wojennych z okresu II wojny światowej w Polsce. Analiza uwarunkowań historycznych, aspektów prawnych, etycznych oraz czynników społecznych i psychologicznych* dotknęła newralgicznego problemu, jakim jest wzajemne zrozumienie, dające prawo agresorowi i okupantowi do pielęgnowania pamięci poległych. Kontekstem wystąpienia dr Szymoniczek było wspólne oświadczenie Tadeusza Mazowieckiego i Helmuta Kohla z 14 listopada 1989 r. regulujące sprawę budowy niemieckich cmentarzy z okresu II wojny światowej na terenie Polski.

Ostatni referat przed przerwą autorstwa mgr Anji Franczak (Uniwersytet w Hildesheim) dotyczył aktualnych trendów w pochówku, jakie występują w Europie Zachodniej (tytuł wystąpienia: *Grób pod drzewem. O trendach naturalnych pochówków w Niemczech i Wielkiej Brytanii*). Prelegentka przedstawiła rosnącą tendencję pochówków w lasach, gdzie prochy zmarłych składane są w biodegradowalnych urnach przy korzeniach drzew. Podobnie na terenie Zjednoczonego Królestwa obserwujemy wzrastającą liczbę tzw. „Natural Burial Grounds” (tereny naturalnego pochówku), co oznacza, że w miejsce lakierowanych trumien stosowane są tam modele z materiałów naturalnych, jak np. wiklina. Na takich cmentarzach nie ma nagrobków, a możliwość dekoracji grobu jest mocno ograniczona, aby otoczenie utrzymało przyrodniczy charakter.

Grupa prelegentów w panelu nr 5 spotkała się w ramach dyskusji *Cmentarze wojenne*. Moderatorem tej części konferencji była dr Anna Wiernicka. Jako pierwszym oddała głos dr Joannie Wawrzenuk i mgr. Romanowi Szlązakowi (UKSW), którzy w referacie pt. *Cmentarze wojenne Puszczy Białowieskiej – pamięć miejsca i tragedii* przedstawili zlokalizowane na terenie Puszczy Białowieskiej miejsca pochówków będące świadectwem nowożytnych i współczesnych konfliktów zbrojnych. Wyniki prezentowanych badań związane są z realizacją przez autorów referatu projektu Narodowego Centrum Nauki pt. *Dziedzictwo kulturowe i przyrodnicze Puszczy Białowieskiej*.

Następnie głos zabrał mgr Paweł Ajdacki (Biblioteka Publiczna w Dzielnicy Wawer m.st. Warszawy), który w referacie pt. *Cmentarze bitwy warszawskiej 1914 r. Stan zachowania, konserwacja, ochrona, problemy i rozwiązania* dokonał analizy kilkudziesięciu cmentarzy położonych pomiędzy Warszawą, Grójcem i Wisłą. Na tych nekropoliach spoczywają przede wszystkim żołnierze armii rosyjskiej i niemieckiej polegli bądź zmarli z ran w październiku i listopadzie 1914 r. w trakcie ofensywy niemieckiej 9 Armii próbującej zdobyć Warszawę.



Temat cmentarzy wojennych był kontynuowany przez kolejną prelegentkę mgr Jolantę Aniszewską (Muzeum Archeologiczno-Historyczne w Stargardzie). W swoim wystąpieniu pt. *Dwa cmentarze wojenne i ich miejsce w sporze o pamięć w powojennym Stargardzie* poruszyła ona temat pamięci o poległych żołnierzach z okresu I i II wojny światowej na terenie Stargardu. Na terenie tych cmentarzy odniesienia do przeszłości i pamięci o poległych mieszały się z ideologią, a obecnie interpretacją historyczną.

Ostatnim wystąpieniem w tej części sesji był referat mgr. Tomasza Woźnego (Stowarzyszenie „Cruce Galicie”, Stowarzyszenie „Studnia Pamięci”) pt. *Austro-węgierskie cmentarze wojenne z lat 1914-1918*. W wystąpieniu prelegent omówił charakterystyczne cechy austro-węgierskiego grobownictwa wojskowego, którego najlepszym przykładem na obszarze Polski jest unikalny kompleks cmentarzy wojennych na terenie dawnej Galicji.

Tymczasem równolegle uczestnicy panelu nr 6 w trakcie minisesji *Konserwacja i ochrona* prowadzili ożywione dyskusje moderowane przez mgr Monikę Tarajko (UMCS). Pierwszy referat był autorstwa prof. dr. hab. Wiesława Procyka (Akademia Sztuk Pięknych w Warszawie). W wystąpieniu zatytułowanym *Cmentarz Powązkowski w Warszawie – otwarta księga problemów ochrony zabytków sztuki funeralnej* omówił on efekty i historię współpracy Społecznego Komitetu Opieki nad Starymi Powązkami i warszawskiej Akademii Sztuk Pięknych, która trwa od połowy lat 70. ubiegłego stulecia.

Kolejny referat został wygłoszony przez mgr Agnieszkę Nieradko (Komisja Rabiniczna ds. Cmentarzy, Fundacja Zapomniane). W swoim wystąpieniu (*Zakres i cele działalności Komisji Rabinicznej ds. Cmentarzy*) prelegentka omówiła zasady funkcjonowania Komisji Rabinicznej ds. Cmentarzy. Wystąpienie miało charakter praktyczny, gdyż zostały przedstawione główne zagrożenia dla żydowskich cmentarzy oraz kierunki, które dają szansę na przetrwanie zabytkowych nekropolii.

Następnie mgr Piotr Owczarek (Akademia Sztuk Pięknych w Warszawie) w referacie pt. *Nagrobki na cmentarzu tatarskim w Studziance – prace badawcze i konserwatorskie w latach 2017-2018* mówił o założonym w XVII w. cmentarzu tatarskim w Studziance. Nekropolia ta stanowi interesującą atrakcję turystyczną, a zachowane tam nagrobki są świadectwem wielokulturowej historii dawnej Rzeczypospolitej.

Pierwszy dzień konferencji zakończyło wystąpienie lic. Tomasza Ryrycha (Uniwersytet Pedagogiczny im. KEN w Krakowie) pt. *Cmentarze ewangelickie na terenie zachodniej Galicji*. W referacie na tle samych nekropolii ewangelickich (w Stadłach, Gawłowie, Wieliczce i Nowy Sączu-Dąbrówce) została poruszona historia społeczności niemieckich na terenach historycznie przynależących do zachodniej Galicji. Co ciekawe,

ostatni pogrzeb na ewangelickiej kwaterze w Wieliczce odbył się na początku 2019 r.

Następnego dnia podczas obrad panelu nr 7 (*Dziedzictwo i pamięć*) prowadzonego przez dr. Jana Kutnika (KUL) jako pierwszy wystąpił prof. dr hab. Jerzy Kołacki (UAM). W swoim referacie pt. *Przywracanie pamięci o protestanckim dziedzictwie kulturowym: cmentarze ewangelickie w Wielkopolsce* poruszył interesujące zagadnienie naukowych eksploracji wokół protestanckiego dziedzictwa kulturowego, które reprezentują głównie ewangelickie cmentarze w Wielkopolsce.

Kolejną prelegentką, mgr Monika Tarajko, w prezentacji pt. *70 lat po Caninie. Pamięć i nie-pamięć a cmentarze żydowskie Lubelszczyzny* nawiązała do postaci Mordechaja Canina, dziennikarza i korespondenta nowojorskiego „Forwerts”, który w latach 1945-1947 podróżował po Polsce, dokumentując ocalałe ślady historii i Zagłady Żydów. Autorka, na podstawie zgromadzonych materiałów i przeprowadzonych badań, omówiła rodzaje upamiętnień, prawne i praktyczne formy ochrony nekropolii żydowskich oraz stopień ich wykorzystania w edukacji kulturowej, turystyce i genealogii. Ma to posłużyć próbie porównania stanu obecnego z danymi i opisami zarejestrowanymi przez Mordechaja Canina.

Następną osobą, która zabrała głos, była mgr Monika Plata (SWPS Uniwersytet Humanistyczno-Społeczny). W swoim wystąpieniu pt. *Cmentarze zakaźne dawnej Warszawy* poruszyła temat epidemii, które od zarania ludzkości towarzyszyły człowiekowi i były związane ze zmarłymi oraz pochówkami. Autorka skupiła się na epidemiach, które dotyczyły Warszawy i powodowały fundowanie cmentarzy. Do dziś w architekturze Warszawy odnaleźć można obiekty bezpośrednio związane z epidemiami, np. cmentarz choleryczny na esplanadzie Fortu Śliwickiego, cmentarz zażumionych na Starym Bródnie, Szpital Wolski przy ul. Płockiej czy kapielniczki dzięki którym ocalenie z zarazy.

Ostatni w tym panelu wystąpił mgr inż. Waldemar Wigłusz (Towarzystwo Przyjaciół Nauk w Przemyśle) z referatem *Jak uratowałem/nie uratowałem cmentarz/a w Przemiuólkach*. Autor dokonał opisu cmentarza w Przemiuólkach koło Żółkwi oraz przedstawił historię uratowania od zapomnienia tej nekropolii.

Równoległe trwały obrady panelu nr 8 (*Językowy obraz cmentarza*), gdzie dyskusję moderował prof. dr hab. Jan Adamowski. Jako pierwszy głos zabrała dr hab. Agnieszka Szczaus (USz), przedstawiając referat pt. *Językowy obraz kobiet w inskrypcjach nagrobnych z cmentarza na Pęksowym Brzyzku w Zakopanem*. Celem wystąpienia była analiza inskrypcji na cmentarzu na Pęksowym Brzyzku w Zakopanem (Stary Cmentarz, Cmentarz Zasłużonych) poświęconych kobietom i na tej podstawie rekonstrukcja językowego obrazu kobiet wyłaniającego się z epitafiów.

Kolejna prelegentka, dr Agata Rybińska, w pracy pt. *Żydowskie modlitwy za zmarłych w przestrzeni cmentarza (analiza tekstów z XIX w.)*, zaprezentowała zróżnicowanie gatunkowe oraz specyfikę żydowskich modlitw za zmarłych odmawianych na cmentarzach. W referacie autorka przede wszystkim skoncentrowała się na omówieniu dziewiętnastowiecznych modlitw, których nie analizowano dotychczas w polskojęzycznych badaniach.

Następnie mgr Małgorzata Cetra (UwB) przedstawiła referat pt. *Imiona męskie w inskrypcjach nagrobnych cmentarza prawosławnego w Hajnówce*. Tematem przewodnim wystąpienia był repertuar imion męskich z jednego z dwóch dużych cmentarzy Hajnówki, która jest miastem wielowyznaniowym i wielonarodowym. W Hajnówce, gdzie znajduje się zarówno duży cmentarz prawosławny, jak i katolicki, wyznanie nie zawsze decyduje o miejscu pochówku. Podobnie istotne są również względy rodzinne, gdyż w mieście małżeństwa i rodziny mieszane są częstym zjawiskiem.

Na zakończenie tej części sesji mgr Viktoriia Cherniak (UW) omówiła w pracy *Polskie napisy nagrobne w kilku miejscowościach na Żytomierszczyźnie* polskojęzyczne napisy nagrobne z cmentarzy Dowbysza, Berdyczowa, Nowego Zawodu i Pokostówki, w szczególności ich stronę językową (tj. tekstów nagrobnych), jak również zjawiska graficzne, fonetyczne oraz morfologiczne. Autorka dokonała także interesujących interpretacji epitafiów i dedykacji znajdujących się na nagrobkach.

Po przerwie, w panelu nr 9 (*Świadectwa i źródła historyczne*) prowadzonym przez dr. hab. Adama Kopciowskiego (UMCS), pierwsze wystąpienie autorstwa dr Anny Wiernickiej było zatytułowane *Turkułowi Ministrowi i Sekretarzowi Stanu Królestwa Polskiego dzieło pod tytułem Fedon (...). O zapisach testamentowych żydowskich mieszkańców Warszawy w XIX wieku*. Autorka w trakcie wystąpienia podjęła się próby udowodnienia, że testamenty stanowią wyjątkowo cenne źródło w badaniach nad historią życia codziennego.

Następnie dr inż. Anna Majdecka Strzeżek (Pracownia Architektury Krajobrazu) w pracy *Historyczne cmentarze jako wyróżniki krajobrazu kulturowego* przedstawiła instytucję cmentarza w kontekście specyficznej grupy założeń ogrodowych, których celem jest zachowanie i przywoływanie pamięci. Pod wpływem różnych epok historycznych i kultur położone w różnych regionach cmentarze stanowią ważny oraz łatwo rozpoznawalny element krajobrazu.

Później mgr Kamila Oleszczuk-Kasperek (KUL) w referacie *Nagrobki unickie i prawosławne na cmentarzu w Łomazach jako pamiątka wielokulturowości wsi, która była miastem* omówiła na tle dziejów Łomaz (nieopodal Białej Podlaski), obecnie wsi, a niegdyś miasta lokowanego na prawie magdeburskim, dziedzictwo miejscowego cmentarza komunalnego, który jest świadectwem wielokulturowej historii tego regionu. Do dzisiaj

zachowały się na miejscowym cmentarzu groby unickie i prawosławne, które stanowią niezwykle źródło informacji o przeszłości.

Ostania głos w tym panelu zabrała mgr Justyna Karkus (UŁ), przedstawiając w referacie *O czym mówią umarli – cmentarz jako źródło wiedzy o dawnym człowieku* zagadnienia wchodzące w ramy niezbyt znanej, ale interesującej dyscypliny naukowej: antropologii biologicznej. Jest to nauka zajmująca się badaniem człowieka w czasie i przestrzeni. W tym kontekście dawne cmentarze odkrywane i badane podczas wykopalsk archeologicznych stanowią cenne źródło wiedzy o dawnych kulturach i społecznościach.

W panelu nr 10 (*Językowy obraz cmentarza*) moderujący wystąpienia prof. dr hab. Jan Adamowski jako pierwszej oddał głos dr Marioli Tymochowicz (UMCS). Prelegentka w pracy pt. *Ubiór zmarłego – symbolika i przemiany (na materiale z Lubelszczyzny)* na podstawie materiałów etnograficznych pozyskanych z terenu woj. lubelskiego omówiła poszczególne rodzaje ubiorów uwzględniające płeć, wiek zmarłego, a także przyjęte wierzenia towarzyszące czynności ubierania. Ponadto autorka wspomniała o symbolice stosowanych kolorów przy doborze odzieży na pochówek.

Jako kolejna głos zabrała dr Joanna Wawrzeniuk (UKSW), która w wystąpieniu *Duchowa i materialna rola przewodów i radunicy – przykłady z polsko-białoruskiego pogranicza* przedstawiła zwyczaj wiosennego wspominania zmarłych w polskich przewodach i białoruskiej radunicy. Są to święta, które w kalendarzu chrześcijan wschodnich zajmują ważne miejsce i bezpośrednio wiążą się z kulturą pogrzebową.

Następnie dr Łukasz Burkiewicz (AIK) w referacie *Rola cmentarza w timurydzkiej kulturze pogrzebowej. Kilka uwag na podstawie kastylijskiej kroniki Ambasada do Tamerlana (1403-1406)* zaprezentował wybrane wątki dotyczące timurydzkiej kultury pogrzebowej, które wynikają z kastylijskiej relacji podróżniczej *Ambasada do Tamerlana*. Wśród przedstawicieli świata łacińskiego kultura pogrzebowa świata timurydzkiego mogła wzbudzać szok kulturowy, w szczególności swoista pogarda dla przeciwnika, w zasadzie zaś dla jego ciała (np. wieże z ludzkich głów budowane dla przestrogi, jak i dla wyrażenia pogardy wobec przeciwnika). Z drugiej zaś strony pojawiały się wzbudzające podziw mauzolea (najczęściej w formie meczetów), które podkreślały rolę zmarłych krewnych dla Tamerlana.

Jako ostatni w tym panelu głos zabrał mgr Marcin Stańczuk (Muzeum Wsi Radomskiej w Radomiu) z referatem zatytułowanym *Zwyczaj i wierzenia związane ze śmiercią, pogrzebem i cmentarzem w regionie radomskim*. Prelegent w swoim wystąpieniu odniósł się do zanikających zwyczajów i wierzeń łączących się ze śmiercią, pogrzebem i cmentarzem w regionie radomskim, czyli w obszarze określonym rzekami Wisłą, Pilicą, Kamienną, Drzewiczką oraz zamkniętym przez Garb Gielniowski.

Na zakończenie konferencji jej organizatorzy (prof. dr hab. Jan Adamowski, dr Teresa Klimowicz, dr Jan Kutnik, dr Agata Rybińska, dr Mariola Tymochowicz, mgr Monika Tarajko) podziękowali wszystkim uczestnikom za udział. Uczestnicy sesji mieli okazję wysłuchać interesujących wystąpień i dyskusji na temat cmentarza jako tekstu kultury. Ta ciekawa koncepcja, której podołali zaproszeni prelegenci, przyniosła szeroką dyskusję nad nekropoliami w aspekcie materialnego i niematerialnego dziedzictwa. Ponadto sesja dostarczyła inspiracji w różnych kontekstach: historycznym, filologicznym, społecznym, kulturowym i innych, takich jak również wielokulturowość. Co ważne, wskazano także nowe perspektywy badawcze.

Tematyka przedstawionych referatów okazała się na interesująca nie tylko dla samych prelegentów, lecz również dla studentów licznie wypełniających obydwie sale, w których jednocześnie toczyły się obrady. Organizatorzy konferencji przewidują publikację wygłoszonych referatów. Po formalnym zakończeniu naukowej części konferencji organizatorzy zorganizowali wydarzenia towarzyszące w postaci spaceru po cmentarzach lubelskich.



**Łukasz Burkiewicz** – kulturoznawca, historyk i ekonomista kultury. Adiunkt w Instytucie Kulturoznawstwa Akademii Ignatianum w Krakowie. Jego zainteresowania naukowe są związane z dziejami kultury państw basenu Morza Śródziemnego w średniowieczu i epoce nowożytnej. Zajmuje się również podrózkami średniowiecznymi. W kręgu jego badań znajdują się ponadto kwestie związane z zarządzaniem, marketingiem i ekonomiką kultury. Dyrektor projektów wsparcia czasopism w Akademii Ignatianum w Krakowie. Redaktor naczelny „Perspektyw Kultury”.

## Perspektywy Kultury

Czasopismo naukowe Instytutu Kulturoznawstwa  
Akademii Ignatianum w Krakowie

ISSN 2081-1446

„Perspektywy Kultury” to regularnie ukazujący się od 2009 roku kwartalnik Instytutu Kulturoznawstwa Akademii Ignatianum w Krakowie. Czasopismo w 2019 roku zostało nagrodzone grantem w ramach programu *Wsparcie 500 czasopism naukowych* Ministerstwa Nauki i Szkolnictwa Wyższego i jest ujęte w wykazie czasopism naukowych MNiSW z dnia 31 lipca 2019 roku, w którym przyznano mu 20 punktów. Numery archiwalne czasopisma oraz instrukcja wydawnicza dla autorów znajdują się w serwisie czasopisma na platformie Open Journal Systems: <https://czasopisma.ignatianum.edu.pl/pk>

Każdy numer czasopisma wydawany jest z określonym tematem przewodnim (tzw. temat numeru) oraz stałymi działami, którymi są:

1. **Zarządzanie międzykulturowe** (*Cross-cultural Management*)
2. **Europejskie dziedzictwo duchowe** (*European Spiritual Heritage*)
3. **Przestrzenie cyberkultury** (*Areas of Cyberculture*)
4. **Varia**
5. **Inne** (*Others*)

W dziale *Varia* publikowane są teksty o ogólnej tematyce kulturoznawczej. Dział *Inne* przyjmuje recenzje, sprawozdania, opinie, dyskusje i inne formy publikacji niebędące klasycznymi artykułami naukowymi.

**Procedura recenzowania:** Każdy tekst nadesłany do redakcji „Perspektyw Kultury” jest recenzowany. Redakcja zastrzega sobie prawo do skracania tekstów i zmiany tytułów. Materiałów niezamówionych redakcja nie zwraca.

Początkowo tekst zostaje zaopiniowany przez redaktorów tematycznych oraz językowych w celu wstępnego określenia jego wartości merytorycznej i formalnej. Redakcja może odrzucić na tym etapie tekst, który nie spełnia oczekiwań i wymogów merytorycznych związanych z aktualnym stanem wiedzy w danej dziedzinie humanistyki. Teksty interesujące, lecz odbiegające od norm językowych bądź zaleceń formalnych proponowanych przez redakcję w instrukcji dla autorów zostają najczęściej odesłane do autora z sugestią poprawy.

Wszystkie teksty, które zostają pozytywnie zaopiniowane na wstępnym etapie tworzenia numeru, przekazywane są następnie recenzentom zewnętrznym (procedura „double blind review”). W innych przypadkach recenzenci są zobowiązani do podpisania deklaracji o niewystępowaniu konfliktu interesów.

Proces recenzji kończy się pisemną notatką zawierającą zwięzłą opinię i uzasadnienie oraz jednoznacznie określony status tekstu. Tekst może mieć status dopuszczonego bądź niedopuszczonego do publikacji.

Adres redakcji: „Perspektywy Kultury”  
ul. Kopernika 26, 31-501 Kraków; tel. 12 3999 662  
e-mail: [perspektywykultury@ignatianum.edu.pl](mailto:perspektywykultury@ignatianum.edu.pl)

## *Perspectives on Culture*

Academic Journal of the Institute of Cultural Studies,  
Jesuit University Ignatianum in Krakow

ISSN 2081-1446

*Perspectives on Culture* is a regularly published quarterly of the Institute of Cultural Studies of Jesuit University Ignatianum in Krakow since 2009. In 2019 the journal obtained a grant within the *Support for 500 scientific journals* programme awarded by the Ministry of Science and Higher Education and is included in the list of scientific journals published by the Ministry of Science and Higher Education on 31 July 2019, where it was assigned 20 points. The archival numbers and the guidelines for authors can be found in libraries and in the digitised form in the Open Journal Systems platform: <https://czasopisma.ignatianum.edu.pl/pk>

Each issue of the journal has a specific leading theme and the following regular sections:

1. **Cross-cultural Management**
2. **European Spiritual Heritage**
3. **Areas of Cyberculture**
4. **Varia**
5. **Others**

The *Varia* section includes texts devoted to general cultural, literary, and historical topics. The *Others* section contains reviews, reports, opinions, discussions, and other texts that are not traditional (ranked) scientific articles.

**Reviewing procedure:** Each article sent to the editorial team of *Perspectives on Culture* is reviewed. The editorial team reserves the right to shorten the texts and change the titles. Materials which had not been ordered will not be returned.

Initially, a text is reviewed by thematic and language editors in order to predetermine its substantive and formal value. The editors may reject a text at this stage should it not meet the expectations and requirements of substance related to the current state of knowledge in the given field of the humanities. Interesting texts, but deviating from language norms or formal recommendations proposed by the editors in the instructions for authors are sent back to the authors with suggestions of improvement.

All texts that are positively evaluated at the initial stage of creating the issue are then passed on to external reviewers (the "double blind review" procedure). In other cases, the reviewers are required to sign a declaration of no conflict of interest.

The review process ends with a written note containing a concise opinion and justification, and a clearly defined status of the text. The text may receive an authorized or unauthorized for publication status.

The Editors' address: Perspectives on Culture  
ul. Kopernika 26, 31-501 Kraków; tel. +48 12 3999 662  
e-mail: [perspektywykultury@ignatianum.edu.pl](mailto:perspektywykultury@ignatianum.edu.pl)

Recenzenci / Reviewers: dr Olga Biłobrowiec (Uniwersytet Państwowy imienia Iwana Franki w Żytomierzu); dr hab. Stanisław Cieślak SJ, prof. AIK (Akademia Ignatianum w Krakowie); dr Grzegorz Chajko (Uniwersytet Papieski Jana Pawła II w Krakowie); ks. dr hab. Michał Drózd, prof. UPJP2 (Uniwersytet Papieski Jana Pawła II w Krakowie); dr Sławomir Dryja (Uniwersytet Papieski Jana Pawła II w Krakowie); dr hab. Beata Domańska-Szaruga, prof. UPH (Uniwersytet Przyrodniczo-Humanistyczny w Siedlcach); dr Krzysztof Duda (Akademia Ignatianum w Krakowie); prof. dr hab. Katarina Fichnova (Uniwersytet Ekonomiczny w Katowicach); dr Krzysztof Fokt (Uniwersytet Jagielloński); dr Kinga Anna Gajda (Uniwersytet Jagielloński); dr hab. Ewa Głażewska, prof. UMCS (Uniwersytet Marii Curie Skłodowskiej w Lublinie); dr Dariusz Głuch (Uniwersytet Jagielloński); dr hab. Anna Gomółka (Uniwersytet Śląski w Katowicach); dr hab. Tomasz Graff (Uniwersytet Papieski Jana Pawła II w Krakowie); prof. dr hab. Anna Grzegorzczak (Uniwersytet im. Adama Mickiewicza w Poznaniu); dr Marek Hafaburda (Uniwersytet Papieski Jana Pawła II w Krakowie); dr Michał Hanczakowski (Univerzita Palackého v Olomouci); dr Dariusz Grzonka (Akademia Ignatianum w Krakowie); dr Barbara Hryszko (Akademia Ignatianum w Krakowie); dr hab. Agnieszka Kaczmarek, prof. UAM (Uniwersytet im. Adama Mickiewicza w Poznaniu); prof. dr hab. Ewa Kosowska (Uniwersytet Śląski w Katowicach); dr Agnieszka Knap-Stefaniuk (Akademia Ignatianum w Krakowie); doc. Peter Mikulas (Univerzita Konštantína Filozofa v Nitre); dr hab. Anna Mlekođaj, prof. PPUZ (Podhalańska Państwowa Uczelnia Zawodowa w Nowym Targu); dr hab. Grzegorz Nieć, prof. UP (Uniwersytet Pedagogiczny w Krakowie); dr Tatiana Pawlińczuk (Uniwersytet Państwowy imienia Iwana Franki w Żytomierzu); dr Paula Pyplacz (Politechnika Częstochowska); dr Wit Pasierbek SJ (Akademia Ignatianum w Krakowie); prof. dr hab. Danuta Quirini-Popławska (Uniwersytet Jagielloński); prof. dr hab. Dariusz Rott (Uniwersytet Śląski w Katowicach); dr hab. Anna Ryłko-Kurpiewska, prof. UG (Uniwersytet Gdański); dr Senri Sonoyama (Uniwersytet Jagielloński); dr hab. Monika Stankiewicz Kopeć (Akademia Ignatianum w Krakowie); dr hab. Beata Stuchlik-Surowiak (Uniwersytet Śląski w Katowicach); dr Natasa Styryna (Uniwersytet Papieski Jana Pawła II w Krakowie); prof. Zdenka Švarcová (Univerzita Palackého v Olomouci); dr Aleksandra Szczechla (Uniwersytet Jagielloński); dr hab. Wiktor Szymborski (Uniwersytet Jagielloński); prof. PhDr. Jiří Trávníček (Akademie věd České republiky); dr hab. Zbigniew Widera, prof. UE (Uniwersytet Ekonomiczny w Katowicach); dr Łukasz Wojciechowski (Univerzita sv. Cyrila a Metoda v Trnave)



# HUMANITAS

STUDIA KULTUROZNAWCZE

*Badania • Wprowadzenia • Monografie • Źródła*

Seria pod redakcją Andrzeja Gielarowskiego

Publikacje serii wydawniczej „Humanitas. Studia Kulturoznawcze” przygotowywanej przez pracowników naukowych Instytutu Kulturoznawstwa Akademii Ignatianum w Krakowie kierowane są do czytelnika zainteresowanego refleksją nad kulturą i religią w zakresie ich źródeł, natury i przemian dokonujących się przez wieki oraz współcześnie.

Celem serii jest wprowadzanie w meandry nauk o kulturze i religii, a także prezentowanie najnowszych badań w tym zakresie. Dlatego w serii tej publikowane są zarówno prace zbiorowe i podręczniki, jak też monografie oraz teksty źródłowe ujmujące kulturę i religię z różnych perspektyw badawczych.

Naukowy charakter serii – gwarantowany przez uczestnictwo w jej tworzeniu kompetentnych badaczy poszczególnych nauk o kulturze i religii – idzie w parze z jej przystępnością dla czytelników stawiających pierwsze kroki w analizowaniu fenomenów kultury i religii.

## DOTĄD OPUBLIKOWANO:

- *Poza utopią i nihilizmem. Człowiek jako podmiot kultury*, red. naukowa A. Waško, Kraków 2007.
- *Odczarowania. Człowiek w społeczeństwie*, red. naukowa A. Gielarowski, T. Homa, M. Urban, Kraków 2008.
- *Stanisława Orzechowskiego i Augustyna Rotundusa debata o Rzeczypospolitej*, wybór i opracowanie K. Koehler, Kraków 2009.
- Bogusława Bodzioch-Bryła, *Kapłan Biblioteki. O poetyckiej i eseistycznej twórczości Adama Zagajewskiego*, Kraków 2009.
- *Symbol w kulturze rosyjskiej*, red. K. Duda, T. Obolovitch, Kraków 2010.
- *Globalizacja w kulturze. Upowszechnienie czy uproszczenie*, red. naukowa B. Bodzioch-Bryła, R. Szczepaniak, K. Wałczyk, Kraków 2010.
- *Egzystencja i kultura*, red. P. Duchliński i M. Urban, Kraków 2010.
- *Krzysztofa Warszewickiego i Anonima uwagi o wolności szlacheckiej*, red. K. Koehler, Kraków 2010.
- *The influence of Jewish Culture*, red. J. Bremer, T. Obolovitch, Kraków 2011.
- Renata Jasnos, *Deuteronomium jako „księga” w kontekście kultury piśmienniczej starożytnego Bliskiego Wschodu*, Kraków 2011.

- *Stanisława Orzechowskiego i Franciszka Stankara pisma o państwie i religii – „Chimera” i „Reguły reformacji”,* wstęp i opracowanie K. Koehler, Kraków 2012.
- Stanisław Stabryła, *Historia kultury europejskiej. Starożytność*, Kraków 2012.
- Jan Konior SJ, *Historia polsko-chińskich kontaktów kulturowych w XVII w. (na przykładzie misji jezuitów)*, Kraków 2013.
- *Russian Thought in Europe. Reception, Polemics, Development*, red. naukowa T. Obolevich, T. Homa, J. Bremer, Kraków 2013.
- *Stanisława Orzechowskiego i Andrzeja Frycza Modrzewskiego spór o wiarę. „Frycz” St. Orzechowskiego oraz „Prosta opowieść” i „Orzechowski” A.F. Modrzewskiego*, wstęp i opracowanie K. Koehler, Kraków 2013.
- *W stronę hermeneutyki kultury*, red. naukowa T. Tisończyk, A. Waško, Kraków 2013.
- Monika Stankiewicz-Kopeć, *Pominięte, niedocenione, niedokończone. Studia i rozprawy o kulturze literackiej XIX wieku*, Kraków 2014.
- Jan Konior SJ, *Rola i znaczenie chrześcijaństwa w historii i kulturze Chin (od nestorianizmu do czasów współczesnych)*, Kraków 2014.
- *Oblicza wody w kulturze*, red. naukowa Łukasz Burkiewicz, Piotr Duchliński, Jarosław Kucharski, Kraków 2014.
- Bogusława Bodzioch-Bryła, Lilianna Dorak-Wojakowska, Michał Kaczmarczyk, Adam Regiewicz, *Przepływy, protezy, przedłużenia... Przemiany kultury polskiej pod wpływem nowych mediów po 1989 roku*, Kraków 2015.
- *Kronika za Zygmunta Augusta w Knyszynie zmarłego roku 1572 i inne dokumenty polityczne z czasów pierwszego bezkrólewia. Vol. 1. Od lipca 1572 do marca 1573*, wstęp i opracowanie K. Koehler, Kraków 2016.
- *Kultura na rynku. Wybrane zagadnienia z zarządzania, marketingu i ekonomiki w sferze kultury*, red. naukowa Ł. Burkiewicz, J. Kucharski, Kraków 2017.
- *Anatomia strachu. Strach, lęk i ich oblicza we współczesnej kulturze*, red. naukowa B. Bodzioch-Bryła, L. Dorak-Wojakowska, Kraków 2017.
- *Wzrokocentryzm, wizualność, wizualizacja we współczesnej kulturze*, red. naukowa B. Bodzioch-Bryła, L. Dorak-Wojakowska, D. Smołucha, Kraków 2017.

W przygotowaniu

- *Management – Tourism – Culture. Studies and reflections on tourism management*, eds. Ł. Burkiewicz, A. Knap-Stefaniuk, Kraków 2020.