

FAMILY, RELIGION, PEDAGOGY AND EVERYDAY EDUCATION PRACTICE

EDITORS

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INSTYTUT PEDAGOGIKI
UNIwersytetu Wrocławskiego

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**FAMILY, RELIGION, PEDAGOGY
AND EVERYDAY EDUCATION PRACTICE**

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TABLE OF CONTENTS

From the Editors 7

Part I

Family, Teachers and Everyday Educational Practice

Grażyna Lubowicka

A Family Apart. The Crisis of the Family in Postmodernity 15

Grażyna Lubowicka

Antigone's Claim. Norm and Non-Normative Model of the Family
by Judith Butler 29

Rafał Włodarczyk

Cruelty, Violence and Education by Michel de Montaigne.
An Essay on Pedagogical Deontology 43

Beata Pietkiewicz-Pareek

Parental Image in the Perception of Children from Divorced
Marriages in Qualitative Research 65

Wiktor Żłobicki

Parentification as a Process of Role Reversal in the Family 87

Wiktor Żłobicki

Performing the Professional Role by Teachers Who Experienced
Reversing Roles in the Family 99

Iwona Paszenda

Children's Everyday Creativity at School as an Inspiration for Action
Research on Education of Pedagogy Students 115

Part II

Religion, Pedagogy and Practice of Late Modernity

Monika Humeniuk

Bruno Latour's Theo-Ecologies and Eco-Theologies, or on the
Pedagogical Potential of a Hybrid Language as an Inspiration for
a Religious studies Pedagogy of Religion 141

Monika Humeniuk

Between Orthodoxy and Heresy in the Pedagogy of Religion.
The Hermeneutic and Aesthetic Inspirations by the Thought
of Gianni Vattimo, Luigi Pareyson and Erika Fischer-Lichte 155

Rafał Włodarczyk

Dimensions of Religious Fundamentalism in Theoretical
Perspective 173

Beata Pietkiewicz-Pareek

The Dynamics of Illiteracy Formation in India 199

Hanna Achremowicz

Between Stigma and Potential – Action Research in a Community
Under Exclusion 221

Team of the General Pedagogy Department at the Institute
of Pedagogy of the University of Wrocław 247

FROM THE EDITORS

This collection of texts by researchers of the University of Wrocław Department of General Pedagogy may be seen as a modest contribution to studies on the family, religion and everyday educational practice. The principal common denominator of these texts is the need for pedagogical reflection on late modernity, which in this work underpins consideration of issues on the borderline between educational theory and practice. Another characteristic they share is their focus on those selected aspects of family, religion and everyday educational practice that can be considered peripheral to these vital phenomena of social life. These selected aspects are, of course, cognitively interesting in themselves, as we hope the readers of the following chapters will discover. On the other hand, when put side by side and considered together, they provide insight into the fragments of the periphery understood as that part of the area of pedagogical research which is usually characterized by increased: ambiguity, differentiation, complexity, dynamics and incoherence. Moreover, it is often in the periphery that tendencies of change, paradoxes of civilization, and unresolvable social contradictions are created and initially manifested. In the case of research on the family, religion, and everyday educational practice, this is of particular importance, for these phenomena seem to belong to a category more resistant to change or difficult to transform or reform. This property becomes clearer if the aforementioned phenomena are considered in relation to those aspects of social life that show relatively greater flexibility. For example, if new technologies are relatively quickly applied in informal education, the time they need to be factored in school methodology and curricula is radically different. If the general public

and public consciousness react vividly to climate change or feminist demands, these have little bearing on the doctrinal and organizational arrangements of churches and other extended networks of religious institutions operating in the Western world. If late modernity is characterized by cyclical crises of traditional values that foster a gradual democratization of relations between members of a given political community and in the public sphere, a certain disorder can be said to exist with regard to the dominant family model. Therefore, from a pedagogical perspective, the ambiguity, divergence or incoherence evident on the periphery of such core aspects of social life as family, religion and everyday educational practice can be deemed cognitively interesting.

In the first part of this collection, the reader will find texts focusing on the crisis of a modern family, parentification, disorders in family patterns, 'ordinary' cruelty accompanying everyday educational practice, or the experiences of teachers. This experience is rarely taken into account in research, yet is vital for shaping teachers' professional roles. The second part of the collection includes studies integrating the perspectives of pedagogy with those of philosophy, religious studies, cultural anthropology and sociology. They focus on unconventional philosophical challenges posed to orthodox theologies, religious fundamentalisms, the dynamics of social exclusion, illiteracy, and stigmatization.

The first part entitled "Family, Teachers and Everyday Educational Practice" consists of seven chapters. It opens with an article by Grażyna Lubowicka "A Family Apart. The Crisis of the Family in Postmodernity". A crisis of the family in postmodernity is a consequence of various transformations related to phenomena such as a crisis of universal values, pluralism, individualism, or frailty of human bonds. The starting point of the author's considerations is the question how those phenomena impact the significance and stability of the family, bringing about the family crisis. In her second text "*Antigone's Claim. Norm and Non-Normative Model of the Family* by Judith Butler" Grażyna Lubowicka continues her reflections on the condition of the family in late modernity. Butler's problems in *Antigone's Claim* concern a decomposed and diverse family in postmodernity or a family subjected to deformations and displacements as well as the question of which model(s) the family may be heading towards. Rafał Włodarczyk in chapter "Violence and Education by Michel de Montaigne. An Essay on Pedagogical Deontology" refers

to concepts of cruelty by Michel de Montaigne and Judith N. Shklar and indicates the difference between cruelty and violence, highlighting the measures to prevent the emergence of atrocities in education and everyday life. Cruelty is a significant threat to the educational relationship for two reasons: it is a form of aggression and occurs mostly in a veiled or camouflaged form. In the chapter entitled "Parental Image in the Perception of Children from Divorced Marriages" Beata Pietkiewicz-Pareek presents the results of the study how a child in a divorced family perceives herself or himself and other family members. The issue of the family and its dysfunctions has been at the centre of interest of various social sciences for many years, despite the fact that it is an extremely difficult subject to explore, especially when it comes to researching the point of view of children. In the chapter "Parentification as a Process of Role Reversal in the Family" Wiktor Żłobicki presents the issue of parentification, i.e. the child undertaking tasks belonging to adults. As a result of role reversal in the family, a child sacrifices their own needs for the sake of the instrumental and/or emotional needs of the parent. Parentified children have to cope not only with duties exceeding their normal abilities, but also in adult life they experience the effects of the role reversal in the family. Wiktor Żłobicki continues this topic in the next chapter entitled "Performing the Professional Role by Teachers Who Experienced Reversing Roles in the Family". The aim of this article is to draw attention to possible disruptions in performing the professional role by teachers who experienced the role reversal in the family in their childhood. Studies confirm that people choosing, for example, the profession of a teacher, doctor, psychologist, psychotherapist or nurse, have often experienced parentification in their family of origin. This part of the book closes with Iwona Paszenda's text "Children's Everyday Creativity at School as an Inspiration for Action Research on Education of Pedagogy Students". The author presents the results of qualitative research realised based on the action research method. The main goal of the research was to develop the professional skills of pedagogy students through the practical implementation of 30-hour classes in creative thinking and action training and to examine the relationship between participation in training and acquiring professional skills. The results of the research showed that the mastery of creative skills by future educators may be the basic factor of their professional success.

The second part of the book, which consists of five chapters, is entitled “Religion, Pedagogy and Practice of Late Modernity”. This part opens with the text of Monika Humeniuk “Bruno Latour’s Theo-Ecologies and Eco-Theologies, or on the Pedagogical Potential of a Hybrid Language as an Inspiration for a Religious Pedagogy of Religion”. Bruno Latour’s ecotheological argument presented in the article is an interesting testimony to the hybridization of the language of science and the language of religion. According to the author it is worthwhile for the pedagogy of religion to reach to critical religious studies, because its theoretical potential could help integrate the topic of religion with new-materialist, post-secular, non-anthropocentric, post-humanist, and pro-ecological thought. The subject of Monika Humeniuk’s second text entitled “Between Orthodoxy and Heresy in the Pedagogy of Religion. The Hermeneutic and Aesthetic Inspirations by the Thought of Gianni Vattimo, Luigi Pareyson and Erika Fischer-Lichte” is a project of ‘weak’ pedagogy of religion. As the author points out poor ontology and radical hermeneutics become a strategy of opening the pedagogy of religion to heresy, i.e. ambiguity, polyphony of interpretation of texts, artefacts, and religious practices. As a consequence, the traditional pedagogy of religion gains the possibility of seeking inspiration for itself on new, non-theological borderlines of aesthetics and performativity. In the third chapter “Dimensions of Religious Fundamentalism in Theoretical Perspective” Rafał Włodarczyk reconstructs and reviews selected researcher positions that make up the theory of religious fundamentalism: religious studies researchers, sociologists, political scientists and philosophers, representatives of Western and Polish academic centres. The author sees as assets the differences and divergences between their positions. According to him, this offers a multifaceted and advanced understanding of the phenomenon, as well as an insight into which dimensions of this phenomenon is discussed and negotiated in the theory of fundamentalism. In her article “The Dynamics of Illiteracy Formation in India” Beata Pietkiewicz-Pareek presents the results of her own research on the problem of illiteracy in India, its causes and barriers to overcome, which have their basis in the patriarchal society. India is one of the fastest-growing countries in the world. At the same time, there are 272,700,941 illiterate people in India, most of whom are marginalized by factors such as poverty, gender, disability, and caste.

In the concluding chapter of the second part of book, “Between Stigma and Potential – Action Research in a Community Under Exclusion”, Hanna Achremowicz also presents the results of her own research. Her article presents the outcomes of pedagogical research in the socially excluded community of residents of a social hotel in Wrocław, focusing on their needs and potentials. Research conclusions indicated that the community was marked by a stigma, a result of living in a social hotel. The study was accompanied by animation activities based on the idea of empowerment, showing the hotel residents’ ability to act and organise.

It remains to be hoped that the texts of the researchers of the Department of General Pedagogy team collected in this volume, a result of many years of collaborative endeavours, will attract readers’ interest and arouse their cognitive curiosity.

Beata Pietkiewicz-Pareek, Rafał Włodarczyk

PART I

FAMILY, TEACHERS AND EVERYDAY EDUCATIONAL PRACTICE

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A FAMILY APART. THE CRISIS OF THE FAMILY IN POSTMODERNITY¹

ABSTRACT:

A crisis of values and pluralism in postmodern society have led to the family no longer being considered an essential value or an element of an unalterable social order. Individualistic attitude of postmodern man focused on self-realisation implied that the family should bring personal fulfilment, as well as satisfaction and pleasure. Frail human bonds, in particular, un-stable intimate relationships, are changing the family into a contract between free partners, a deal or a transaction that should provide for emotional and spiritual needs of the contracting parties.

KEYWORDS:

family, crisis of values, pluralism, individualism, postmodernity

The crisis of the family in postmodernity is the consequence of many transformations, for example the erosion of universal values and pluralism, individualism and the instability of interpersonal bonds. The above phenomena dilute the importance of the family, violate its continuity

¹ Originally published: Grażyna Lubowicka, "Rodzina osobno – o kryzysie rodziny w nowoczesności", *Wychowanie w Rodzinie* 2018, vol. XIX, no. 3, p. 143-156.

and deinstitutionalise it². The purpose of this text is to outline the change in the importance of the family in the context of the transformation of postmodern society, and above all in relation to the crisis of values and for the domination in this society of attitudes of individualism and the priority of self-realization.

In modernity, the family and marriage were considered to be the individual's basic mode of operation within society. As Krystyna Slany stressed, "in general one could not possibly live outside of marriage"³. Marriage determined an individual's social status, roles, functions and usefulness to society itself, and regulated areas such as daily life, household functioning and sexual activity. The family was a purely economic community, as Anthony Giddens confirms: "In pre-modern Europe, most marriages were contracted, not on the basis of mutual sexual attraction, but economic circumstance"⁴. Marriage was determined by economic motives and the choice of the partner often depended on the parents' decision. The family guaranteed economic or ontological security and defined the individual's position in society. According to Przemysław Wrochna, "This made the life of an individual a complete 'narrative'"⁵. Thus, the family both had an unquestionable importance as an institution and a top position in the hierarchy of values.

One of the signs of the crisis of the family in postmodernity is that it ceases to be a permanent, fixed and definitive social arrangement. The crisis affects the family as an institution, since its traditional model is being replaced by various forms of partnerships; it is becoming only one of the available options to choose from. Marriage is no longer mandatory and is no longer treated as an indispensable stage in a person's life. Postmodernity is also marked by a radical change in people's attitudes and

² The crisis of the family is the collapse of the importance of the family as a community in favour of its members' preference for their own self-fulfilment needs. Anthony Giddens writes about it in the book *The Transformation of Intimacy. Sexuality, Love and Erotism in Modern Societies* (Stanford 1992), which, referring to the relationships that are built in the family or in more detail in intimate relationships, describes them as 'confluent love' or 'pure relationships'.

³ K. Slany, *Alternatywne formy życia małżeńsko-rodzinnego w ponowoczesnym świecie*, Kraków 2002, p. 55.

⁴ A. Giddens, *The Transformation of Intimacy*, op. cit., p. 38.

⁵ P. Wrochna, "Intymność w stanie oblężenia", *Annales Universitatis Mariae Curie-Skłodowska. Sectio I, Philosophia – Sociologia* 2016, vol. 41, no. 2, p. 144.

approach to marriage, family, childrearing and divorce. Social consent to the dissolution of marriages and the multiplication of reasons for breaking off a relationship reinforce the conviction that divorce is natural. Family and marriage themselves are no longer the utmost values, which oblige people to make sacrifices. The character of bonds in the family is also changing; relationships are becoming looser, individualism is on the up and the importance of moral and religious norms is decreasing.

In the next part of this study, I will discuss the transformations of the family in the context of postmodern social phenomena and will distinguish the following threats: a crisis of universal, traditional values and the attendant crisis of the family as a value, pluralisation processes resulting in the relativisation and subjectivization of moral values, and individualism. Of particular importance for the crisis of the family is the last of the above phenomena, which makes self-realisation, being oneself and authenticity the key values for the individual; their consequence is the impermanence of interpersonal bonds⁶.

THE FAMILY AND THE CRISIS OF VALUES⁷

The family does not hold a high position in the hierarchy of values of the postmodern society. The reasons are the crisis of universal values and the attendant radical pluralism. The disruption of the code of ethical principles as normative foundations in the postmodern society means above all an absence in the convictions of individuals and in social standards of their traditional, objective hierarchy, which used to be dominated by moral (spiritual) and religious values. The axiological perspective adopted in postmodernity is thus characterised by the abandonment of an established code of ethical principles and an objective hierarchy of values.

⁶ On the causes of the erosion of traditional understanding of the family, see e.g.: A. Kwak, *Rodzina w dobie przemian. Małżeństwo i kohabitacja*, Warszawa 2005; A. Kwak, *Współczesne związki heteroseksualne: małżeństwa (dobrowolnie bezdzietne), kohabitacja*, Warszawa 2014; M. Majkowski, *Rodzina polska w kontekście nowych uwarunkowań*, Kraków 2010; K. Slany, *Alternatywne formy życia małżeńsko-rodzinnego w ponowoczesnym świecie*, op. cit.

⁷ I looked into the question of a value crisis in the text: G. Lubowicka, J. Maj, "Uniwersalne, tradycyjne wartości – kryzys czy zmiana?" (*Edukacja Etyczna* 2006, no. 12).

In the postmodernist concept, values are treated as something very fluid and changeable. Values change as reality changes and also depend on the changing attitude of the individual. According to Rorty, values are never absolute and universal. There is no fixed system of values external to man that determines norms and ways of behaviour. Usefulness is the criterion which accounts for the whole postmodern reality⁸.

The postmodern society is not based on traditional values. On the contrary, it is founded on a pluralism of worldviews rooted in democratic principles, the limits of which are set by laws enacted in democratic procedures. Therefore, no individual values considered as elements of a worldview can dominate it and should not constitute principles that are absolutely binding on the entire political community. As a result, the adoption or selection of values as the basis of behaviour or their validity is shifting into the private realm of individuals, limited by their own conscience, loyalty to their neighbours, tenets of morality, and rules of cooperation with other members of society. This pluralism of values in postmodernity consists, as Agnieszka Borowiak points out, in "the co-occurrence of incommensurable, sometimes even contradictory moral norms and the recognition of pluralism as a superior cultural value [...]"⁹.

Postmodernism not only abandons a search for moral principles that would transcend history and culture and strips values of their transcendental (in both secular and religious versions) universal nature but also relativises and subjectivises moral values. This abandoning of attempts to establish rigid, timeless ethical codes (aspiring to be universally binding) and an objective hierarchy of values contributes to the personalisation, individualisation of morality, subjectivisation of the choice of values, and as a consequence intensifies their pluralism. The crisis of values in postmodernity means therefore the lack of universal recognition for traditional, higher or spiritual, values. This is aptly defined by Janusz Mariański:

⁸ M. Miczyńska-Kowalska, *Wartości w postmodernizmie. Koncepcja dekonstrukcji rzeczywistości społecznej – analiza krytyczna*, Lublin 2013, p. 47.

⁹ A. Borowiak, "Ponowoczesna etyka i ponowoczesna tolerancja", [in:] *Tolerancja i wielokulturowość. Wyzwania XXI wieku*, ed. A. Borowiak, P. Szarota, Warszawa 2004, p. 40.

In stable, traditional societies with uniform value bases of a religious and moral nature, there was a consensus on basic values and their order. In open, pluralistic societies, the situation becomes completely different and most of them today are becoming individualistic societies. Such societies are characterised by individual understanding of values and subjectivisation of lifestyles, worldviews and morals. Scepticism about binding and shared ideals, relativism in religious and philosophical matters and moral nihilism are widespread¹⁰.

The crisis of values in postmodern society is further aggravated by the crisis of a tradition which is passed on from one generation to another and perpetuates the past shared culture with its values and moral norms. The departure from the ordered world of values, rejection of the system of social control, lack of shared and universally binding values in post-traditional societies and individualised criteria of value selection strip human interactions and actions of regulators and signposts, 'certainties', stable guidelines, and a sense of obligation. The status and significance of the family in modernity upheld the world of late modernity, which, as Katarzyna Suwada notes, "was based on the pursuit of order, on defining reality [...]"¹¹. The idea of social order sustained by the community and the institutions of the state has given way to an ambiguous reality. "Reflexivity is to replace tradition and customs, social order suddenly begins to depend on the choices of individuals rather than on universal norms"¹². Consequently, attempts to establish a code of universal ethical principles, regulating the behaviour and moral attitudes of individuals, are abandoned once and for all as such a canon is nowhere to be found. Timeless values have lost their meaning because they are not upheld by tradition, authorities or the community, which have also been deprived of their binding force. The moral order has been disrupted.

The collapse of universal values as normative principles, the loss of the conviction of their binding role in action, the irrelevance of

¹⁰ J. Mariański, *Religia w społeczeństwie ponowoczesnym. Studium socjologiczne*, Warszawa 2010, p. 22.

¹¹ K. Suwada, "Jak nazwać współczesność? Problem konceptualizacji płynnej nowoczesności Zygmunta Bauman, drugiej nowoczesności Ulricha Becka i późnej nowoczesności Anthony'ego Giddensa", *Kultura i Edukacja* 2007, no. 3, p. 43.

¹² *Ibidem*, p. 44.

‘thinking according to values’, which no longer constitutes a basis for commitment, has resulted in the disappearance of the very value of the family and of sacrifice in its name, as well as of the sense of commitment that underlies personal decisions. This disbelief in timeless values is linked to the destruction of the traditional social order in which the family held a privileged place. The crisis of family values is accompanied by deinstitutionalisation; the institution of marriage and the family in the current model is being criticised and relaxed, which makes it assume new forms (partnership, cohabitation or same-sex marriages). The institution of marriage no longer belongs to the immutable and sacred social order but rather becomes an object of free choice.

The lack of respect for values and for the institution of the family itself is strengthened not only by postmodern pluralism, but also by individualisation and a sense of freedom seen as a possibility to make choices and decisions on one’s own.

We can therefore claim to deal with multiple moralities in a pluralistic reality. Their normative criteria often overlap, diverge or even contradict each other. This plurality of moralities not only prevents an unambiguous evaluation of the moral actions of other subjects but also undermines the certainty of our own moral choices. Postmodern freedom deprives us of permanent and universal principles and thus of the possibility of achieving a universal order based on morality¹³.

A lack of preferred values and the fact that all beliefs and values are equal implies the consent for the coexistence in social space of behaviours that will refer to other systems of evaluation and values than those professed by a given individual. According to Borowiak, morality has been individualised and privatised and is subject to free and unrestricted choices:

The idea of conformity of conduct to an established code of ethics is replaced by understanding ethics as the domain of emotions and feelings,

¹³ M. Korzewski, “Wolność a odpowiedzialność, czyli o prawie i moralności w ponowoczesności”, *Kultura i Społeczeństwo* 2002, vol. 46, no. 3, p. 17.

from which moral sensitivity grows. [...] Instead of relying on authorities, postmodernists suggest that we should act in accordance with our own moral intuition, as it allows us to build up attitudes of compassion and empathy, and thus sources of behaviour and moral attitudes¹⁴.

A worldview and concept of the good that are created and chosen by the individual in an autonomous and free manner enhance a liberal approach to understanding the family and contribute to an emergence of its diverse forms.

THE FAMILY IN THE FACE OF INDIVIDUALISATION

Individualism is a distinctive feature of postmodernity. It elevates individuals, emancipates them, gives them autonomy, supports their sense of self, and offers numerous tools and ways of self-realisation. According to Agata Dziuban

Late-modern 'individualised society' [...] is a society of autonomous individuals, making their own decisions about their own lives, biographies, work, interests and values. Here collective determinants and traditional frames of reference are becoming less important¹⁵.

Individualisation, on the one hand, is understood as the freedom to decide for oneself, to develop oneself independently and to fulfil oneself. It is also an emancipation from traditional social ties and social conditions that have so far limited the autonomy of the individual. On the other hand, individualisation contributes to the disintegration of traditional communities and the breakdown of social bonds. Focusing on working on one's own identity leads to the realisation of personal freedom, independence, decision-making, which allow individuals to decide about themselves and their everyday life, to be free to express themselves and to be free from external pressure or coercion that limit self-expression and growth of the individual self.

¹⁴ A. Borowiak, "Ponowoczesna etyka i ponowoczesna tolerancja", op. cit., p. 40.

¹⁵ A. Dziuban, *Gry z tożsamością. Tatuowanie ciała w indywidualizującym się społeczeństwie polskim*, Toruń 2013, p. 20.

For Giddens, individualism as a focus on the self and on the creation of one's own identity, as autonomy and as the multiplicity of possibilities according to which the individual can make numerous choices, has an impact on interpersonal relations and especially on the sphere of intimacy. Intimacy is a relationship that is strictly personal, close and intense, the essence of such forms of human interaction as friendship, romantic and erotic love, as well as marriage and the family. Relationships in which both parties strive for self-fulfilment and self-creation are special in that the partners affirm their identities in them. As Agnieszka Dziuban notes,

a relationship is not only a space of an intimate bond with the other, but also a platform of developing and negotiating one's own identity. This is because the main aim of being in such an intimate relationship is self-realisation seen as being authentic with the other¹⁶.

Intimate relationships are supposed to contribute to an individual's self-creation and are therefore freely chosen. Self-realisation in the form of reflexive projects makes interpersonal bonds open and optional. This aspect makes "individuals are now confronted with an endless series of choices as part of constructing, adjusting, improving or dissolving the unions they form with others"¹⁷; moreover, traditional principles and ideas concerning relationships cease to bind. In line with Giddens's observations, "It is characteristic of modern systems of sexual intimacy and friendship that partners are voluntarily chosen from a diversity of possibilities"¹⁸. The result is the trivialisation of human relationships. Marriage loses its binding character and individuals in intimate relations do not recognise the need for basing them in law.

Individualism and a sense of freedom trigger a belief in the value of pleasure and personal satisfaction, to be realised in interpersonal relationships and in the family. As a result of this thinking, the family becomes not so much a duty, a task to be performed, but a source of satisfaction. Relationships, marriage and the family are subordinated

¹⁶ Ibidem, p. 72–73.

¹⁷ A. Giddens, *Sociology*, Cambridge, Malden 2009, p. 373.

¹⁸ A. Giddens, *Modernity and Self-Identity. Self and Society in the Late Modern Age*, Cambridge 1991, p. 87.

to the egoistic pursuit of 'the enjoyment of life' and to the strategies applied by individuals, with covert narcissism and an instrumental treatment of others. According to Zygmunt Bauman:

If the partner in partnership is 'conceptualized' in such terms, then it is no longer the task of both partners to 'make the relationship work' - to see it work through thick and thin, 'for richer for poorer', in sickness and in health, to help each other through good and bad patches, to trim if need be one's own preferences, to compromise and make sacrifices for the sake of a lasting union¹⁹.

These diagnoses are elaborated on by Scott Lash in *Reflexive Modernization*²⁰. In his view, relationships involve the cult of being free to be oneself, their vital aspect being not so much reflexivity as an exchange of meanings, defined by the author as an 'intense semantic interchange' between partners, an exchange which creates a shared 'semantic horizon'²¹.

THE FAMILY AND THE FRAGILE HUMAN BONDS

According to Zygmunt Bauman, we now know that "all relationships are 'pure' (that is: frail, fissiparous, unlikely to last longer than the convenience they bring, and so always 'until further notice')"²². The model of a lasting and permanent relationship is being replaced by partnerships that can be revoked at will. Especially characteristic of postmodern bonds is the the so-called pure relationship described by Anthony Giddens²³. According to the scholar, this is

a relationship liberated from coercion, external obligation and responsibility, [...] sustained on the initiative and for the pleasure or benefit of the

¹⁹ Z. Bauman, *Liquid Modernity*, Cambridge 2000, p. 164.

²⁰ U. Beck, A. Giddens, S. Lash, *Reflexive Modernization. Politics, Tradition and Aesthetics in the Modern Social Order*, Stanford 1994, p. 110-173.

²¹ Ibidem, p. 204.

²² Z. Bauman, *Liquid Love. On the Frailty of Human Bonds*, Cambridge 2008, p. 90.

²³ A. Giddens, *Modernity and Self-Identity*, op. cit., p. 87-88.

parties involved and only as long as they are satisfied with it. A pure relationship, then, is a relationship that is potentially impermanent²⁴.

Unlike the bonds in traditional societies (which rely heavily on external factors), a pure relationship is founded on a free participation of its members²⁵. Today's relationship

becomes more and more a relationship initiated for, and kept going for as long as, it delivers emotional satisfaction to be derived from close contact with another. Other traits – even such seemingly fundamental ones as having children – tend to become sources of 'inertial drag' on possible separation, rather than anchoring features of the relationship²⁶.

The value of a pure relationship lies in "what the relationship can bring to the partners involved"²⁷ and participation depends on the level of satisfaction obtained in the relationship. It is satisfaction (satisfying the partner's needs and expectations) is of fundamental value in a given relationship; other factors are clearly secondary. Giddens stresses that 'pure relationship' "refers to a situation where a social relation is entered into for its own sake, for what can be derived by each person from a sustained association with another [...]"²⁸. A 'pure relationship' is in a way a transaction in which both parties invest their own resources and expect the other party to meet their obligations in the profit and loss account. Partners in a relationship are then equal and free entities and the relationship itself is informed by partnership and respect of each party. The purity of the relationship lies in the fact that its shape and specificity depend primarily on the individuals involved rather than on external regulations and orders. According to Giddens, relationships allow individuals to achieve freedom from social conventions (for example, the need for marriage or traditional family forms), and cohabitation now appears as a subject of discussion and agreement²⁹.

²⁴ A. Dziuban, *Gry z tożsamością*, op. cit., p. 72.

²⁵ P. Wrochna, "Intymność w stanie oblężenia", op. cit., p. 42.

²⁶ A. Giddens, *Modernity and Self-Identity*, op. cit., p. 89.

²⁷ Ibidem, p. 90.

²⁸ A. Giddens, *The Transformation of Intimacy*, op. cit., p. 58.

²⁹ See ibidem, p. 187–189.

The bond in the modern family is above all a personal (as well as emotional) one and therefore it is less enduring than the bond in the traditional family. It depends not so much on the objective basis of fulfilling structurally imposed duties as on the subjective feeling of satisfying one's own emotional needs. Zygmunt Bauman emphasises that "An unprecedented fluidity, fragility and in-built transience (the famed 'flexibility') mark all sorts of social bonds [...]"³⁰. In postmodernity, intimate bonds are fragile and ephemeral, and their flexibility, fluidity or openness is evident in the forms of interpersonal relationships. The sustainability of relationships depends on how much satisfaction marriage and family offer and on the recognition of whether giving up the relationship will entail the loss of important investments. The institution of marriage is no longer seen as the only way to achieve happiness because of potential alternative relationships, such as cohabitation. The contemporary transformation of intimacy materialises not only in the 'content' of the relationship itself, its various forms, but may also lead to the abandonment of such relationships and the increasingly attractive option of being single, i.e. a conscious choice to live alone.

THE FAMILY APART

The term 'crisis' used in reference to the changes the family has experienced in postmodernity implies a loss of the significance and status attributed to it in modernity. Back in the day, the family held a high position in the hierarchy of values, which involved sacrifice and entailed certain obligations. As an institution, it was an element of an objective moral and social order which was independent of the individual. It was an obligatory stage of life and determined social roles and identities. The crisis of values, social pluralism and the spread of individualism in the postmodern society have altered the status of the family. It is still seen as an important value, yet is no longer considered a universal, supra-individual moral norm but as a determinant of self-realisation and therefore a value which can be chosen at will.

³⁰ Z. Bauman, *Liquid Love*, op. cit., p. 91.

The family thus belongs to the individual's chosen moral preferences, goals, aspirations, and life projects. It is subordinated to the understanding of happiness and life satisfaction. It is a space for self-realisation of individuals focused on an independent construction of identity or their own biography. As a consequence, it ceases to be a value in itself, a good shared by all of its members, and instead is an opportunity for the self-realisation of the partners, but separately. The family is increasingly perceived as a subject of a decision, a negotiation, an agreement, a transaction in which the emotional, spiritual and intellectual interests and common horizons of meanings of both partners are to be secured. It is considered as a transaction that can be terminated after an analysis of the profit and loss account. The family subordinated to the realisation of individual aspirations of each of its members is no longer a stable and sustainable institution. The family is not a value in itself, but a means for obtaining satisfaction from one's own life, shared with others for this very purpose.

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***ANTIGONE'S CLAIM. NORM AND NON-NORMATIVE MODEL OF THE FAMILY BY JUDITH BUTLER*¹**

ABSTRACT:

Judith Butler's problems in *Antigone's Claim* concern a decomposed and diverse family in postmodernity or a family subjected to deformations and displacements, and the question about which model(s) the family may be heading. The traditional family model based on the primacy of the heterosexual matrix of family and sexuality is deconstructed by Butler by unmasking the basic prohibition of homosexuality for culture and based on the assumption that interpersonal bonds are generated in a historical social space. Butler proposes a new relationship ontology in which human lust is not governed by the imperative of heterosexuality.

KEYWORDS:

Antigone, family, performativity, cultural norm

The transformation of the family model in postmodernity dislodges the privileged position of the monogamous family based on marriage between a man and a woman and proliferates its various models. Along

¹ Originally published: Grażyna Lubowicka, "Żądanie Antygony. Normy i nienormatywny model rodziny Judith Butler", *Wychowanie w Rodzinie* 2019, vol. XXI, no. 2, p. 373-383.

with the multiplicity of family models and the freedom of their formation, feminist discourse proposes emancipatory actions that would lead to equality of choice of the family pattern regardless of gender configuration, and even introduce a revolution in the very understanding of the family. Such a revolution is proposed by Judith Butler, who replaces the notion of family with a much broader one of kinship. She attempts to re-evaluate the family model in her book *Antigone's Claim. Kinship Between Life and Death*, in which Antigone comes to the fore with her claim to recognise natural law, or the law of the family, before social law². Butler offers her diagnosis of the current state of the family:

Consider that in the situation of blended families, a child says 'mother' and might expect more than one individual to respond to the call. Or that, in the case of adoption, a child might say 'father' and might mean both the absent phantasm she never knew as well as the one who assumes that place in living memory. The child might mean that at once, or sequentially, or in ways that are not always clearly disarticulated from one another. Or when a young girl comes to be fond of her stepbrother, what dilemma of kinship is she in? For a woman who is a single mother and has her child without a man, is the father still there, a spectral 'position' or 'place' that remains unfilled, or is there no such 'place' or 'position'? [...] Is the father absent, or does this child have no father, no position, and no inhabitant? Is this a loss, which assumes the unfulfilled norm, or is it another configuration of primary attachment whose primary loss is not to have a language in which to articulate its terms? And when there are two men or two women who parent, are we to assume that some primary division of gendered roles organizes their psychic places within the scene, so that the empirical contingency of two same-gendered parents is nevertheless straightened out by the presocial psychic place of the Mother and Father into which they enter? Does it make sense on these occasions to insist that there are symbolic positions of Mother and Father that every psyche must accept regardless of the social form that kinship takes?³.

² The word 'kinship' in Polish means ties, kinship, kinship ties. Judith Butler uses this expression to emphasise its meaning broader than the concept of family. On the different forms of kinship in different cultures see D. Jabłoński, L. Ostasz, *Zarys wiedzy o rodzinie, małżeństwie, kohabitacji i konkubinacie. Perspektywa antropologii kulturowej i ogólnej*, Olsztyn 2001.

³ J. Butler, *Antigone's Claim*, New York 2000, p. 69.

Butler proposes an ever more far-reaching deconstruction of the traditional family model than that typical of the shifts in the postmodern society.

The question of a decomposed and diversified family in postmodernity or a family subject to deformation and displacement and the question of what model(s) it might be heading is put by Judith Butler in *Antigone's Claim* as follows:

what sustaining web of relations makes our lives possible, those of us who confound kinship in the rearticulation of its terms? What new schemes of intelligibility make our loves legitimate and recognizable, our losses true losses? This question reopens the relation between kinship and reigning epistemes of cultural intelligibility, and both of these to the possibility of social transformation. And this question, which seems so hard to ask when it comes to kinship, is so quickly suppressed by those who seek to make normative versions of kinship essential to the working of culture and the logic of things, a question too often foreclosed by those who, from terror, savor the final authority of those taboos that stabilize social structure as timeless truth⁴.

Therefore, "which social arrangements can be recognized as legitimate love, and which human losses can be explicitly grieved as real and consequential loss?"⁵.

Addressing the problem of the family, its current status, i.e. its crisis, the destruction of its traditional form and its extension to different models and gender configurations, which is mainly the result of the collapse of the monogamous heterosexual family, I refer to Judith Butler's reflections on the family, its model, its determinants, and its evolution presented in *Antigone's Claim*. Judith Butler's approach to the problem of family stems from her engagement with feminist theories, complemented by poststructuralism (gender constructivism), more specifically performativity, and psychoanalysis, mainly as practiced by Jacques Lacan. What is the family model proposed by Butler, where bonds based on heteronormative norms are replaced by kinship relations? Referring to Butler's ideas, I will outline how the postulates

⁴ Ibidem, p. 24–25.

⁵ Ibidem, p. 24.

of expanding the family model derive from social and cultural theory and, within it, from the concepts of the formation of cultural norms and normativity. What role in the concept of normativity and normalization does the character of Antigone, the heroine of Sophocles' drama of the same title, play? The text is an illustration of postmodern and feminist thesis about the social and cultural shaping of normativeness. The author of *Antigone's Claim* maintains that family relations standards are created and consolidated by repeating aberration performative acts.

ANTIGONE AND HER CLAIM

Antigone, a literary figure, has for many readers and interpreters of Sophocles' tragedy been a symbol of civil disobedience. However, the figure of Antigone has also been emblematic of feminist activism, of feminist, *gender*, and *queer* criticism, providing a role model. Who is Antigone for Judith Butler?

Sophocles' heroine is a representative of a family; she is connected to Oedipus, her father, to Eteocles and Polynices, to her brothers, to Ismene, her sister, by 'blood ties', but, as Butler shows, "hardly represents the normative principles of kinship, steeped as she is in incestuous legacies that confound her position within kinship"⁶. Butler makes a reference to another tragedy by Sophocles, *Oedipus at Colonus*, where Antigone and Ismene are offered the male *gender*⁷. In the tragedy, Oedipus repeats that, as Butler notes,

Ismene and Antigone have quite literally taken the place of their brothers, acquiring masculine gender along the way. [...] And so we've arrived at something like kinship trouble at the heart of Sophocles. Antigone has, then, already taken the place of her brother; [...] By the time this drama is done, she has thus taken the place of nearly every man in her family⁸.

⁶ Ibidem, p. 2.

⁷ "If I had not begotten these daughters to attend me, I would not be living, for all you did for me. But as it is they preserve me, they are my nurses, they are men, not women, when it comes to working for me; but you are sons of some other, and no sons of mine" (Sophocles, *Oedipus at Colonus*, Cambridge 1994, 1559–1563).

⁸ J. Butler, *Antigone's Claim*, op. cit., p. 62.

Butler stresses that we deal here with mix-up of roles within the family. Antigone is taking the place of nearly all family members. By not belonging to a particular *gender*, by having ambiguous family relations, Antigone does not belong to any known and constituted order, she does not represent any norm. She is doomed to fail in the space of universal norms and laws and becomes a figure of the excluded. Butler writes of her:

Although not quite a queer heroine, Antigone does emblemize a certain heterosexual fatality that remains to be read. Whereas some might conclude that the tragic fate she suffers is the tragic fate of any and all who would transgress the lines of kinship that confer intelligibility on culture, her example, as it were, gives rise to a contrary sort of critical intervention: What in her act is fatal for heterosexuality in its normative sense? And to what other ways of organizing sexuality might a consideration of that fatality give rise?⁹.

For Butler, an example of such transgression of sanctioned family relations, being taboo as incest, is the taboo of homosexuality developed in the heteronormative discourse. Antigone, then, may come to symbolize those excluded whose desire is deemed illegitimate in a given culture.

Furthermore, as Butler explains, Antigone's family itself transgresses the norms set for her by familial relationships. She is the daughter of Oedipus and Jocasta, born of an incestuous relationship, given to impossible incestuous love for her brother, irrevocably condemned to death for her attempt and claim to bury him, to mourn and to grieve. "In her act, she transgresses both gender and kinship norms [...]"¹⁰. Through the character of Antigone in her non-normative family relationships, Butler shows the mutability of social forms of family relationships. The heroine herself also belongs to a deformed family: "Antigone represents not kinship in its ideal form but its deformation and displacement"¹¹. Antigone transgresses the norms of family and gender, revealing at the same time the nature of these norms, their formation and reiteration. Butler makes the heroine of Sophocles' tragedy shown in non-standard

⁹ Ibidem, p. 72.

¹⁰ Ibidem, p. 6.

¹¹ Ibidem, p. 24.

family relations the starting point for analysing the social constitution of norms, and with them the setting of the border and exclusion, for the analysis of normativity itself or the normalization of the process of understanding the family model. As Butler emphasizes: "Antigone represents neither kinship nor its radical outside but becomes the occasion for a reading of a structurally constrained notion of kinship in terms of its social iterability, the aberrant temporality of the norm"¹². Antigone's behaviour, then, is meant to be an illustration of the subordination of cultural norms, their repetition and embodiment and, at the same time, their deformation and displacement.

NORMS AND NORMALISATIONS OF THE FAMILY MODEL

In her analyses of the family model based on changing norms and regulations, Judith Butler, as well as the broad feminist discourse, relies on the postmodern assumption of socio-cultural conditioning, and with it the boundary and the prohibition, separating what is normal and natural, separating the natural family model and what is outside the norm, and is therefore an aberration. As Butler observes: "I hope to show how one might reapproach the kinship-founding function of the incest taboo within psychoanalysis with a conception of a contingent social norm at work"¹³. When analysing culture, we always encounter norms defining what is proper, normal, right and even moral and what is an aberration, a deviation from the norm or something unusual. Culture creates the norm and at the same time creates prohibitions and boundaries and then regulations related to what is non-normative, separating and excluding those who break out of the existing paradigms and rules of conduct. Culture and cultural norms normalize those who deviate from the patterns or exclude them. Postmodern thought and feminist discourse always emphasize that culture provides norms and rules of conduct, while at the same time creating exclusionary systems based on non-normative behaviour. Although patterns and norms are changeable and subject to modification, they are treated as fixed,

¹² Ibidem, p. 29.

¹³ Ibidem, p. 30.

unchanging and natural. In Butler's view, even if cultural norms are based on biological premises or prohibitions-taboos, such as the incest taboo, one cannot derive from them the conclusion that norms are naturally based in the order of things and thus they cannot be regarded as unquestionable. As Joanna Hańderek notes in her study in the book *Wykluczenia* (*Exclusions*):

We also often forget that the minority, like the majority, is recognized and constituted by people. Therefore the norms and cultural categories, or traditions, invoked by people who exclude the minority are established and produced over generations. By speaking of sound principles or natural law, [...] a mythologization of the majority and its peculiar sanctification is made, giving it the status of supremacy¹⁴.

How, then, do family relations take on some specific form sanctioned by law? The way social norms are established and changed is described by Butler in the context of feminist discourse, where she takes a constructivist stance on the concept of gender or, more broadly, the concept of subjectivity and its identity.

Butler emphasizes that the basic pattern and source of norms concerning the family is the assumption of heteronormativity, a cultural order that assumes that the only legitimate rule of human sexual life is the relationship between a man and a woman. For feminist discourse, heteronormativity is the dominant cultural matrix that determines how sexuality is used and consequently defines the family model. Legal conditions favour the heteronormative relationship, reproduced via practice and socialization. However, as Butler and feminist discourse have it, it is not an intrinsic, natural disposition, but merely a norm determined by cultural practice, perpetuated and reinforced through multiple social gratifications. These norms are reinforced by the ongoing reproduction of social behaviour and they then merge with the conditioning of power, which transforms normativity into normalisation, and are ultimately legitimized by the state and its institutions. As Ewa Majewska writes: "Yet the subject is not 'naturally' heterosexual, the construction of the

¹⁴ J. Hańderek, "Wokół wykluczenia", [in:] *Wykluczenia*, ed. J. Hańderek, N. Kućma, Kraków 2017, p. 26.

'prohibition of sexuality' is also a product of culture, so fundamental that it predates gender difference"¹⁵. Based on her interpretation of Antigone's actions in Sophocles' tragedy, Butler outlines how the cultural norm of the family and the law derived from prohibition is shaped, and simultaneously how there is a shift in the family model and a shift in the law as a new invariant of the social organization of sexuality: "What happens when the perverse or the impossible emerges in the language of the law and makes its claim precisely there in the sphere of legitimate kinship that depends on its exclusion or pathologization?"¹⁶.

The way in which social norms are established, which the interpretation of Sophocles' tragedy is meant to illustrate, is for Judith Butler related to her poststructuralist theory of performative acts. This concept originates in the theory of cultural gender performativity, which belongs to the feminist discourse. According to this theory, gender appears as a socio-cultural construct, a product of repeated social practices, a process of repetition and enactment of cultural representations of masculinity and femininity. The subject or identity of which gender is a part becomes a forced repetition of the norm and is the result of repeated normative acts.

Judith Butler is a representative of the performative turn, derived from John Austin's modified speech act theory, which pointed to the connection between speaking and acting, claiming that speech has performative power. Performativity assumes that language not only represents reality, but causes changes in it, specific utterances or behaviours themselves are normalising. Social norms (and cultural gender) are thus the result of the forced repetition of certain actions, their reiteration. At the same time this discourse/action is subordinated to authority. In this sense, the norm is a social contract, a construct. The subject makes use of the discourse that they have inherited and in which performativity is a constant reiteration of certain behaviours, which have already been established. In Butler's theory there is no place for a pre-discursive sphere, everything is a construct and functions within discourse; there is no pre-discursive sphere, understood in an essentialist way¹⁷.

¹⁵ E. Majewska, *Feminizm jako filozofia społeczna: szkice z teorii rodziny*, Warszawa 2009, p. 204.

¹⁶ J. Butler, *Antigone's Claim*, op. cit., p. 68.

¹⁷ "Such acts, gestures, enactments, generally construed, are *performative* in the sense that the essence or identity that they otherwise purport to express are *fabrications*

Furthermore, the norms of family relations are not derived from natural, biological conditions. Butler refers here to Foucault's category of discourse as a normative regulative force producing subjects. Performative acts bring norms into view and perpetuate them, organizing and regulating social life, enshrining them in the bodies of subjects. Butler moreover finds important Foucault's thesis that the subject is under the dominion of power discourse and subjected to a series of exclusions.

Butler notes that

Foucault points out that juridical systems of power *produce* the subjects they subsequently come to represent. Juridical notions of power appear to regulate political life in purely negative terms—that is, through the limitation, prohibition, regulation, control, and even 'protection' of individuals related to that political structure through the contingent and retractable operation of choice. But the subjects regulated by such structures are, by virtue of being subjected to them, formed, defined, and reproduced in accordance with the requirements of those structures¹⁸.

The authority creates a discourse in which the subjects' action is possible, also in a negative way (the authority oppresses the individual and does not offer a choice of free action or does not create a possibility of action at all), which in Foucault's terms is the mechanism of subjugation of the subject¹⁹. The subject is, on the one hand, a product of authority, and on the other, a necessary condition for the occurrence of authority. Butler explains this aspect of Foucault's thought in more detail: "Subjection is, literally, the *making* of a subject, the principle of regulation according to which a subject is formulated or produced. Such subjection is a kind of power that not only unilaterally acts on a given individual as a form of

manufactured and sustained through corporeal signs and other discursive means. That the gendered body is performative suggests that it has no ontological status apart from the various acts which constitute its reality. This also suggests that if that reality is fabricated as an interior essence, that very interiority is an effect and function of a decidedly public and social discourse [...]" (J. Butler, *Gender Trouble. Feminism and the Subversion of Identity*, New York, London 2007, p. 185).

¹⁸ Ibidem, p. 2–3.

¹⁹ "This 'subjection' or *assujettissement* is not only a subordination but a securing and maintaining, a putting into place of a subject, a subjectivation" (J. Butler, *The Psychic Life of Power. Theories in Subjection*, Stanford 1997, p. 90–91).

domination, but also *activates* or forms the subject”²⁰. The manufactured subject is simultaneously regulated or subjugated, and the forced repetition is a form of regulation, a repetition that embodies the normative ideal.

Through her actions, Antigone makes a claim to transform the cultural norm of the family model, challenging its heteronormative structure. Judith Butler shows how she becomes entangled in family relationships while remaining outside of these norms; she transgresses heterosexual norms and the limitations of family relationships. Antigone does not achieve a sexuality other than the heteronormative one, yet she rejects it. She rejects the role of mother and wife, revealing her ambiguous gender. The actions of Sophocles’ heroine reveal the mutability of social forms of family relationships²¹. In her analysis of Butler’s discussion of Antigone, Ewa Majewska observes: “From the perspective of considerations about the family, of essence here is the disruption of traditional distributions and the establishment of new ties that may be considered contrary to those accepted as the norm”²²; once a norm has been culturally created and established, it can be shaped anew. Change is possible only within the cultural context in which the individual finds himself; the individual invariably remains entangled in a system of meanings imposed by the normative-regulatory practice. However, change in the process of forced repetition becomes the effect of resistance, and therefore destabilisation, aberration, ceasing to be a simple repetition, and therefore a reproduction and reinforcement of domination. Antigone in Butler’s interpretation is to be such a character (subject) through resistance initiating change. The subject’s capacity for action must therefore be sought in variation, repetition. Butler claims:

If the rules governing signification not only restrict, but enable the assertion of alternative domains of cultural intelligibility, i.e., new possibilities for gender that contest the rigid codes of hierarchical binarisms, then it is only *within* the practices of repetitive signifying that a subversion of identity becomes possible. [...] The coexistence or convergence of such discursive injunctions produces the possibility of a complex reconfiguration and redeployment²³.

²⁰ Ibidem, p. 84.

²¹ See E. Majewska, *Feminizm jako filozofia społeczna*, op. cit., p. 213.

²² Ibidem, p. 214.

²³ J. Butler, *Gender Trouble*, op. cit., p. 198–199.

FAMILY AS KINSHIP

Butler deconstructs the traditional family model based on the primacy of the heterosexual matrix of family and sexuality in the language of feminist theories, and instead proposes an ontology of kinship in which human desire is not governed by the imperative of heterosexuality. As Ewa Majewska shows in her analysis of Butler's ideas, the concept of kinship makes it possible to see and recognize non-traditional forms of the family, to oppose the perpetuation of certain cultural norms, and to open the possibility of their transformation.

Butler's concept appears from this perspective as the most open to social change, already described by sociologists in their studies of new forms of family. Therefore, it opens up opportunities for the emancipation of those family forms that are marginalized in society, that is, all non-traditional kinship patterns²⁴.

According to Butler's assumption of performativity, the family is a set of specific practices that also complement Antigone's actions it is a set of relations renewed over time as a result of being repeated: "Kinship is what she repeats through her action; to redeploy a formulation from David Schneider, it is not a form of being but a form of doing"²⁵. Antigone's action as an aberrant repetition of a norm, a custom, a convention in the cultural sphere leads to change and to the undermining of the existing order. Butler emphasizes that this change begins with a claim, a demand that Antigone makes that is both action and speech, establishing aberration at the heart of the norm. Butler asks:

my question is whether it can also become the basis for a socially survivable aberration of kinship in which the norms that govern legitimate and illegitimate modes of kin association might be more radically redrawn. [...] What happens when the perverse or the impossible emerges in the language of the law and makes its claim precisely there in the sphere of legitimate kinship that depends on its exclusion or pathologization?²⁶.

²⁴ E. Majewska, *Feminizm jako filozofia społeczna*, op. cit., p. 213.

²⁵ J. Butler, *Antigone's Claim*, op. cit., p. 58.

²⁶ Ibidem, p. 67, 68.

In the context of the performative act theory, the modification of norms occurs in the course of their aberrant repetition, so that the engine of change is the conscious distortion of norms and the very possibility of their being conceived differently. Butler takes a feminist perspective on the radical reformulation of family relations that provides a basis for the possible extension of the legitimacy of various forms of family ties, without reducing kinship relationships to a normative model of the family. Family relationships constitute a variable system responsible for the organization of the reproduction of material life, for the ritualisation of birth and death. These relationships guarantee the existence of intimate ties and regulate sexuality through specific sanctions and prohibitions. Butler's aspiration, in line with emancipatory currents of feminism, is to legitimize extra-normative families.

In her *Antigone's Claim*, Butler mentions examples of remodelling the family structure, such as the struggle to legitimize the African American model of family relations described by Carol Stack in *All Our Kin*. In this family arrangement, mothers, grandmothers, aunts, sisters, and friends work together to raise children and ensure the reproduction of material living conditions. Other radical family or kinship relationships are described by Kath Weston in *Families We Choose*, where blood ties are contrasted with relationships based on voluntary decision. Kinship relationships that transcend the normative family model also include voluntary single parenting, gay or lesbian parenting, and parenting arrangements involving more than two adults. Thus, Butler argues, the symbolic place of the mother may be occupied by several people or people of different genders, for it is not identifiable with a particular person. Butler asks:

Do we say that families that do not approximate the norm but mirror the norm in some apparently derivative way are poor copies, or do we accept that the ideality of the norm is undone precisely through the complexity of its instantiation?²⁷.

The families that approximate the norm are a model with a maximum differentiation of roles and which according to Butler should be

²⁷ Ibidem, p. 78–79.

accepted and promoted. For this to happen, it must first be expressed and thought, it must coexist with cultural intelligibility. The method of introducing this cultural intelligibility is precisely the repetition of scandal and aberration, thanks to which what cannot be expressed nevertheless comes to the fore.

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CRUELTY, VIOLENCE AND EDUCATION BY MICHEL DE MONTAIGNE. AN ESSAY ON PEDAGOGICAL DEONTOLOGY¹

ABSTRACT:

The aim of this paper is to analyse the phenomenon of cruelty according to pedagogical deontology. Cruelty is a significant threat to the educational relationship for two reasons: it is a form of aggression and occurs mostly in a veiled or camouflaged form. The author refers to concepts of cruelty by Michel de Montaigne and Judith N. Shklar and indicates the difference between cruelty and violence and highlights the measures to prevent the emergence of atrocities in education and everyday life.

KEYWORDS:

cruelty, aggression, violence, education, pedagogical deontology

*...violence is nothing more
than the most flagrant
manifestation of power*

Hannah Arendt, *On Violence*

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We show our ingenuity only
by ill-treating ourselves

Michel de Montaigne, *Essays*

Taking up the issue of cruelty on the grounds of pedagogical deontology, i.e. studies focused on recognizing the duty and moral obligations of educators, we accept as settled the problem of evaluating aggression. The available knowledge concerning the occurrence of aggression in educational practice allows us to claim that its presence in the process of upbringing can be justified yet cannot be morally pardoned from the point of view of pedagogy². Still, we should be mindful of the fact that pedagogical deontology continues to face unresolved theoretical issues when analysing violence. The disputes over definitions that we can find in the relevant literature, resulting mainly from difficulties in defining the scope of the phenomena, make the terms *aggression* and *violence* sometimes used interchangeably. The definition of violence against a child, and basically child maltreatment, adopted by the WHO indicated that this involved “all forms of physical and/or emotional ill-treatment, sexual abuse, neglect or negligent treatment or commercial or other exploitation, resulting in actual or potential harm to the child’s health, survival, development or dignity in the context of a relationship of responsibility, trust or power”³. In this approach, attempts to isolate the act of violence in a system of reactions or to distinguish it from other forms of aggression, i.e. a wide range of human actions that are characterized by attacking or hostility⁴ – cruelty, neglect, destruction of objects, control, deterrence, ignoring, etc, are doomed to failure. This does not mean such attempts are not useful from the point of view of

² See *Encyklopedia pedagogiczna XXI wieku*, vol. 1, ed. T. Pilch, Warszawa 2003, p. 39-47; J. Danielewska, *Agresja u dzieci – szkoła porozumienia*, Warszawa 2002; B. Śliwerski, “Pseudowychowanie”, [in:] B. Śliwerski, *Pedagogika ogólna. Podstawowe prawidłowości*, Kraków 2012, p. 313-334; D. Zając, “Obszary przemocy w wychowaniu”, [in:] E. Kubiak-Szyborska, D. Zając, *Podstawowe problemy teorii wychowania. Konteksty społecznych przemian*, Bydgoszcz 2006, p. 243-259.

³ World Health Organization, *Preventing child maltreatment: A guide to taking action and generating evidence*, Geneva 2006, p. 9.

⁴ See A. S. Reber, *Dictionary of Psychology*, London 2001, p. 17; E. Fromm, *The Anatomy of Human Destructiveness*, New York, Chicago, San Francisco 1973, p. xv-xvi.

pedagogical theory. The premise developed in this study posits a qualitative difference between cruelty and narrowly defined violence, i.e. the exploitative use of physical or psychological force by the perpetrator or perpetrators to coerce the victim to change their actions or attitudes, to subjugate others to one's will, and to deprive the victim of life.

Cruelty, an incarnation of aggression and thus a phenomenon that, in light of deontology and its view of the well-being of people in an educational relationship, should be excluded from educational practice, seems easy to identify if it occurs together with violence or persecution and is therefore often identified or confused with them. It is far more difficult to see and identify it when it lacks such a clear context. It is not certain, therefore, if by removing violence and tyranny from the process of education, we will also get rid of cruelty. In other words, in seeking to counter cruelty, we run the risk that by turning to more transparent forms of aggression, such as maltreatment, oppression or manipulation we leave cruelty itself unrecognized (and possibly intact), or that we make suspect any form of coercion, including persuasion, since we see them as vehicles of aggression in the form of veiled cruelty. In this case, too, we will overlook this elusive phenomenon. What is more, trying to oppose and counteract it, we may be doomed to failure in advance, because, as Judith N. Shklar admits in the introduction to her book *Ordinary Vices*, inspired by Michel de Montaigne's ideas, "we can live neither with it nor without it. Moreover," she adds, "it puts us face to face with our irrationality as nothing else does"⁵.

Shklar's claim is very unsettling. Considering its consequences on the grounds of pedagogical deontology, we can conclude that education faces an unsolvable problem that undermines the humanistic foundations of contemporary education⁶. Therefore, mindful of the moral aspect of upbringing, we should review the phenomenon of human cruelty.

⁵ J. N. Shklar, *Ordinary Vices*, Cambridge, London 1984, p. 3. Shklar's book dealing with the moral and political significance of cruelty, hypocrisy, snobbery, treachery, and misanthropy, takes as its starting point the enumeration of the author of the *Essays*, published almost exactly four hundred years earlier, and his sketches devoted to these moral phenomena.

⁶ See B. Śliwerski, "Wychowanie jako działanie", [in:] B. Śliwerski, *Pedagogika ogólna*, op. cit., p. 144-188; S. Kunowski, "Znaczenie współczesne wychowania", [in:] S. Kunowski, *Podstawy współczesnej pedagogiki*, Warszawa 1993, p. 19-25.

PHYSICAL AND MORAL CRUELTY ACCORDING TO SHKLAR

In her reflections on cruelty, Judith N. Shklar draws on Michel de Montaigne's observations. According to the philosopher, the Renaissance humanist was the first thinker of significance for the intellectual traditions of the West to recognize cruelty as a fundamental moral threat. As he confessed in the *Essays*, "Among the vices, both by nature and judgement I have a cruel hatred of cruelty, as the ultimate vice of them all"⁷. Before de Montaigne, the question of cruelty, Shklar notes, both as a core ethical issue and a major moral problem, had not garnered the attention of philosophers or theologians, or this is at least what the scholar was able to ascertain on the basis of familiar and available source texts. Montaigne's significance for the question at hand goes beyond singling out this kind of moral threat from among other 'ordinary vices', such as treachery, infidelity or tyranny. As Shklar explains, the 16th-century thinker used the above, somewhat surprising term, since these are "the sort of conduct we all expect, nothing spectacular or unusual"⁸. (This is another source of possible anxiety for both the educator and the educational researcher, as are the philosopher's conclusions in the end of the book's introduction about ordinary vices: "Cruelty, hypocrisy, snobbery, and treachery will certainly never go away"⁹). De Montaigne's *Essays*, which, in the 17th century, one hundred years after its publication, was entered on the index of banned books, while not a systematic lecture on the subject of interest to us, abounds in fragments of substantively momentous inquiry, penetrating remarks, valuable digressions, and, above all, instructive illustrations, which can form the basis, as Shklar convinces us, for the effort to understand the problems brought about by the phenomenon of human cruelty.

Before turning to the musings of the Renaissance thinker, however, let us examine the reading of Montaigne's essays and the reflections on

⁷ M. de Montaigne, "On Cruelty", [in:] M. de Montaigne, *The Complete Essays*, London 1991, p. 480–481.

⁸ J. N. Shklar, *Ordinary Vices*, op. cit., p. 1. Shklar's motto preceding the introduction is a passage from Montaigne's essay "On the Cannibals": "treachery, disloyalty, tyranny and cruelty, which are everyday vices in us" (M. de Montaigne, *The Complete Essays*, op. cit., p. 236).

⁹ J. N. Shklar, *Ordinary Vices*, op. cit., p. 6.

cruelty offered in *Ordinary Vices* by a contemporary political theorist. Shklar links the top position of cruelty in the hierarchy of moral offenses in the ethical structure of liberal theory to the terror of modern religious wars. As she points out with regard to the political consequences of the use of terror, the resulting “fear destroys freedom” and reduces people “to mere reactive units of sensation and that this does impose a public ethos on us”¹⁰. Fear is not only the enemy of human freedom in that it effectively deprives individuals of initiative and inhibits their involvement. Its domination combined with its prolonged influence adversely transforms social relations, perpetuating norms and patterns of behaviour based on tyranny and subjugation. Moreover, according to Shklar, fear makes the oppressors cruel and fear increases the suffering of the victims¹¹. According to the philosopher, it constitutes the motivation of the perpetrator of physical cruelty, which is “the willful inflicting of physical pain on a weaker being in order to cause anguish and fear”. As she adds, it is “is a wrong done entirely to *another creature*”¹², which seems to refer likewise to the other kind of cruelty addressed by the scholar, i.e. moral cruelty.

Four questions deserve special attention in Shklar’s definition and discussion of physical cruelty in *Ordinary Vices*. Firstly, the physical cruelty she distinguishes is based on a relationship of inequality. The victim is a weaker being: physically, socially or as a species. Even in the case of resentment discussed by Nietzsche and revisited by Scheler, or rather its grounds, a deferred revenge of the weaker party must exploit momentary advantages against the dominant party¹³. Secondly, unlike ethics, in which a moral norm has been established on the basis of authority (Shklar refers to the Christian’s sin of pride against God) and its

¹⁰ Ibidem, p. 2, 5. See also: ibidem, p. 23, 236-238. See H. Arendt, “Mankind a Terror”, [in:] H. Arendt, *Essays in Understanding 1930-1954. Formation, Exile, and Totalitarianism*, ed. J. Kohn, New York 2005, p. 297-306. Instructive in this context is Franz Kafka’s story “In the Penal Colony”.

¹¹ See J. N. Shklar, *Ordinary Vices*, op. cit., p. 23.

¹² Ibidem, p. 8.

¹³ See M. Scheler, *Ressentiment*, Milwaukee 2007. On the connection between social distance and cruelty see J. N. Shklar, *Ordinary Vices*, op. cit., p. 27-29. The classic novel by Honorius Balzac, *Cousin Betty*, can serve as an illustration of the phenomenon of resentment and is a penetrating study of cruelty. Similarly, François Mauriac’s *The Knot of Vipers*.

violation is associated with its rejection, insult or disobedience, physical cruelty as an evil done to ‘another creature’ can be judged without reference to a higher authority, for it is “part of our normal private life and our daily public practices”¹⁴. In other words, physical cruelty and its judgment, according to the philosopher, relate directly to the persons involved. They do not require, as many religious and ethical doctrines do, recourse to external factors and criteria whose recognized customary priority might justify the perpetrator’s harmful action and disavow the victim’s suffering. Thirdly, physical cruelty is an intentional act with an unambiguously attributed goal of inducing fear and terror, and thus, fourthly, physical suffering here is only a means, and the effect expected by the perpetrator can be achieved in other ways (what Shklar refers to as moral cruelty in the later parts of her essay). If we add that the instilment of fear and terror results in the subjugation of the victims to the perpetrators, we should recognise that the description offered by Shklar basically coincides with what scholars have often tended to see as violence, without identifying it with cruelty¹⁵. It is also necessary to ask how the philosopher’s account of physical cruelty relates to the other kind of cruelty she discusses in *Ordinary Vices*. In other words, we should ask about the relation between violence and cruelty, which (even though Shklar assumes a relation here) is problematic for another reason than the one mentioned above.

According to the liberal theorist’s definition, the infliction of physical suffering for no other purpose than to induce fear and terror, i.e. to punish or to save life, should not be identified as cruelty. However, such a distinction seems difficult to sustain. As an example, consider excerpts from 18th- and 19th-century parenting manuals, cited by Alice Miller after the anthology *Schwarze Pädagogik* by Katharina Rutschky¹⁶. Here the authors approve of corporal punishment for the purpose of teaching children obedience, improving their behaviour or helping them

¹⁴ J. N. Shklar, *Ordinary Vices*, op. cit., p. 9.

¹⁵ See D. Zajac, *Obszary przemocy w wychowaniu*, op. cit., p. 243-246. See także: *Przemoc i agresja jako zjawiska społeczne*, ed. M. Binczycka-Anholcer, Warszawa 2003; *Różne spojrzenia na przemoc*, ed. R. Szczepanik, J. Wawrzyniak, Łódź 2008; *Agresja i przemoc: współczesne konteksty i wyzwania*, ed. K. Barłóg, E. Thuczek-Tadla, Jarosław 2013.

¹⁶ See A. Miller, *For Your Own Good. Hidden Cruelty in Child-rearing and the Roots of Violence*, New York 1990, p. 3-91.

adapt to social norms. The Swiss psychoanalyst, however, using Freudian theory of transference, argues that the overt aim in such cases is secondary to the aggressor's covert and unconscious intention to humiliate the weaker one, which often stems from the perpetrator's earlier experience of being a victim of aggression at the hands of someone stronger, and is in fact a reconfigured repetition of past humiliation, just as acts of self-mutilation or other forms of self-destruction would be. The therapist's perspective on the analysis of violence will further complicate Shklar's definition of physical cruelty if we consider that the question that makes it even more troublesome to point out the proper teleology of cruelty needs to be resolved, namely: aren't psychological compensation and repetition themselves at least equally important goals, the realization of which is promised to the perpetrator by the situation he creates? On the other hand, Miller herself, commenting on the examples selected from Rutschky's anthology, does not hesitate to use the term "cruelty", but not in the sense that Shklar is trying to grasp, but rather as an expression of disapproval of all forms of violence and, more broadly, aggression of adults towards children.

The political theorist would probably disagree with the consequences of the view that every act of violence is in principle physical cruelty, since it is in fact aimed, regardless of the declared intentions, at arousing fear in the victim weaker than the perpetrator by means of physical suffering. As he notes, "Punishment is justifiably inflicted in the service of retribution, education, or public security; but if it goes away from, or beyond, these ends we call it 'cruel and unusual' and forbid its use"¹⁷.

The term "go away from, or beyond, these ends" shows a certain excess yet is not imprecise. However, according to Shklar, it means that something more is needed in order to be able to say not only that a given punishment constitutes violence, but that it is cruelty.

The philosopher's view on the function of punishment seems to correspond to the pessimistic view of human nature and the organization of common life of people, which we can find in Freud, for whom culture in its broadest sense is the result of sublimation forced by social norms on members of a community. In other words, the individual is

¹⁷ J. N. Shklar, *Ordinary Vices*, op. cit., p. 24. See also: H. Arendt, *On Violence*, San Diego, New York 1970.

determined by the dynamics of the action of drives proper to his organism. These drives, along with desires, are responsible for the mental tension and pressure arising in the clash with the moral expectations and limitations imposed on him by the community. Violence, the use of force, although morally reprehensible and psychologically crippling, turns out to be politically necessary to sustain social order, among other things as a means of instilling and maintaining among its members the fear of possible sanctions for this order's transgression. Since this order is, usually correctly, internalized by the individual in the process of upbringing, including the sense of fear of its violation, he is capable not only of sublimating and approving behaviour, but also of self-censorship and of inflicting an appropriate punishment on himself. (Similar conclusions about the violent nature of culture, although from a different research perspective, are made by reproduction theorists¹⁸. Consequently, this means that in the face of state regulation, social norms, environmental impact, upbringing, or the nature and course of interaction, the individual is subject to permanent violence. Importantly, reproduction theorists seem to share with negative educators the view of the permeation of educational relations with violence. In one of the key books of this scholarly perspective we read that all pedagogical action "is, objectively, symbolic violence insofar as it is the imposition of a cultural arbitrary by an arbitrary power"¹⁹).

If Miller's views on the constitution of the individual and the aim of therapy deviate in many respects from the original assumptions of the founder of psychoanalysis, both authors seem to share a weakness, also characteristic of pedagogy, towards social engineering, for which education is synonymous with the grooming of individuals and the formation of society. In other words, it is not at all clear that Miller, who advocates Ekkefard von Braunmühl's anti-pedagogical theories, while criticizing black pedagogy and the grooming of individuals, also rejects the temptation to mould society via education.

In contrast, classical liberalism, within which Shklar operates, assumes that social life is determined by politics, while politics is determined

¹⁸ See P. Bourdieu, J.-C. Passeron, *Reproduction in Education, Society and Culture*, London, New Dehli 1990; R. Moore, *Education and Society. Issues and Explanations in the Sociology of Education*, Oxford 2004 (chapters 2 and 3).

¹⁹ P. Bourdieu, J.-C. Passeron, *Reproduction in Education, Society and Culture*, op. cit., p. 5.

by autonomous citizens. Liberal theory²⁰ sees the individual as free and equal to others, focuses attention on adults and independent individuals, assumes a diversity of attitudes, value scales, worldviews, competencies, knowledge, interests, and positions and statuses coexisting in society, and assumes that counteracting the conflicts resulting from pluralism allows for a limited right to use force and coercion, redistributed among individual institutions. Such is the importance of the philosopher's nuanced understanding of violence that the moral and political impact she is interested in among adult free citizens will have a different character and consequences for her than Miller's participation of violence in child development. In this sense, physical cruelty is, according to the political theorist, unlawful and unjustifiable violence.

It can also be said that both scholars do not so much want to talk about cruelty itself as about violence and other forms of aggression. Miller refers to their effects in upbringing and Shklar's in interpersonal relations and politics. While for Miller any use of physical or psychological force is abuse, Shklar would only consider unjustified violence as cruelty. Both, however, show a clear tendency to reduce cruelty to violence, whereas these two are separate phenomena that often co-occur. In other words, Shklar's account of cruelty seems to elude comprehension, perhaps because of the liberal theoretical stance she has taken and the focus of the political science discipline she represents, which suggests that in order to verify her conclusions she should go directly to the source of her reflection, i.e. de Montaigne's essays.

Before that happens, however, let us say a few more words about the second kind of cruelty that the philosopher distinguishes:

It is deliberate and persistent humiliation, so that the victim can eventually trust neither himself nor anyone else. Sooner or later it may involve physical hurt, but that is not inherent in it. Painful as humiliation is, it does no bodily damage²¹.

²⁰ See J. Gray, *Liberalism*, Minneapolis 1986; W. Kimlicka, *Contemporary Political Philosophy. An Introduction*, Oxford 2001, p. 53-101.

²¹ J. N. Shklar, *Ordinary Vices*, op. cit., p. 37. In the characterization given by Shklar, the term "persistent" may suggest sadism, but the philosopher herself distinguishes between the two (see *ibidem*, p. 43-44).

First of all, the idea expressed in the quote seems to bear out the earlier conclusions that cruelty cannot be reduced to violence, and therefore there is only one kind of cruelty, moral one, while violence and physical suffering, being one of many means of possible control over the victim, remain a separate phenomenon that may accompany cruelty. Also Shklar seems to provide an argument in favour of this claim when she writes that: “Montaigne was well aware of moral cruelty, and saw it as a personal danger, but he never confused it with physical brutality”²².

The excerpt from Shklar’s discussion of moral cruelty brings another important element to her understanding of it. The philosopher speaks of the victim’s disorientation, which we can combine with the experience of loneliness²³, since, humiliated, victims cannot explain to themselves or to others the reason for their suffering. The question raised by Shklar allows us to ask: to what extent is the act of cruelty disguised? To what extent, therefore, can it be grasped and explained? Shklar, too, notes that there is a reason why Montaigne does not explicitly say what cruelty is but instead uses stories. As she explains, “It may well be that the vices, and especially cruelty, escape rationalizing so completely that only stories can catch their meaning. Of this I am not entirely sure, again in keeping with Montaigne’s caution and skepticism”²⁴. Although Shklar’s proposed distinction between physical and moral cruelty seems misleading, one should prudently take attempts to define the phenomenon.

MONTAIGNE ON CRUELTY AND CUSTOM

In Chapter xxxi of Book One of the *Essays*, “On the Cannibals”, Michel de Montaigne describes customs of dealing with captives of an unspecified tribe of ‘savages’, which he learns from an account related to him:

²² Ibidem, p. 37. Erich Fromm does the same in his remarkable study *The Anatomy of Human Destructiveness*, addressing aggression, distinguishing between cruelty and destructiveness. Nevertheless, he points out that the two phenomena occur together (see op. cit., p. 1-10).

²³ See J. N. Shklar, *Ordinary Vices*, op. cit., p. 10-11, 23.

²⁴ Ibidem, p. 6.

For a long period they treat captives well and provide them with all the comforts which they can devise; afterwards the master of each captive summons a great assembly of his acquaintances; he ties a rope to one of the arms of his prisoner and holds him by it, standing a few feet away for fear of being caught in the blows, and allows his dearest friend to hold the prisoner the same way by the other arm: then, before the whole assembly, they both hack at him with their swords and kill him. This done, they roast him and make a common meal of him, sending chunks of his flesh to absent friends. This is not as some think done for food – as the Scythians used to do in antiquity – but to symbolize ultimate revenge. As a proof of this, when they noted that the Portuguese who were allied to their enemies practised a different kind of execution on them when taken prisoner – which was to bury them up to the waist, to shoot showers of arrows at their exposed parts and then to hang them – they thought that these men from the Other World, who had scattered a knowledge of many a vice throughout their neighbourhood and who were greater masters than they were of every kind of revenge, which must be more severe than their own; so they began to abandon their ancient method and adopted that one. It does not sadden me that we should note the horrible barbarity in a practice such as theirs: what does sadden me is that, while judging correctly of their wrong-doings we should be so blind to our own²⁵.

Let us leave aside the question of how far Montaigne's description reflects the patterns of behaviour we might have experienced in the world at the time. Resolving that question is not necessary here. Assuming that the essay expresses the author's views, we can take the story of the customs of both the cannibals and the Portuguese as an illustration of Montaigne's notion of cruelty. Although the term itself does not appear in the above passage, having referred to what Shklar writes about cruelty, based on the *Essays*, we can assume that the above description confirms and actually enhances our knowledge of the Renaissance humanist's views on the subject of interests to us.

The comparison made by Montaigne between the customs of the members of two different cultural groups allows us to again pose the

²⁵ M. de Montaigne, *The Complete Essays*, op. cit., p. 235. See also: *ibidem*, p. 125-126, 131, 236-237, 481-486.

question about the relationship between violence and cruelty. Here, in an act of revenge, cannibals prepare a meal from the body of a prisoner of war. They kill the enemy, but the very manner in which they do so seems to introduce into the whole situation an additional element, independent of the act of violence. The cannibals, as Montaigne depicts them, are not indifferent to the kind of death inflicted. What leads to it seems to arouse fear in the captive and to deepen, in their view, his suffering. Equally importantly, revenge does not end with his death. What happens around the act of violence itself, both before and after the captive's death, and what is only incidentally related to it, becomes significant. According to Montaigne's narrative, the cannibals decide to change the ritual and imitate the Portuguese in order to mete out revenge by other means and more completely. Death is not enough. It is the 'something more', the excess of which Montaigne writes in another essay: "As for me, even in the case of Justice itself, anything beyond the straightforward death- penalty seems pure cruelty [...]"²⁶.

Had it not been for the decision to change the ritual, this element and the attendant passion would have remained masked under the guise of a custom adopted from previous generations and repeated by the members of the tribe not so much, as we suspect, out of a personal desire for cruelty, but out of respect for tradition. This excess, which aggravates suffering and which Montaigne unmasks in his narrative, seems to elude discussion by virtue of the fact that the act of violence, i.e. the murder and death of a captive, is at the centre of the event, and the very manner of taking his life is beyond choice and is justified by the established custom. Thus, at most, we can say about it, and not about the people who cultivate it, that it permits cruelty, which at the same time exonerates the members of the tribe who follow a pattern. It is not difficult to explain why murdering a captive is violence, while proving that preparing and eating the victim's body should be considered cruel is not so obvious. When asked why we would want a different kind of death for a captive, we could only answer that we think this one is cruel. Yet when asked why we think another type is less cruel, we would probably be at a loss for words. Certainly, cruelty is easier to sense than to discuss or prove. That seems to be the reason for its appeal as a tool of aggression.

²⁶ Ibidem, p. 482.

In Montaigne's description of the custom of the cannibal tribe we are able to see this excess, perhaps not only thanks to the author of the *Essays*, but also because the followers of this barbaric ritual are not ashamed of their cruelty and try to highlight it themselves. The situation is different in another case described by the Renaissance humanist:

St Hilary, the Bishop of Poitiers and a famous enemy of the Arian heresy, was in Syria when he was told that his only daughter Abra, whom he had left overseas with her mother, was being courted by some of the most notable lords of the land since she was very well brought up, a maiden fair, rich and blooming. He wrote to her (as we know) that she should get rid of her love of the pleasures and favours that were being offered her, saying that he had found for her during his journey a Suitor who was far greater and more worthy, a Bridegroom of very different power and glory, who would vouchsafe her a present of robes and jewels of countless price. His aim was to make her lose the habit and taste of worldly pleasures and to wed her to God; but since the most sure and shortest way seemed to him that his daughter should die, he never ceased to beseech God in his prayers, vows and supplications that he should take her from this world and call her to Himself. And so it happened; soon after his return she did die, at which he showed uncommon joy. [...] when St Hilary's wife heard from him how the death of their daughter had been brought about by his wish and design, and how much happier she was to have quitted this world than to have remained in it, she too took so lively a grasp on that eternal life in Heaven that she besought her husband, with the utmost urgency, to do the same for her. Soon after, when God took her to Himself in answer to both their prayers, the death was welcomed with open arms and with an uncommon joy which both of them shared²⁷.

It seems highly doubtful that a father who prays for his daughter's death and then considers his intercession to God to be a glorious accomplishment actually contributed to her parting from life. Yet the story told by Montaigne is disturbing. We are surprised by the reaction of St. Hilary's wife, in whom not only the death of her daughter but also the bishop's attitude should trigger suffering, frustration and anger. Actually, however, the pain of the loss draws her closer to her husband

²⁷ Ibidem, p. 246.

and his stratagem. The tenor of Montaigne's story seems ironic, but the realization that faith in God, religious devotion and the typical medieval attitude toward earthly life can explain the authentic zeal of the parents helps us understand the solace obtained by St. Hilary's wife. Could Abra's mother resent her husband's desire for the supreme good of faith for their daughter, i.e. 'eternal life in Heaven'? Her petition to St. Hilary seems to prove that she believed that her husband had indeed obtained God's intercession and could obtain it again for her. Because of her views at the time, she is unable to expose her husband's cruelty. This does not mean she does not feel it, for there is a high probability that by attempting to accuse him of it, she would expose herself to ridicule and misunderstanding on the part of the community. She may not even understand it herself. Hence, humiliated, feeling alone, unable to oppose the veiled cruelty (veiled probably also for the bishop), possibly even unable to understand her own contradictory feelings, her pain and despair pitted against the 'eternal life in Heaven' of her daughter, she decides to surrender to his action herself.

What, then, is cruelty? It is disguised aggression which makes the victim feel lonesome, left alone with her fear and suffering, which to a large degree intensifies it, because she becomes confused about the causes of the pain she feels. As a result of this dissonance, she is unable to convince herself and others that she has been wronged and that she deserves understanding and compassion, in other words recognition of the harm she has suffered. It seems that it is this lack of recognition of the victim's suffering that is crucial here. Since cruelty is veiled and evades verbalisation, recognition is difficult to come by, which at the same time helps the perpetrators to remain above suspicion and often to be seen as the victim's benefactors. Similarly, when cruelty is based on or related to an act of violence, the recognition of the victim's suffering is limited to the effects of the violence, which masks it, diverts attention from the act of cruelty which remains in its shadow and is often more severe, and blames the perpetrator only for the act which is easier to prove. Unmasking the atrocity is difficult and in principle only a confession or ostentatious display by the perpetrator can help.

Naturally not all the aforementioned conditions need to be met in a particular case. As we read in de Montaigne's example, the cannibals exposed their own cruelty, which helped to unmask it. Nevertheless, we

realize that a substantive discussion about which kind of death or violence is more or less cruel boils down to tautological statements (we accept something as less cruel because we accept it as such) or a sense of powerlessness. We may tacitly empathise with the person who has been wronged, showing solidarity with them because of the suffering they are experiencing. Yet when dealing with cruelty, we are faced with the problems of grasping, understanding or communicating to others the victim's rationale, which could open the way for them to fully acknowledge the pain they are experiencing and free them from the sense of loneliness that greatly exacerbates the humiliation.

When a parent hears: "Mom, I don't think I love you", is the five-year-old spontaneous or cruel? Can one ascertain this without risking showing bad faith? Can a friend who because of her friend's engagement will lose an important part of herself in a way confide her feelings of loneliness in the happy engaged friend? What does a pupil feel when, complaining to his guardians about constant violence from one of his schoolmates, he is reproached for not knowing how to defend himself? Or the one who has become the object of embarrassing anecdotes offered during social visits to friends by parents, who in this way show their attachment to the child? There are children who are always the last to be chosen for play.

In a popular American action movie production, both the positive and negative protagonists are violent, which does not prevent the audience from perceiving one of them more favourably. What makes them different, then? The scale of destruction, motivations or the fact that one of them is shown as cruel? Similarly large audiences are attracted to entertainment programs in which newcomers to the scene voluntarily accept unfettered and patronising criticism by a group of celebrities.

According to Montaigne, followed by Shklar, cruelty belongs to the 'ordinary vices' that constitute our everyday life. It is a series of small stabs and pricks, often escaping our attention, alongside the big picture, making up a "tangle of lies, betrayal, anger, and cruelty", whose examples are offered by Ivan Karamazov in a conversation with his brother Alyosha. Dostoyevsky's protagonist exemplifies the philosopher's claim that putting cruelty first makes us prone to misanthropy, which can be accompanied by a tendency to glorify the victims²⁸.

²⁸ See J. N. Shklar, *Ordinary Vices*, op. cit., p. 12-15.

CRUELTY AND UPBRINGING ACCORDING TO MONTAIGNE

The story of the cannibal ritual reveals an interesting conviction, perhaps shared by the author of the *Essays* himself: our sensitivity to cruelty is a permanent disposition that transcends cultural boundaries. Noticing and appreciating the barbarity of the Portuguese, the members of an exotic tribe decide to change their characteristic custom. While their gesture may be considered a sign of the gradation of physical pain common to all human beings, Montaigne points to the reaction of the Europeans, who feel 'the horrible barbarity' of cultivating cannibalism. Although sensitivity to others' cruelty does not go hand in hand here with the ability to distance oneself from native cultural practices, to recognize one's own "wrong-doings," it does not mean its complete disappearance either. Montaigne confesses that he has not become desensitised by the number of encounters or the passage of years:

I live in a season when unbelievable examples of this vice of cruelty flourish because of the licence of our civil wars; you can find nothing in ancient history more extreme than what we witness every day. But that has by no means broken me in²⁹.

While the question of universal human sensitivity to cruelty was unresolved by the author of the *Essays*, the idea itself seems noteworthy.

In one other respect, Montaigne seems to ponder the question of the universal nature of cruelty, as the propensity to cruelty is according to him a component of human nature, albeit he is not consistent on this point. In the essay "On Cruelty" he observes:

I fear that Nature herself has attached to Man something which goads him on towards inhumanity. Watching animals playing together and cuddling each other is nobody's sport: everyone's sport is to watch them tearing each other apart and wrenching off their limbs³⁰.

²⁹ M. de Montaigne, *The Complete Essays*, op. cit., p. 484. See P. Sloterdijk, A. Finkelkraut, "Le stade et l'arène", [in:] P. Sloterdijk, A. Finkelkraut, *Les battements du monde*, Paris 2003, p. 55-72.

³⁰ M. de Montaigne, *The Complete Essays*, op. cit., p. 485.

(Although it is hard to agree that “Watching animals playing together and cuddling each other is nobody’s sport”, we do realise that scenes of violence and cruelty gather a disproportionately bigger audience).

He says something similar in chapter one of Book Three of the *Essays*: “Our being is cemented together by qualities which are diseased. [...] for in the midst of compassion we feel deep down some bitter-sweet pricking of malicious pleasure at seeing others suffer. Even children feel it [...]”³¹. The way this ‘instinct of inhumanity’ is going to develop or get stifled depends on the impact of the environment’s upbringing. Montaigne recognises the ambivalence of parents’ and educators’ efforts with respect to what would seem children’s natural inclinations (in line with the aforementioned quotations). He notices that humanistic tendencies are accompanied by unperturbed cherishing of human vices, cruelty included:

I find that our greatest vices do acquire their bent during our most tender infancy [...] Mothers think their boys are playing when they see them wring the neck of a chicken or find sport in wounding a dog or a cat. Some fathers are so stupid as to think that it augurs well for a martial spirit if they see their son outrageously striking a peasant or a lackey who cannot defend himself, or for cleverness when they see him cheat a playmate by some cunning deceit or a trick. Yet those are the true seeds by which cruelty, tyranny and treachery take root; they germinate there and then shoot up and flourish, thriving in the grip of habit. And it is a most dangerous start to education to make excuses for such low tendencies because of the weakness of childhood or the unimportance of the subject³².

Of course, according to Montaigne, one should counteract the perpetuation of harmful custom by implementing and habituating valuable behaviours. He recommends as follows:

We must carefully teach children to detest vices for what they consist in; we must teach them their natural ugliness, so that they flee them not only in their deeds but in their minds: the very thought of them should be hateful, whatever mask they hide behind³³.

³¹ Ibidem, p. 892.

³² Ibidem, p. 124. See also: ibidem, p. 185, 437, 809-810.

³³ Ibidem, p. 124.

Beneficial customs instilled in the process of upbringing are what can prevent people from resorting to cruelty. Montaigne is one of those thinkers who attach great importance to the cultural practices in which human action and thought are embedded³⁴. Hence, he sees habit as a chance for efficient social control. He notes:

The laws of conscience which we say are born of Nature are born of custom [...]. But the principal activity of custom is so to seize us and to grip us in her claws that it is hardly in our power to struggle free and to come back into ourselves, where we can reason and argue about her ordinances³⁵.

The passages quoted from Montaigne's essays highlight another aspect of the presence of upbringing and custom in our lives that should be considered relevant to the issue at hand. Perhaps because, as the Renaissance humanist claims, custom "hides the true aspect of things from us"³⁶, cruelty can be masked. In other words, in such a case, custom, like a law issued by a higher authority, not only distracts us from the role of the perpetrator of the humiliation, his initiative and the abuse he has committed, but also exonerates him of the responsibility for the consequences of his actions and justifies and legitimises their presence. Therefore, the remedy proposed by Montaigne to prevent the development of vile tendencies by means of an upbringing which moulds the deeds and the heart, which fixes people's virtuous habits and the corresponding laws of conscience in conformity with the prevailing custom of a particular community, in a certain way favours the moral danger it seeks to counteract. Habit in itself need not contain and preserve cruelty, but by enslaving us and obscuring the "true aspect of things", it fosters its hidden presence in our lives. In this sense, Shklar may be right when she claims that "Cruelty, hypocrisy, snobbery, and treachery will certainly never go away", and given the current state of cultural practices to which "we all expect", and which, contrary to Montaigne's hopes, continue to nurture

³⁴ A significant remark on the relationship between action and thought is made by Montaigne in his essay "On Habit: and On Never Easily Changing a Traditional Law": "And does not habit teach the roughest of the rough something which the whole of philosophy fails to implant in the heads of the wisest of men?" (ibidem, p. 129).

³⁵ Ibidem, p. 130.

³⁶ Ibidem, p. 131. See also: ibidem, p. 122-139; J. N. Shklar, *Ordinary Vices*, op. cit., p. 27-28.

our sordid tendencies, including cruelty, she may also be right in that “we can live neither with it nor without it”. These are, as has been said, important sources of anxiety for both educators and educational researchers.

There is, however, another lesson that Montaigne teaches us: “My horror of cruelty thrusts me deeper into clemency than any example of clemency ever could draw me”³⁷. Perhaps by practicing gentleness and critical thinking, to which not only the above passage, but in a sense all the *Essays* proves, we are able to avoid inflicting and experiencing, the pain of cruelty, to avoid fear, disorientation and loneliness. By exposing this excess and seeking recognition of the victims’ reasons, perhaps we can also reduce their suffering. Along these lines, it should be considered whether, in addition to the formation of valuable habits, the duty to educate for gentleness and critical thinking, intended to counteract the appearance of cruelty in education and everyday life, could not be an important contribution of pedagogical deontology to pedeutology and pedagogical and professional ethics.

Finally, one more example of double cruelty. Known as *Job Taunted by His Wife*, a painting by Georges de La Tour depicts a woman bent over a tormented figure of an old man. Sitting on a stone block, the almost naked Job tilts his head to see her candle-lit face in the darkness. The old man is listening. The wife’s statement in the biblical text does not lend itself to straightforward interpretation, but it can be assumed that, in contrast to her husband’s friends who are about to arrive, the woman does not blame him for the trials and tribulations that have befallen her, him, their relatives, and their home. According to Bildad, as well as the other companions of the anguished Job, his misery and suffering must be a deserved punishment for hidden or forgotten sins. Yet we know that this is not the case. God tries Job, but not for his faults. On the contrary, in the opening scenes of the book, we and we alone are witnesses to a discussion between the Creator and Satan, in which the former presents to his adversary the man from Us as impeccably righteous. Job’s friends interpret the situation differently. Their whole cruel tirade seems to be summed up in the statement of Eliphaz the Temanite: “Can mortals be acquitted by God?

³⁷ M. de Montaigne, *The Complete Essays*, op. cit., p. 1045.

Can man be cleared by his Maker?" (Job 4:17). They have no evil intentions; this is what their faith dictates. What can Job say to his unbelieving and uncomprehending friends when all explanations fail? Ironically: "Indeed, you are the [voice of] the people, And wisdom will die with you" (Job 12:2), seems to be both an expression of resignation and loneliness. Does Job believe himself, since he demands an explanation directly from the Creator?

De La Tour's canvas rivets our attention to another moment in the fate of the faithful servant. The female figure in the biblical story is at the centre of the Baroque artist's poetics. If we were not familiar with the text, we might assume that her face expresses gentleness and understanding. This is what Alice Miller calls a 'helping witness', someone who, because of her experiences and background, is able to recognise victims of cruelty and empathetically support them so that they do not feel alone in their suffering³⁸. But this is merely conjecture. All the more problematic because, as we read in the Talmudic treatise *Bava Batra*, "Job never existed and was never created; there was never such a person as Job. Rather, his story was a parable" (15a).

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³⁸ See A. Miller, *Breaking Down the Wall of Silence. The Liberating Experience of Facing Painful Truth*, New York 2009, p. xi-xii, 7-8, 56-57.

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PARENTAL IMAGE IN THE PERCEPTION OF CHILDREN FROM DIVORCED MARRIAGES IN QUALITATIVE RESEARCH

ABSTRACT:

The issue of the family and its dysfunctions has been at the centre of interest of various social sciences for many years, despite the fact that it is an extremely difficult subject to study. The phenomenon of divorce is rarely presented from the point of view of children. Hence, the aim of this research was to unveil this cognitive perspective and to determine the image of parents in the perception of children from divorced families. The key task concerned how a child in a divorced family perceives herself or himself and other family members. Fritz Schutze's method of narrative interview analysis was used in the study.

KEYWORDS:

children, divorce, family structure disruptions, single-parent family

In Poland and worldwide, divorce has become an established phenomenon of social reality, which results in the increasing number of children from single-parent families. For this reason it has become important to move away from the view that a divorced family is a dysfunctional family

and to consider it as a different kind of family system. In some cases, divorce is the only solution to maintain a homeostasis in the family so that it can continue to function under new rules. One speaks then of the transformation of the system, not of its disintegration.

Undoubtedly, divorce is the most disruptive for children. Both the process that precedes it, and the divorce itself, are highly stressful situations for them, which leave a mark on their psyche for the rest of their lives. Growing up in a single-parent family implies a number of negative consequences for the child's psychological development. The phenomenon of divorce is perceived from the perspective of adults, rarely is it explored from the point of view of children. Therefore, the aim of the study was to present this cognitive perspective and to determine the image of parents in the perception of children from divorced families.

FUNCTIONING OF CHILDREN FROM DIVORCED MARRIAGES

Parental divorce is one of the most stressful situations in a child's life. The functioning of children from divorced marriages depends primarily on the functioning of the parents. "The atmosphere in the divorcing family is described as abnormal, tense, full of nervousness and inducing anxiety. It results not only from domestic conflicts but also from the psychological condition of the parents"¹.

A theory developed by psychologists called "the syndrome of an individual's response to traumatic events", assumes that there are 3 phases occurring in succession²:

- Initial stage: an individual lives under the pressure of the constant presence of the stimulus. He/she constantly reproduces past events in all types of activity. Loss of previously formed habits may occur. Dependent behaviour and excitability increase. Awareness of the threat may lead to a development of a sense of responsibility for the loved ones.

¹ *Encyklopedia Pedagogiczna XXI wieku*, vol. V, ed. T. Pilch, Warszawa 2006, p. 478.

² E. Jackowska, "Modele odpowiedzi człowieka na wydarzenia traumatyczne", *Edukacja Humanistyczna* 2002, no. 1-2, p. 73-82.

- Middle stage: an individual has impaired interpersonal relationships, avoids challenges and new experiences.
- Long-term response: long-term patterns of behaviour are established, on the basis of which an individual builds defence mechanisms, strategies for coping with difficult situations. Personality development disorder occurs.

The severity of the stress that a child experiences in relation to family breakdown and its effects depend on the child's perception of the home situation prior to the divorce and the extent of the child's attachment to each parent and siblings, the child's age at the time of the divorce, the child's gender, and, most importantly, the child's psychological resilience. Of the situational factors, the most important include: the child's degree of preparation for what is to come, the course of the event, the frequency and type of contact with the parent who has left, and the extent of change in the child's life³.

It is believed that children who have felt happy in the family are most at risk from divorce stress. According to Ewa Wideł, there are a number of factors that can increase the child's vulnerability to divorce stress or serve as a source of crisis mitigation. These include: "the child's perception of the quality of the parents' marriage before the divorce, the quality of the parents' relationship after the divorce, the child's pre-divorce contact with the parent leaving the family, the repressiveness of norms regarding divorce, and the child's age and gender"⁴. Wideł writes that "the child's accurate interpretation of the quality of the parents' marriage before the divorce prepares the child for the divorce crisis from the beginning. Inadequate perceptions of this relationship deepen the child's psychological trauma associated with family breakdown"⁵. The leading concept in divorce stress theory, then, is the definition of the situation, or the degree of importance assigned to the crisis⁶.

Parental expectations of children implicate them in a myriad of roles designed to vent anger at the other parent. Following the Belgian

³ See *Encyklopedia Pedagogiczna XXI wieku*, vol. v, op. cit., p. 480.

⁴ E. Wideł, "Przystosowanie dziecka do rozvodu rodziców", [in:] *Rodzice i dzieci a psychologiczny obraz sytuacji problemowych*, ed. Milewska, A. Szymanowska, Warszawa 2000, p. 51.

⁵ Ibidem, p. 52.

⁶ See M. Beisert, *Rozwód. Proces radzenia sobie z kryzysem*, Poznań 2000.

researcher, there are typically three types of children's roles in a conflicted or divorced family⁷:

- The 'messenger' child serves a link between parents who cannot communicate except through an intermediary. The child expends too much energy adapting to the ever-changing conditions of life, making it impossible for him or her to fulfil other age-specific social roles. This type of behaviour is illustrated by the example: "When you go to Daddy's house tell him..."
- The 'scapegoat' child is often unconsciously blamed by the parents for the breakdown of the relationship and it is the child on whom all their anger is focused. In extreme cases, the child may be excluded from the family.
- The 'avenger' child is forced to take part in the war between their parents while being torn between them. He or she feels alienated in his or her needs, breaks off previously established relationships with peers.

A study conducted by Jadwiga Izdebska in 2003 found that 57% of children experience stress after their parents' divorce. They also feel anxiety and the need to turn back time. 47% experience loneliness, emptiness and grief, while 6% of respondents feel relief. Almost all children (97%) felt lonely in families broken by divorce, they said they were very sad, cried, expected visits from their father, and at the same time experienced feelings such as shame and jealousy⁸. According to Henryk Cudak's study, despair, fear, and anxiety were the most common emotions manifested by the youngest children aged 7 to 9 years. Feelings of sadness, lack of security and sense of life were most often indicated by 10-12 year old children, and in the highest percentage they expressed anger, malice, aggression towards the separation of their parents⁹.

Cudak classified four main types of feelings that occur in children upon hearing about their parents' divorce as negative reactions: indifference, or apathy, external aggression or even self-aggression, a sense of helplessness, and instability of emotional moods. The child ceases to be interested in anything, feels emptiness and boredom, idly spending

⁷ P. Vangyseghe, J. Appelboom, "Repercussions psychologiques du divorce parental chez l'enfant", *Rev Med. Brux* 2004, vol. 25, p. 421-482.

⁸ See J. Izdebska, *Dziecko osamotnione w rodzinie*, Białystok 2004.

⁹ See H. Cudak, *Funkcjonowanie dzieci z małżeństw rozwiedzionych*, Toruń 2003.

leisure time. Having learned about the divorce, the children limit their own activity and give up on many of their earlier occupations. They demonstrate a fear of the future, predicting many disasters and failures in their further lives. They experience lowered self-esteem and self-confidence, as well as a large amplitude of emotional moods, from euphoria to sadness. They develop a sense of emptiness and meaninglessness of life, which only intensifies their emotional dysregulation. External aggression manifests itself in them through violent and aggressive reactions to people closest to them or to people functioning outside the family. Cudak's research allows us to state that parents inform their children about alleged or actual betrayals, dishonesty, go as far as bribery and undermining the authority of the other party, sometimes they even try to break the bonds between them and the child. The child becomes stubborn, lies, and shows aggression towards the environment, including parents¹⁰. It can also be expressed in the form of silent aggression, that is, resistance, rebellion, malice. If the aggression in a child can't be solved by different forms of negative activity or destructive behaviour, it can transform into self-aggression, which is expressed in destroying one's own person, self-mutilation, suicide attempts, as well as alcoholism and drug addiction¹¹.

The impact of divorce on children varies at different stages of development. At the same time, depending on the age, a child attributes different degrees of importance to the crisis in the family.

Judith Wallerstein places divorce in the developmental cycle of the family and treats it as one of the ways of solving the family crisis. The process of coping with divorce by children and adolescents is described by the author as a series of tasks in a hierarchical time order¹². The process of reorganizing one's life consists of 6 stages: awareness of marital breakdown, detachment from conflict, coping with losses, anger management, accepting the permanence of the breakdown, new relationships.

1. Awareness of the breakdown of the parents' marriage: the child must acknowledge this fact and try to understand the cause. He or

¹⁰ See H. Cudak, "Sytuacja emocjonalna dziecka w trakcie procesu rozwodowego rodziców", [in:] *Rodzina polska u progu XXI wieku*, ed. H. Cudak, Łowicz 1997.

¹¹ See H. Cudak, *Funkcjonowanie dzieci z małżeństw rozwiedzionych*, op. cit.

¹² See M. Farnicka, "Jak sobie radzić z rozwodem rodziców. Według koncepcji Wallerstein", *Problemy Rodziny* 1991, no. 1, p. 67-71.

she has trouble understanding his or her parents' behaviour, and a lack of information about what is happening can foster blame or fantasies about a happy family.

2. Separation from the parents' conflict and resumption of normal pursuits: a child should gain a psychological distance from the parents' problems, which is facilitated by all group extracurricular activities and support in the peer group. An important role is also played by the school counsellors, who should help the child to release negative emotions connected with parents' separation.
3. Coping with the losses resulting from the parents' divorce: a child experiences intensely the loss of material security, support from both parents, as well as status and prestige. Due to the change of residence, he/she loses friends and school. According to Judith Wallerstein, one way to help compensate for these losses is to maintain a relationship with both parents.
4. Dealing with anger and self-blame: a big danger at this stage is that a child distances himself/herself from the parent with whom he/she feels particular anger. The solution is letting go of the guilt and forgiving the parent.
5. Acceptance of the permanence and irreversibility of divorce: a child should by this point have regained his or her emotional stability and overcome the stress of leaving a parent. However, he or she does not stop dreaming about his or her parents reconciling.
6. Achieving realistic hopes for interpersonal relationships: the final stage involves a readiness to enter into relationships with others. A child defines his or her relationships with parents and, in time, with their new families, and gains confidence and trust in his or her own competence in maintaining relationships with other people¹³.

According to Judith Wallerstein, when determining the order in which the stages occur, it is not possible to talk about the length of the stages. It will depend primarily on the quality of the emotional bond with the parents, the age of the child, external help and many other factors that determine the child's psychological development¹⁴.

¹³ See M. Farnicka, "Sposoby radzenia sobie z rozwozem przez dzieci", *Problemy Opiekuńczo-Wychowawcze* 2000, no. 1, p. 6-8.

¹⁴ See J. Wallerstein, "Children of Divorce: The Psychological Tasks of the Child", *American Journal of Orthopsychiatry* 1983, no. 53, p. 230-243.

METHODOLOGY

The phenomenon of divorce is usually examined from the perspective of the causes, effects, or people to whom it happens. It is rarely explored from the children's point of view. Hence, the purpose of this research was to reveal this cognitive perspective and determine the image of parents as perceived by children from divorced families. The key task concerned such issues as: the way in which a child in a divorced family perceives him or herself and other family members, the place of significant people, significant life moments, and key decisions in sustaining the argument.

Operationalisation of the research objectives made it possible to formulate the following research questions: What is the image of parents in the perception of children from divorced families? How does the child perceive the relationship between the parents? How has divorce affected the perception of the mother and what feelings dominate the relationship with her? How has divorce affected the perception of the father and what feelings dominate the relationship with him?

Qualitative research methods were used in this study. The methodological framework of the research is set by the rules of grounded theory. The study also made use of Fritz Schutz's method of narrative interview analysis, which is based on elements such as theoretical comments, argumentative comments and background constructions. These have been collectively referred to as glosses. They are divided into three groups: relations with the mother, relations with the father, and relations between parents. The quotations attached to the glosses helped to show the image of the family and the way of thinking about parents¹⁵.

Given the purpose and method of the study, it became important to select a sample that met the following requirements: coming from divorced families with parents living separately, being at least 18 years old, and giving consent to record the interview. As a result, consent was obtained from 3 people meeting these criteria. All respondents are students at the University of Warmia and Mazury and voluntarily agreed to participate in the study. The average interview time was one hour.

¹⁵ See K. Konecki, *Studia z metodologii badań jakościowych. Teoria ugruntowana*, Warszawa 2000.

According to the procedure, the interview was recorded on a voice recorder. The audio recordings were used to understand how the participants organize their speech¹⁶. Subsequently, they were transcribed. During the transcription, the length of pauses occurring during the narrative (silence, sudden breaks), various paraverbal signals (e.g., laughter, sighs), emphasized spoken words, etc. were marked in the text using various symbols¹⁷. The use of the narrative method made it possible to collect rich biographical material, which was subjected to qualitative analysis.

ADULT CHILDREN OF DIVORCED PARENTS – A SKETCH FOR A PORTRAIT

The participants of the study are female students between the ages of 21 and 26 and come from the Warmińsko-Mazurskie Region. They have not yet started their own families and live with their mothers. In the future, as they say, they intend to get married and have children, and a professional career is not a priority for them. They are studying pedagogy and administration. The girls come from families whose parents have university degrees. Each of them has experienced the family structure disruption, although it occurred at different stages of their lives. The family breakdown left a permanent mark on their psyche and influenced their future life choices and the way they perceived their parents. The youngest, Ania, was only four years old at the time of the divorce and, as she says, no longer remembers that moment. Dominika was eighteen when her father left her for another woman and, according to the girl, waited until her daughters came of age. Karolina, on the other hand, was twenty-one years old, and she says that she fully understood what was going on in her parents' marriage.

Karolina's parents divorced 3 years ago, in 2005. Her father "had been in a stable relationship with a woman for 8 years". The atmosphere in Karolina's family home can be characterized as traumatizing. Since childhood she was raised by perpetually bickering parents. Her father

¹⁶ See D. Silverman, *Interpreting Qualitative Data. A Guide to the Principles of Qualitative Research*, London 2011.

¹⁷ See K. Konecki, *Studia z metodologii badań jakościowych*, op. cit.

was constantly absent, and poor communication was evident even before the divorce.

When I went to elementary school, things started to break down between my parents. They started arguing, bickering, something was wrong [...] Often, when I was little, my father would go to Sweden for a few months and when he came back everything was fine, and then after some time it was bad again, they argued. They bickered.

The psychological defence mechanism of denial masks the deep and painful trauma she experienced even before the divorce. After several years, growing tensions in her parents' disintegrating marriage led to a disruption in Karolina's sense of security. She emphasizes her helplessness in the face of family problems:

And I watched it all from the side [...] The arguments, that. I wanted all this to be next to me, but unfortunately it didn't work out, as I was watching it, it definitely affected me. I always said so, that it doesn't affect me, that it's their life. But I was deceiving myself, it wasn't true [...] I was suppressing everything somewhere inside me.

Anna was the only one who experienced her parents' divorce when she was a small child, she was four years old and does not remember this event. The cause of the divorce was alcohol, not infidelity as in the previous case.

They divorced when I was four years old. I was very little, and frankly speaking I don't remember it very well. [...] Later my mother told me that my father used to drink, and I think that's why my mother divorced him. Because she didn't want an alcoholic husband and a troublemaker at home. Of course my parents argued, but that was when my dad would come home drunk and make fuss about something. [...] It has always been a normal situation for me.

According to the girl, at the moment their contacts are relatively good.

Dad comes to visit us, visits us, lives with us. Then he moves out to his apartment. Well. We still keep in touch. [...] We always worry about each other. We think about what's going on over there. I can say it's a bit strange, because my parents are divorced, but they still keep in touch, sleep together, meet up.

Dominika also comes from a dysfunctional family, conflicted and arguing. Her father left in 2001 for another woman.

My dad separated from my mom 7 years ago in 2001. At first because of some infatuation with another woman. [...] My mom was very upset as it was after 20 years of relationship that he separated. [...] Once they said that my father left because he was waiting for us to come of age. And that was true because I was 18 and my sister was 17. And so he left.

It can be assumed that before the divorce a certain coalition was formed between the daughters and the father, a subsystem that excluded the presence of the mother. Dominika rationalizes her mother's decision to stay home during vacations with the fact that she was tired of taking care of the children.

Dad was a big sportsman all his life. He played sports. [...] we took all the vacations with dad, mom stayed at home. She was more of a homebody. Before, when they were going out together, of course they travelled together. Then I think she got tired, because she took care of us all her life. Well, dad was always at work, as a man always is. He used to come [...] and go to trainings.

After the separation from her husband, Dominika's mother shifted her aggression from her husband to her daughter, whom she also turned against her father.

Mom was very upset. And that had an impact on me, you know. I was so unaccepted by my mother. [...] All my life I only liked my daddy. My mother told me so when he had just split up with my mother. [...] At first, right after the breakup, mom hated me. She blamed me for everything. She couldn't look at me because she knew I looked like him. Every face, every behaviour, you're like daddy. You're like daddy. [...] For a long time I resembled my dad

very much. But with time our relations started to rebuilt somehow. Then I started to support my mom.

An intergenerational coalition was formed between the mother and the daughter against the father. Dominika became entangled in the divorce process because she wanted to meet her mother's expectations in order not to lose her.

[...] But as time passed and she saw my attitude towards all this, the fight for child support became necessary. And when it came to the court hearing, it was hard for me too, I cried. My dad disowned us completely, saying some very ugly things in court [...] My dad completely pushed us away, he didn't want to see me or my sister, he didn't want to talk to us. He didn't pay any money for us. It was as if he didn't know us. He didn't say good morning to my mom on the street.

The fighting between Dominika's parents led to the destruction of her relationship with her father. The mother, being an obsessive estranger, made the girl stop relying on her own opinions, taking on the negative image of her father from her betrayed mother. She became a tool in the fight during the trial.

Well, my mom fought for that money for us. Good thing the judge called me. Because I think that only my sister, who's a year younger than me, would have been more affected by it. Well, I'm glad that didn't happen, because she still has that love for her father. She respects him. And it kind of made a big impression on her, I don't know. But she still values him, still wants to keep in touch, still wants [...] him to be there. She really cares about it, she really needs it. I also need it, but on a completely different level. As a friend. For example to get advice.

As a result of the division of property after the divorce, the flat where Dominika's mother lives was divided between the spouses. This is another reason that prevents the homeostasis of the family system.

It's a strange situation, because my dad is currently living [...] with my grandfather, his father. [...] he is 98 years old.[...] his sister got the whole

apartment after the grandfather and he will have nowhere to go. And he will come home. My mom will live in one room and my dad will live in the other room, God forbid with his woman. I don't wish my mother such a life. For today, I want my dad to live the life he's chosen. He's chosen this path.

All three girls have developed the defence mechanism of fantasizing. On the one hand, they are happy that their parents have separated, because they were fed up with the arguments between them, but at the same time one gets the impression that they still dream of being together again. This is evidenced by the number of statements about their parents getting back together.

(Ania): I would certainly prefer us living together, having a family, but I think that if we were to be together and our parents were to quarrel, argue, call each other names and do other things, I would rather they split up. [...] It would certainly be easier financially and emotionally. But I also say that if [...] my parents were to quarrel and still be together I would rather they were apart.

(Dominika): Right now, I wouldn't want him to come back. I just want her to have peace and quiet. I just want her to have her own place.

(Karolina): I said right away that if you want to get back together, I won't live there, I'll move out. Because I don't want to go through that again. And I decided that there was no point in them being together if they were to argue and I had to go through all that and so on, it was really tiring, sometimes you can't stand it anymore. For example, I said that if they got together, I wouldn't want to be there in that house. Because I know that everything will be super fine between my parents, and then there will be arguments again, yelling.

In Karolina's opinion, it seems that her parents' post-divorce relationships are quite good, thus setting the right example for her daughter. Despite some dysfunction, there has been an apparent homeostasis in her family. They are still able to care for each other and relate to each other with respect. The girl observes her parents closely and draws conclusions about what is good.

(Karolina): Relations between us are stable now [...] We meet occasionally. [...] He comes for every women's day, he tries to remember, he comes with flowers. [...] He asks how mom feels, when mom is sick he always brings some medicine. [...] He treats mom like a woman, not like an object. Even though he divorced her.

The study found that none of the girls currently have a good relationship with their father. Their contacts are rare, which is influenced by many factors. For each of them the reason for this state of affairs is different. At the same time, all three declare that they would like to have a better relationship with their father, to be able to hug and talk to him. In this case, the denial mechanism is at work.

(Karolina): I also, for example, say that somewhere I don't need a father and so on, but I am fooling myself. Everyone needs both parents. Both mom and dad. And somewhere in there I definitely miss my father [...] My mother asked me once if I miss my father and I said that I don't, but somewhere deep inside I just feel a longing.

Even though her father hurt Karolina, she still misses him, but she carefully hides her feelings. Similar suppressed emotions are manifested by Ania and Dominika.

(Ania): I'd rather he hugged me and stroked me than gave me this 50 PLN.

(Dominika): I might want a hug, but it's so...

Karolina has never had a good relationship with her father, there has never been a well-developed daughter-father subsystem.

He always complained to me about why I needed this or that, a new jacket or shoes, and there was always a problem arguing about it. [...] When he lived with us when I was younger, it was terrible. We argued about everything all the time. [...] He used to nag me for everything. I mean he oppressed me. He picked on me for various things. We argued all the time.

The emotional bond with the father was upset.

I was just so nervous. At times, I really couldn't stand it anymore. Dad has no patience for children. I remember when he was teaching me math at school, it was really hard, he used to shout at me, I don't know, call me names. [...] he's not fit for a family. [...] he's not really mature enough to have a family and I don't know if he will. He shouldn't have started a family. It seems that her father always had exaggerated ambitions for her, which the girl was unable to fulfil. He's also made up his own ideal of a little daughter.

Anna also does not have a good relationship with her father. In her opinion, he is a boozier and a troublemaker.

There is a distance between them. My relationship with my dad is a little bit worse [...] he is so haughty [...] there is a big distance between us. [...] Dad is such a man that he wouldn't accept any boyfriend. of mine [...] Dad also likes to drink sometimes. And recently when he came and my mom didn't want to let him in because he was drunk and she doesn't want to talk to him when he's drunk, he just wanted to get in the door, broke off the handle and we had to call a locksmith. She resents her father for not being able to show her affection. It always hurt me that my dad would say I love you because I give you so much money. And that's not what it was about. That's what I'd like to mention as the relationship between me and my dad, because he always said I love you because I give you this much and that much money, and I'd rather he just hugged me, stroked me, than gave me that 50 PLN.

Dominika was the only one who was the so-called daddy's girl, she idealized her father, considering him her authority. At first she formed a coalition with him. Everything changed when she was about fifteen and caught him cheating on her. This was a pivotal moment in their relationship. From that point on, their relationship changed. Her father never talked to her about what happened. He did not try to explain to the child what she had witnessed. The girl personifies her father's rejection through the fish.

Before that, I was maybe 15, 14 years old. We once came home from a vacation from a shared lake house and found my dad with his lover. I mean mistress. With a young girl in bed together. Mom said something and told

dad to pack his things. And told him to think it over. I thought they'd split up, but they didn't. Dad arrived with a bouquet of flowers. He apologized to Mom. After a week of being apart, I guess. He never talked to us about it. I was keeping an aquarium at that time. And I came home, and the first thing I saw was all the fish floating on top, cooked [...] the aquarium had been neglected. I don't know. I guess he didn't feed them or some hot water splashed all over there. So at first, it was a big experience for me, then when I entered the room and saw a young girl in bed, I started to call her names. I started using ugly words. I insulted her there. And I remember that my uncle brought us from the summer house that day, because my dad supposedly didn't have time, and my uncle explained to us that this happens in the movies and in real life it's the same. I'll never forget that; it happens in the movies and it's the same in real life.

The decision about divorce changed her father's image in her eyes. The girl stopped talking to him and said that he was not an authority figure for her anymore.

Then when one day he came up to me and said that Dominika didn't want to talk to me at all anymore and I said that she was no longer an authority figure for me.

This statement is indicative of the father's attempts to establish a relationship with his daughter who created an emotional distance between them, excluding him from the family system. She stopped perceiving him as an ideal father. The account shows that only her sister, who was not involved in the trial, still preserved the image of a loving daddy who could be relied upon, and thus did not become a party to the conflict. Dominika was filled with anger for what had happened. She shifted the blame for the divorce onto her father, and the love, care, and devotion of her parent was forgotten. This is a stage called de-idealizing the father, characterized by aggressively questioning his authority.

We had nothing in common. There was an everlasting war between us. [...] Dad criticized me a lot for that. And we both called each other names. We were unkind to each other. It was like that. From such great love to such great hatred.

On the other hand, Karolina's family is characterized by a lack of communication, alienation of individual members of the system. The unannounced departure of Karolina's father had a devastating effect on her psyche and became a turning point in their relationship. Even though she had previously sensed that her parents were not happy with each other, neither she nor her mother expected her father to file for divorce.

My dad didn't talk about the divorce at all, we were surprised by it, the summons came for the divorce hearing. I was surprised in general, but I even wanted them to get divorced. [...] Dad didn't say anything. It's always been typical of him that he doesn't say anything, he just does it by surprise. When the petition for divorce came, I was completely shocked. A day after we received it, I was on my way to school and on the bus I was crying, because it had come to me, somehow I was surprised and I couldn't, I was driving and crying, it was a shock. Even though I wanted them to get a divorce, it was a shock [...] it wasn't pleasant for me or my mom. When I met him a few days later, I told him off and my dad said: Say what you want, after all you wanted us to get divorced. Well, yes, but you could have warned us that you were filing for divorce, not all of a sudden [...] And he didn't say anything, he just laughed.

She was also shocked to learn that her father had remarried without informing either his daughter or his ex-wife. Karolina heard about it from her mother and afterwards she called her cousin who lived in the same block as them. It turned out that her father had forbidden the whole family to talk about the incident. During that conversation she also learned that she would have a half-sister. This indicates a very poor emotional relationship between her and her father.

Anyway, my dad got married to that woman. That year in February. He didn't say anything either. I found out by complete surprise. By accident. Mom found out in time. Through some random, indirect source. When she told me, I took it easy, too. Well, he made a life for himself, O.K. That's his business. He has the right to it. [...] But after half an hour it hit me that he had got married and hadn't told me anything, his own daughter. I was simply shocked. I couldn't stand it. [...] My father even didn't allow anyone

to talk about the fact that he'd married. It killed me completely. He simply outdid himself.

Initially, Karolina did not want to meet her father's new wife, even though he had been involved with her for eight years. The father was striving for this, but the daughter was reluctant. Perhaps that was the main reason for the fact that the father decided to conceal his wedding from her. He knew perfectly well that his daughter did not accept him and there was no point in insisting further.

Karolina changed her decision only when she found out that she would become a sister. I met Aśka, dad's wife. After that I didn't want to know her. Although a few times my dad tried to get us together, but I didn't want to. But finally I found out that she was pregnant and I thought that if I was going to have siblings, it would be a good idea to meet her. So we met. And it wasn't so bad.

Perhaps the girl thought that if she liked her father's new family, it would be equivalent to betraying her mother. So she preferred to dismiss her father's new partner, which is a certain defence mechanism. The father formed a new family, and the girl entered into a coalition with her mother. They created a certain homeostasis by excluding her father from the system.

Karolina, like Dominika, rationalizes the problems between her parents and sees her father as a womanizer who left her mother for a younger woman. It is easier for her to shift the blame to her father than to destroy her mother's ideal image. At the same time, at the very beginning of the interview she emphasized that even before the divorce her father had been in a steady relationship with a woman for eight years. Karolina's conclusion that her father was a womanizer was not based on her own opinions, but on her mother's. This is evidenced by her statement, which emphasizes that her mother felt he had been cheating on her.

Even though my father had such a penchant for women, he was a ladies' man, and my mother said that she felt that he had had some women there, but they were fleeting relationships. They were kind of, how shall I say, that kind of thing. Just to get in the sack and that was it.

Dominika's father has become an example of promiscuity and lack of stability in his feelings. Just like Karolina she calls him a womanizer.

The man I knew until then was my dad I loved him very much, he was the ideal of every little girl's dad and everything just changed so dramatically. Now I know my dad as a womanizer. I know him as a grown up man with a kid inside him all the time. Now he's currently been with a girl, probably for 4 years, who is 25 years younger than him. He doesn't really have any plans. He doesn't live with her. She has a son. It just kind of happened. I suspect it was only to get laid.

As a result of the presence of dysfunction in each of the families, the girls had a disrupted mother-daughter relationship. In the family system, after the father's departure, the roles played by each family member changed. All three rejected their fathers outside the family system, forming intergenerational coalitions with their mothers, with whom they have a friendly relationship. They can talk to each other about anything and confide in each other.

(Dominika): She is my friend. We confide in each other about everything.

(Karolina): I have always had better contact with my mom than with my dad. [...] We don't keep secrets from each other. [...] You know, when two women are under the same roof, sometimes there's some tension [...] and there are arguments.

(Ania): I can talk to my mom about everything, I can tell her everything. [...] I have a really good contact with my mom. We are like friends. I can ask her anything and I know she will do it for me.

In the case of Karolina and Dominika, after forming a coalition with their mother, the role played by the girls in the family was disturbed, and the mechanism of projection of their mother's problems by their daughters occurred. The girls became their mothers' therapists, supporting them at every step. Karolina feels emotionally obliged to support her parent. She prefers to conceal her own feelings or lie hoping to comfort her. She tries to protect her mother

because she knows that she suffers because her husband left her for another woman.

Even for a moment I was reassuring my mother that the divorce petition had finally come.[...] So that I would try to reassure my mother and myself. Then I come home and don't tell my mother this, because it still hurts her, because she was involved with my father for almost 30 years. [...] For my mother I am still an only child.

Although she is happy to have a younger half-sibling, she pushes these feelings out of her consciousness, thinking that revealing them could cause her mother pain.

I am a half-sister and I am really happy about it [...] although I try not to say that I love my sister in front of my mother, because it might hurt her. This is her ex-husband's child with another woman. I try not to talk about it too much because it hurts her. Sometimes she tries to say okay, stop saying things like that.

Because the family is a self-regulating system, it strives for homeostasis, or balance. Both Ania's and Karolina's mother found a new partner to replace her husband in the family system. This led to the girls' rationalization mechanism. Both believe that their mothers did this out of fear of loneliness. This is confirmed by Karolina's statement:

My mother [...] seems to have someone, but it is a sick relationship, so to speak. Mom does not love this guy, she just does not want to be alone. Mom sometimes misses dad.

At the same time they both downplay the value of these new partners.

INTERPRETATION AND RECOMENDATIONS

Families in the 21st century are forced into a constant struggle to maintain homeostasis in the system. They can achieve it through transformation or by one member leaving the system, which is sometimes the

only chance to maintain balance. Therefore, the number of divorced families, not necessarily dysfunctional, in which more and more children are being raised, is increasing. This phenomenon affects their further functioning in the society, which inspired us to undertake research on this topic, for which we selected three children from divorced families. The research conducted on the children's perception of their parents from divorced families revealed that they have only seemingly a good opinion of their parents.

Divorce can have a positive or negative impact on child's development, with the way conflicts are resolved in the family playing a crucial role. It can be resolved positively, leading family members to grow and challenge their love. In the case of a negative resolution of the crisis in the family system, an individual falls into depressive states, seeks to justify his or her behaviour by activating defence mechanisms such as rationalization, projection, fantasizing, isolation, regression, repression, or resignation. This results in a developmental decline, which entails further changes in behaviour and experiences.

The conducted research shows that none of the respondents has dealt with the consequences of their parents' divorce. The effects of this traumatic event can be felt even many years after the divorce, and affect many aspects of their lives, mainly interpersonal relations and perception of themselves and the surrounding world. Children from divorced families often blame their parents for their failures in life. They are afraid of entering into permanent emotional relations with other people for fear of rejection. As in the case of Urszula Sokal's work, the research shows that the girls were unable to establish intimate contacts, for fear of their partner's betrayal. They also avoid conflict situations, which stems from their experiences from a divided family. They prefer to live with only one parent rather than risk participating in subsequent quarrels. A similar thesis can be found in the works of Henryk Cudak, Jadwiga Izdebska and many other researchers. They emphasize that divorce cannot be considered only as a negative experience, because children strive for peace and improvement of the family atmosphere.

Research has shown that children from divorced families have better relationships with their mothers than with their fathers. Similar suggestions were also made by Józefa Pielkowa. According to her research, 2.5% of children had a negative attitude towards their mothers,

while 81.1% towards their fathers. This, however, is not related to the syndrome of one parent being isolated, contrary to what Richard A. Gardner argues in his research. He believes that the mother's actions alienate the father and worsen his relationship with the child. In the case of the examined subjects, the bond between them was broken due to a lack of effective communication, but this cannot be seen as a negative role of the mothers. It turns out that they care about good relations between their children and ex-husbands¹⁸. Only in one case was the child drawn into the conflict surrounding the divorce, but the child stopped idealizing the father even before the divorce. In the case when the divorce was caused by the father's departure to another woman, the mechanism of depreciation of his new partner occurred, as well as the mechanism of rationalization in the form of perceiving the father as a womanizer.

In all cases the daughters had friendly relations with their mothers, formed coalitions with them and became their therapists, while idealizing them. Mothers who lack emotional support in their husbands seek it in their children, which is consistent with the research conducted by Józef Rembowski¹⁹. In such situations the emotional bond, though strong, is marked by emotional possessiveness. Although problems have been transferred from mothers to daughters, the girls can only rely on their assessment of the situation in the family.

The following conclusions can be drawn on the basis of the study:

1. There are no institutions and places of pedagogical and psychological care, which would help children to construct anew the family system and to cope with emotions. Many negative effects of divorce can be avoided by proper work with children.
2. It is necessary to spread the knowledge that divorce causes harm to all members of the family, not just the spouses. Oftentimes parents unknowingly hurt their children. Among other things, this information should also be provided in the process of teacher training.

¹⁸ See R. A. Gardner, "Parental Alienation Syndrome vs. Parental Alienation: Which Diagnosis Should Evaluators Use in Child - Custody Disputes?", *The American Journal of Family Therapy* 2002, vol. 30, p. 93-115.

¹⁹ See J. Rembowski, *Rodzina w świetle psychologii*, Warszawa 1986.

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PARENTIFICATION AS A PROCESS OF ROLE REVERSAL IN THE FAMILY¹

ABSTRACT:

The study presents the issue of parentification, i.e. the child undertaking tasks belonging to adults. As a result of role reversal in the family, a child sacrifices their own needs for the sake of the instrumental and/or emotional needs of the parent. Parentified children have to cope not only with duties exceeding their normal abilities, but also in adult life they experience the effects of the role reversal in the family. More often than not, parentification is transgenerational and the mechanism of its emergence involves at least three successive generations, with a particular focus on role reversal with one's own parents. The aim of this study is to disseminate knowledge about the causes, conditions and prevention of parentification. Parentification of children in the family results from an intergenerational message and promotes the development of personality disorders.

KEYWORDS:

parentification, child, family, parental role, psychotherapy

It would not be an exaggeration to point out at the beginning of this study that each author of a scientific text should explain not only to

¹ Originally published: Wiktor Żłobicki, "Parentyfikacja jako proces odwrócenia ról w rodzinie", *Wychowanie w Rodzinie* 2018, vol. XIX, no. 3, p. 341-353.

himself, but also to the readers, why she/he takes up the topic presented in the title. Therefore, I would like to emphasize that the decision to address the problem of parentification in this study has its source, first of all, in my scientific interest in pedagogy of the family and my experiences in psychotherapeutic practice and certainly has nothing to do with manifestations of publication absurdity and obsession with earning 'points' that interfere with free scientific expression. It should be added that the issue of parentification – so strongly rooted in the family – is addressed by psychologists in many studies, but seems to be hardly present in the field of pedagogical reflection. In the further part of the study I will try to justify in more detail the need for increasing the interest of educators in the causes, conditions and consequences of parentification.

If we consider the ponderings presented here as the subject of interdisciplinary scientific reflection on the borderline of psychology, psychotherapy and pedagogy, I hope that it will mean the invitation to move in the area of broadly understood humanities. Without it, as it seems to me, it is impossible to understand the complexity of the surrounding reality. I will refer here to the work of one of the most outstanding humanists of the 20th century, Erich Fromm, whose views do not lose their topicality and are very inspiring also in the 21st century. Erich Fromm represents *normative humanism*, which means that "there are right and wrong, satisfactory and unsatisfactory solutions to the problem of human existence. Mental health is achieved if man develops into full maturity according to the characteristics and laws of human nature"².

Many clients³ who seek psychotherapeutic support reveal biographical experiences that clearly indicate disturbances in their families of origin, consisting in taking over the roles belonging to parents in childhood, with simultaneous atrophy of important childhood developmental needs. Parentification can be considered a developmental disorder originating in the family environment, as emphasized by Katarzyna

² E. Fromm, *The Sane Society*, London, New York 2002, p. 14.

³ In this study I will be using the word *client* for two reasons: firstly, linguistically it refers both to male and female gender; secondly – it refers to a human being who is perceived not as a patient but rather as a *person* remaining in psycho-therapeutic relationship, in Rogers's approach.

Schier in her study on psychological role reversal⁴ in the family, representing the view that “Parentification in the family involves an action-related and/or emotional role swapping in which the child sacrifices his or her own needs, such as attention, safety, and receiving developmental support, in order to align with and care for the instrumental or emotional needs of the parent”⁵. Thus, if a parent modifies pursuing their own role in order to have some their needs satisfied by the child, in consequence the parent forces the child to neglect his or her own needs.

It seems important to distinguish two types of role swapping in the family: the first is referred to as *instrumental parentification*, while the second as *emotional parentification*. Instrumental parentification means, among other things, that the child takes care of such aspects of the family’s existence as earning money, caring for siblings or an ill parent, cleaning, shopping, cooking meals. It can be assumed that this kind of parentification is fostered by many contemporary social phenomena, such as single parenthood, economic emigration or the arrival of a large group of families from across the eastern border. In such families, a number of tensions may arise as a result of the lone parent delegating his or her excessive responsibilities to the child, or, in the case of immigrant families, the child assuming the role of a culture guide, translator, or person jointly responsible for the economic well-being.

On the other hand, a child experiencing emotional parentification may be cast in a variety of roles: a caregiver for a parent suffering from depression or mental illness, a confidant or comforter for one of the parents, a mediator or referee in marital conflicts, and a partner (also sexual)⁶. An example of the mechanism of the child’s emotional parentification was vividly presented by the well-known psychotherapist Wojciech Eichelberger in his book under the significant title *Zdradzony przez ojca* (*Betrayed by his Father*):

⁴ The literature on parentification uses the terms *role reversal* and *role swapping* interchangeably.

⁵ N. D. Chase, *Burdened Children. Theory, Research and Treatment of Parentification*, London, New Delhi 1999, p. 5, after: K. Schier, *Dorośle dzieci. Psychologiczna problematyka odwrócenia ról w rodzinie*, Warszawa 2018, p. 22.

⁶ See M. Kościelska, *Odpowiedzialni rodzice. Z doświadczeń psychologa*, Kraków 2011, p. 17-20; and also G. J. Jurkovic, A. Thierkield, R. Morrell, “Parentification of Adultchildren of Divorce. A Multidimensional Analysis”, *Journal of Youth and Adolescence* 2001, vol. 30, p. 245-257.

Sometimes it happens that the father does not feel connected to the mother. Then, by assigning us the role of 'mommy's son', he simultaneously delegates us to take care of our mother, in a way replacing him. This can be followed by a sense of guilt towards her. As if he were saying: 'You know, I'm not particularly interested in you, my dear, but I'm giving you a son, he'll certainly love you'. And then we are tossed to the mother. Whether we want it or not, we become a support for our mother. It is a difficult situation. It fosters the development of an illusory image in our mind of our relationship with our mother. We may think that we are more important for our mother than our father [...]⁷.

It is important to know that such role swapping can go on for years in even more subtle and disguised forms.

It is worth noting that an important element in diagnosing the intensity of the phenomenon of parentification in the family depends on the proportion between the child's involvement in adult roles and the clear and overt appreciation of the activities performed by the child. The excessive effort of the child, if it is noticed and appreciated, may not have such a destructive influence on his or her psyche and rather lead to the development of a sense of responsibility and psychological maturity⁸. More often, however, a role reversal is destructive in nature, facilitated by the co-occurrence of disruptions both in the satisfaction of important developmental needs of children and in the fulfilment of parental roles. For example, research has shown that those experiencing parentification are more often only children, children of both genders born first, or the eldest daughters⁹. Other studies have also noted gender differences in the tasks children are burdened with, with girls more likely to be involved in the household and caring for family members, while boys are more likely expected to earn money and be cast in the role

⁷ W. Eichelberger, *Zdradzony przez ojca*, Warszawa 1998, p. 28.

⁸ See K. Schier, *Dorosłe dzieci*, op. cit., p. 280-281.

⁹ See J. Byng-Hall, "The Significance of Children Fulfilling Parental Role. Implication for Family Therapy", *Journal of Family Therapy* 2008, vol. 30, p. 147-162; L. M. Hooper, J. De-Coster, N. White, M. L. Voltz, "Characterizing the Magnitude of the Relations Between Self-Reported Childhood Parentification and Adult Psychology. A Meta-Analysis", *Journal of Clinical Psychology* 2011, vol. 67 (10), p. 1028-1043, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 25.

of maternal confidants¹⁰. In studies of adult children from families with alcohol problems, they were found to display significantly higher levels of parentification than adults whose parents were not alcohol dependent¹¹. Subsequent researchers have also shown that daughters, rather than sons, were more likely to take on the tasks of alcoholic parents¹². It is also worth mentioning that parentification in the family is not always experienced by all children, because often the most sensitive and responsive child is chosen for this role¹³. The study also confirmed high probability of parentification of a child in the situation of conflict between parents. When one parent withdrew from the marital relationship, the other parent, who was abandoned, sought attention and solace from the child¹⁴. It is also assumed that parentification is intergenerational and its mechanism should be considered in relation to at least three successive generations, and certainly to the role reversal with one's own parents¹⁵.

Researchers emphasize the relationship between relational trauma resulting from parentification and the nature of professional work related to helping. It is assumed that people who choose the profession of, for example, a psychotherapist, a psychologist, a teacher, a doctor or a nurse, have often experienced parentification in the family.

¹⁰ See L. Burton, "Childhood Adultification in Economically Disadvantaged Families. A Conceptual Model", *Family Relation* 2007, vol. 56, p. 329-345, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 25.

¹¹ See N. D. Chase, M. P. Deming, M. C. Wells, "Parentification, Parental Alcoholism and Academic Status Among Young Adults", *American Journal of Family Therapy* 1998, vol. 26(2), p. 105-114, after: K. Gąsior, *Funkcjonowanie psychospołeczne i problemy psychiczne dorosłych dzieci alkoholików*, Warszawa 2012, p. 87.

¹² See M. L. Kelley et al., "Parentification and Family Responsibility in the Family of Origin of Adult Children of Alcoholics", *Addictive behaviours* 2007, vol. 32(4), p. 675-685, after: K. Gąsior, *Funkcjonowanie psychospołeczne i problemy psychiczne dorosłych dzieci alkoholików*, op. cit., p. 80.

¹³ See J. M. Ohntrup, E. Pollak, A. Plass, P. Wiegand-Grefe, "Parentifizierung – Elternbefragung zur destruktiven Parentifizierung von Kindern psychisch erkrankter Eltern", [in:] *Kinder mit psychisch kranken Eltern. Klinik und Forschung*, ed. P. Wiegand-Grefe, F. Matejat, A. Lenz, Göttingen 2010, p. 375-398, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 25.

¹⁴ See J. Macfie, R. M. Houts, A. P. Pressal, M. J. Cox, "Pathways from Infant Exposure to Marital Conflict to Parent-Toddler Role Reversal", *Infant Mental Health Journal* 2008, vol. 29(4), p. 297-319; after: A. Łączyńska, "Zaburzenia procesu mentalizacji jako mechanizm wyjaśniający związek między tendencją do somatyzacji a odwróceniem ról w rodzinie pochodzenia", [in:] *Zapisane w ciele: związek ciało-psychika u dzieci i rodziców*, ed. K. Schier, Warszawa 2009, p. 42.

¹⁵ See K. Schier, *Dorosłe dzieci*, op. cit., p. 280.

If this has been the case, the best solution is entering psychotherapy, through which one can try to prevent the multiplication of role reversal both in one's own parenting and in the professional space, especially in interpersonal relationships. However, among the above-mentioned professions, no procedures have yet been developed to facilitate the recognition of the manifestations and consequences of parentification, except for psychotherapists who, in the course of their professional training, have an ethical obligation to undertake their own psychotherapy and supervise their work¹⁶.

It is important to observe the relationship between parentification and the nature of the early childhood bond that forms between a young child and parents, especially the mother. This bond is clearly described by Donald W. Winnicott:

The child can keep the idea of the mother or father or baby-sitter alive for so many minutes, but if the mother at that stage is away for two hours, then the *image* of the mother that the child has inside him wilts and begins to die. When the mother returns, she is another person. It is difficult to bring alive the *image* inside himself. For two years or so, the child does react very badly to separation from the mother¹⁷.

The thesis that the nature of the bond between a child and his or her parents, especially the mother, has a significant impact on the child's functioning later in life was developed by John Bowlby, and his bond theory has inspired an international body of researchers¹⁸. At this point, it is worth referring to the conclusions of an experimental study that involved observing infants' reactions to their mothers' absence for a short period of several minutes. On the basis of this research, four types of attachment were distinguished, manifested by characteristic reactions of children¹⁹:

¹⁶ See *ibidem*, p. 268-274.

¹⁷ D. W. Winnicott, *Home Is Where We Start From. Essays by a Psychoanalyst*, New York 1986, p. 146-147.

¹⁸ See among others: *Koncepcja przywiązania. Od teorii do praktyki klinicznej*, ed. B. Józefik, G. Ilńiewicz, Kraków 2008; K. Gąsior, *Funkcjonowanie psychospołeczne i problemy psychiczne dorosłych dzieci alkoholików*, op. cit., p. 81-86.

¹⁹ The description of attachment patterns was developed during the study conducted by the research team supervised by Mary P. Ainsworth as well as the research con-

- *secure attachment* – a child calms down when the mother returns;
- *anxious-avoidant attachment* – while the mother is away, the child shows subtle signs of distress, but does not seek renewed closeness after her return;
- *fearful-ambivalent attachment* – separation from the mother causes severe anxiety in the child, who does not calm down upon her return;
- *disorganized attachment/with disorientation* – the child seeks closeness in a chaotic and inadequate way.

It is assumed that the cognitive patterns shaped in childhood described above are also active in adulthood, although they may undergo some changes. This is important for understanding the mechanisms of psychological disorders. An example of useful in psychotherapeutic practice results of bond research is the AAI (Adult Attachment Interview) procedure, which allows to determine one of four types of attachment: F – secure (autonomous), Ds – avoidant (idealizing), E – overly preoccupied (with anger or passivity), and U – unsettled (with unresolved trauma or loss)²⁰.

Another example confirming that attachment theory can be helpful in understanding and predicting adult's behaviour in relationship with other people is demonstrated by the researchers' identification of three attachment styles²¹:

- *secure attachment style* – when the need for closeness and security was satisfied in childhood in the relationship with parents, then in adult life contacts with other people are accompanied by trust, openness, a sense of effectiveness and efficiency of one's actions, without fear of rejection;

ducted by Main and Judith Salomon – see M. D. P. Ainsworth, M. C. Behar, E. Waters, P. Wall, *Patterns of Attachment. A Psychological Study Strange Situation*, Hillsdale 1978; C. George, N. Kaplan, M. Main, *The Attachment Interview for Adults*, Berkeley 1984, after: C. Żechowski, I. Namysłowska, "Teoria przywiązania a rozwój zaburzeń psychicznych", [in:] *Koncepcja przywiązania*, op. cit., p. 60–61.

²⁰ See C. Żechowski, I. Namysłowska, "Teoria przywiązania a rozwój zaburzeń psychicznych", op. cit., p. 61.

²¹ C. Hazan, P.R. Shaver, "Attachment as an Organizational Framework for Research on Close Relationships", *Psychological Inquiry* 1994, no. 5, p. 1–22, after: R. Cieślak, E. Elias, "Wsparcie społeczne a osobowość", [in:] *Wsparcie społeczne, stres i zdrowie*, ed. H. Sęk, R. Cieślak, Warszawa 2004, p. 72–73.

- *anxious-avoidant attachment style* – when parents in childhood showed detachment instead of closeness, the need for closeness is also suppressed in adult life;
- *anxious-ambivalent attachment style* – when childhood was dominated by inconsistent, inadequate satisfaction of the child's need for security, then the adult desires close relationships and at the same time is very much afraid of them.

It is worth noting here that the contemporary narrative of the role reversal in the family clearly includes Erich Fromm's thinking about constructive maternal love:

Motherly love begins with oneness, and leads to separateness. If the need for fusion were realized in motherly love, it would mean destruction of the child as an independent being, since the child needs to emerge from his mother, rather than to remain tied to her²².

The thesis of Erich Fromm is developed by Fritz Riemann. Pointing out the circumstances and conditions and the destructive effects of emotional parentification in the relationship between the mother and child, he writes:

The curse of maternal love is to keep the child dependent, to demand love and gratitude from him or her, instead of allowing him to develop. If the mother burdens and needs the child's love excessively for herself – because her life is not fulfilled, she is disappointed in the partnership relationship or because, quite simply, she has been left alone with the child – the child experiences guilt in taking developmental steps that require increasingly freeing him or herself from intimacy with the mother²³.

The author's claim is confirmed by the following brief clinical case report. Ms. T., a thirty-year-old woman, entered psychotherapy reporting recurrent anxiety and long-term depressed mood, as well as sexual problems in her relationship with her partner. The client was orphaned at the age of six by her father, whose tragic death caused her mother's

²² E. Fromm, *The Sane Society*, op. cit., p. 32-33.

²³ F. Riemann, *Die Fähigkeit zu lieben*, Berlin 1999, p. 24, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 198.

long-lasting depression, and resulted in the client's behaviour adjusting to the needs of the surviving parent, among others – after her father's death she slept in one bed with her mother for many years, and during adolescence she grew up in the climate created by her mother of an unpredictable, hostile world, full of problems, and unfriendly men.

In the context of the biographical details indicating parentification described here, a question arises about searching for ways to support the client in reaching her/his personal resources so that she/he can recognize the burden of the family past, bear the burden of memories once again, and experience a change in the perspective of seeing oneself. If, in the context of the discussed clinical case, once again we invoke the views of Erich Fromm, we will find a suggestion of a humanistically oriented psychotherapeutic intervention, which seems to be adequate – also in the case of people who have experienced parentification: “The first step necessary to permit this tendency for health to operate is the *awareness* of the suffering and of that which is shut out and disassociated from our conscious personality”. Such action is taken when, for example, “irrational passions [...] feelings of loneliness and futility and longings for love and productivity” have been repressed [...]”²⁴. It seems extremely important that in psychotherapy of parentified persons the therapist takes into account the client's past experiences but cannot ignore the increasingly complex reality experienced by the contemporary man. Thus, reporting the successive stages of Ms. T.'s psychotherapy, it turned out that after completing a questionnaire for the initial recognition of depressive symptoms developed by Aaron T. Beck²⁵, the client followed the therapist's suggestion to contact a psychiatrist. Ms. T. began pharmacotherapy with good results. Continuing the meetings with the psychotherapist in the climate of the therapeutic alliance, the biographical aspects of the relationship with her mother – indicative of parentification – were crucial for the psychotherapy process. Thanks to opening in the process of psychotherapy to deep reflection on emotional aspects of the relationship with the mother, the client incorporated in her everyday life conscious separation and experienced it, setting boundaries, and mature reactions in the relationship with her mother.

²⁴ E. Fromm, *The Sane Society*, op. cit., p. 267.

²⁵ See <http://www.forumprzeciwdpresji.pl/test-becka/>, access: 1.04.2018.

She began to appreciate her femininity, opened to greater sexual closeness with her partner, decided to get married and has real plans for parenthood.

At this point we should refer to the view of Katarzyna Schier who believes that therapeutic work with people experiencing the effects of parentification in adulthood will have a corrective character if²⁶:

- in the relationship with the therapist there is a space for the client to reveal and name his/her own experience of the role reversal in the family;
- the client recognizes his/her own individual needs and distinguishes them from the desires of the parent, which should facilitate work on a realistic sense of self-esteem and the separation of the inner image of self from the image of the parent;
- the experience of parentification is clearly placed in the past so that it will not constitute part of the present, and the client opens up to experiencing grief for the loss of childhood;
- in a relationship with the therapist based on trust, respect, and exchange, the client achieves emotional balance, is able to experience more positive emotions, pays more attention to his/her states of mind, and is ready to explore the intentions of his/her own and other people's behaviour;
- work with the body is also considered when the experience of parentification is reflected in the client's physicality.

Therefore, it is important that in a safe, trusting and respectful climate of the therapeutic alliance, there is a sufficiently deep reconstruction of family histories by the client, with attention to the broader intergenerational perspective of parents whose childhoods must also have been marked by neglect and emotional orphaning.

Emphasizing the importance of the above strategy of psychotherapeutic support for adults who have experienced parentification in their family of origin, we cannot ignore the suggestion of prevention directed at both parents and children. Schier emphasizes that these actions should be directed not only to people from risk groups, but also to the general public²⁷. An important role can be played by psycho-

²⁶ K. Schier, *Dorośle dzieci*, op. cit., p. 247-249.

²⁷ See *ibidem*, p. 277-279.

logists, educators, teachers and tutors in public and non-public educational institutions, both in the area of recognition and diagnosis of the phenomenon of parentification. It also seems necessary to develop professionally conducted psycho-education with the use of workshop methods, mentalization, drama, computer programs, educational films, special publications. It is worth emphasizing the need to intensify such activities because contemporary social and cultural reality favours, and often promotes, the reversal of roles in the family.

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PERFORMING THE PROFESSIONAL ROLE BY TEACHERS WHO EXPERIENCED REVERSING ROLES IN THE FAMILY¹

ABSTRACT:

It is assumed that there is a relationship between the experience of parentification, i.e., the reversal of roles in the family, and the effects of relational trauma resulting from parentification, and the nature of professional work related to broadly understood assistance. Research confirms that people choosing, for example, the profession of a teacher, doctor, psychologist, psychotherapist or nurse, have often experienced parentification in their family of origin. The aim of the study is to draw attention to possible disruptions in performing the professional role by teachers who experienced the role reversal in the family in their childhood. Taking into account the social importance of education system, it seems necessary to carry out representative empirical analyses on the effects of parentification on performing the professional role of teachers and, consequently, undertaking psychoeducational activities.

KEYWORDS:

parentification, family, teacher, professional role, interpersonal relations

¹ Originally published: Wiktor Żłobicki, "Wypełnianie roli zawodowej przez nauczycieli z doświadczeniami odwrócenia ról w rodzinie", *Wychowanie w Rodzinie* 2019, vol. XXI, no. 2, p. 301-314.

This study addresses the issue of parentification, or role reversal in the family, in the context of performing the professional role of a teacher, which has its justification in scientific interests in the overlapping areas of pedagogy, family pedagogy and psychotherapy. The target group of this study are in fact two subjects of the educational process, i.e. students and teachers who have experienced parentification in their families of origin. It should be added that this issue has been addressed primarily in the work of psychologists and, as it seems, should be presented more extensively in the educational reflection.

PECULIARITIES OF THE CONTEMPORARY PROFESSIONAL ROLE OF THE TEACHER

Education is expected to cope with increasingly complex problems arising from dynamic changes in social reality. Sociologists of education and pedeutologists indicate that the ambivalence in educational work stems from the conflicting expectations attributed to the professional role of a teacher. Depending on the circumstances, a good teacher must be²:

- empathetic, yet distanced in their perception of the experiences of others;
- open to the world, but in some respects closed;
- demanding, but also ‘soft’ in assessing others’ failures;
- socialized, but to some extent selfish;
- prepared for both distance and disengagement, as well as direct, good contact with the student;
- understanding but sometimes strictly demanding.

As Henryka Kwiatkowska emphasizes, paradoxically, the realization of these contradictory expectations is a condition of proper functioning in a professional role and becomes an unavoidable feature of many pedagogical situations².

That is why, the process of teacher training is so important, as Kwiatkowska emphasizes, thus indicating the specific nature of preparation for this profession³:

² See H. Kwiatkowska, *Pedeutologia*, Warszawa 2008, p. 201-202.

³ *Nauczyciele nauczycieli. Z teorii i praktyki kształcenia nauczycieli*, ed. H. Kwiatkowska, A. Kotusiewicz, Warszawa 1992, p. 4-5.

- preparing teachers is not limited only to mastering professional knowledge, but above all to using it efficiently in practice;
- in teacher education it is necessary to reject a purely cognitive approach to all problems related to teaching and upbringing;
- teacher qualifications cannot be determined by a specific model of professional activities.

In fact, practicing this profession requires the ability to have a complementary approach to knowledge, methodological and specialized skills. Educators are expected to move away from their traditional authoritarian role and become specialists in comprehensive human development, inevitably being confronted with the increasingly strong trends of contemporary education⁴:

- from imparting knowledge to learning cognitive and existential independence;
- from steering to inspiring development;
- from simple transmission of knowledge to introducing the student to its world;
- from the function of disseminating knowledge to ordering information;
- from the dominance of the intellect to the balance of thoughts and feelings in school education;
- from the teacher's monologue to a dialogue with students.

Therefore, in thinking about contemporary upbringing, the humanistic orientation gains particular importance. According to Stefan Wołoszyn this means, among others, that the educator - teacher⁵:

- perceives every teaching or educational situation as an encounter between self and the other;
- above all, he/she knows how to use himself;
- discovers his/her own unique personality and uses it skilfully as an instrument of pedagogical action;
- treats the acquired theoretical knowledge as an opportunity for personal development and improvement of his/her practical activities.

⁴ H. Kwiatkowska, *Pedeutologia*, op. cit., p. 41-45.

⁵ P. Wołoszyn, "Teoretyczne podstawy systemów kształcenia nauczycieli", [in:] *Nauczyciele nauczycieli*, op. cit., p. 71-72.

Krzysztof Konarzewski's socio-pedagogical narrative seems particularly inspiring from the point of view of this article, as it contains both a description and explanation of the peculiarities of the *teacher's professional role*, as well as reflections on the strategies of coping with the performance of this role. Konarzewski assumed that a social role is "a set of expectations shared by the majority of members of a given community"⁶. What is important is that these expectations define not only how a person belonging to a certain social category should think and what he or she should do, but also what they can demand from other people around them. According to the Author, a role understood in such a way becomes a fact in relation to which a person must take his or her own stance. This makes it possible not only to analyse various difficulties contained in the provision of the role itself, but also to study the ways in which people take a stand on a given role, assuming that the contemporary role of the teacher is "ambiguous, internally inconsistent, psychologically difficult and incompatible with his or her other important roles"⁷.

Taking up the theme of the indicated peculiarities of the teacher's professional role, Konarzewski carries out considerations that are very relevant to the topic of this study. For him, the *ambiguity of the role* is the deficiency and often the lack of agreed upon, concrete and measurable criteria of professional excellence. In other words, this ambiguity means not so much lack of knowledge about what a teacher should do, but rather lack of agreement about how to know that he or she is doing his or her job well. The quality of a teacher's work is not measured by the grades given to his or her students, as these are most often determined by the teacher herself/himself. Even more so, the quality of educational work is not assessed by any achieved results. For example, the independence of judgement inspired and developed by the teacher may be assessed differently by pupils themselves, by their parents, and by an examiner marking the school-leaving examination in the native language⁸.

Another peculiarity is the *internal inconsistency* of the role, which occurs when, under specific conditions, the fulfilment of some expecta-

6 K. Konarzewski, "Nauczyciel", [in:] *Sztuka nauczania. Szkoła*, ed. K. Konarzewski, Warszawa 1998, p. 151.

7 Ibidem, p. 151-152.

8 See ibidem, p. 152-154.

tions hinders or precludes the fulfilment of others. Konarzewski points to three such groups of expectations: supporting the development of an individual student, reproduction of the social order, and introduction to spiritual culture. On the one hand, the teacher is required to have an individualized approach to each student in order to develop his/her potentialities, and on the other hand, the school and teachers select students, often hindering their development. The third group of expectations that the teacher must take a stand concerns the introduction of young people to such forms of spiritual culture as scientific knowledge, art, ethical patterns of life. It often happens that some spiritual values are appropriated in the name of current interests of various social groups and thus they may lose their universal character. The above examples lead to the conclusion that various requirements for the teacher make his/her professional role highly inconsistent⁹.

Psychological difficulty of the role is indicated by the attendant mental costs, for example¹⁰:

- bearing above-average responsibility for each student;
- unpredictability of situations that may arise in a group of students;
- risk of making mistakes and the burden of revealing and correcting them;
- relative irreversibility of the decisions made;
- feeling of helplessness in particularly difficult situations;
- performance of teaching duties at a pace and rhythm imposed by external circumstances;
- demanding attitude of some parents towards the school and the teacher;
- asymmetry in relations with pupils and parents;
- relatively low social status of the profession.

The professional role of the teacher is also characterized by its *incompatibility with other roles*, which particularly concerns women. The feminisation of the teaching profession means that there may be periodic disruptions to regular work with students due to a woman's role as a mother (maternity and parental leaves, sick leaves due to childcare). On

⁹ See *ibidem*, p. 154-157.

¹⁰ *Ibidem*, p. 157-160.

the other hand, the fact that men practise this profession, due to relatively low salaries, may be at odds with the traditionally perceived role of the father (the so-called head of the family) who is socially expected to provide for the family¹¹.

PARENTIFICATION AS AN EXPERIENCE OF ROLE REVERSAL IN THE FAMILY OF ORIGIN

Katarzyna Schier, in her study of psychological role reversal, assumes after Nancy D. Chase that "Parentification in the family involves an action-related and/or emotional role swapping in which the child sacrifices his or her own needs for attention, security, and receiving developmental support in order to conform to and care about the instrumental or emotional needs of the parent"¹².

Another researcher, Gregory J. Jurkovic, defines parentification as the child's experience of being cared for by family members in the following aspects: openness in defining the child's tasks, the type of work undertaken by the child, the amount of responsibility assigned to the child, the appropriateness of the tasks to the child's developmental stage, the person or persons to be cared for by the child, the child's level of internalization of the needs of his or her caregivers, the nature of boundaries within the family, and the social and ethical legitimacy of the child's actions¹³.

This author distinguishes two types of role substitution in the family: former and emotional parentification. The instrumental parentification consists, among other things, in a child taking over the care of such dimensions of family existence as earning money, caring for siblings or an ill parent, cleaning, shopping, cooking meals. The occurrence of this kind of parentification is fostered by contemporary social phenomena, for example: single parenthood, economic emigration or the appearance of

¹¹ See *ibidem*, p. 160-161.

¹² N. D. Chase, *Burdened Children. Theory, Research and Treatment of Parentification*, London, New Dehli 1999, p. 5, after: K. Schier, *Dorośle dzieci. Psychologiczna problematyka odwrócenia ról w rodzinie*, Warszawa 2018, p. 22.

¹³ See G. J. Jurkovic, *Lost Childhoodp, The Plight of the Parentified Child*, New York 1997, after: K. Schier, *Dorośle dzieci*, op. cit., p. 22.

a large group of families from across the eastern border. In single-parent families excessive responsibilities of the lone parent may be transferred to the child, economic emigration of one or both parents may lead to transferring part or even all of the parental duties to the child, and in the case of immigrant families the child may play a role of a guide, translator, or even a person co-responsible for economic well-being. On the other hand, a child experiencing emotional parentification may be cast in various roles: a caretaker of the parent suffering from depression or mental illness, as a confidant or comforter of one of the parents, a mediator or judge in marital conflicts, and a partner (also sexual)¹⁴.

It is worth noting that an important element of the intensification of the phenomenon of parentification in the family is the proportion between the child's involvement in adult roles and the clear and overt appreciation of the activities undertaken by the child. The excessive effort of the child, if it is noticed and appreciated, may not have such a destructive influence on its psyche and rather lead to the development of a sense of responsibility and psychological maturity¹⁵. However, more often than not, the role reversal is destructive, facilitated by the co-occurrence of disruptions both in terms of satisfying important developmental needs of children and the performance of parental roles. It is worth noting that this role swapping can go on for years in even more subtle and hidden forms.

A number of scientific reports indicate that in the family system the first-born children and only children are exposed to parentification, especially girls, because daughters, usually the oldest ones, are involved in performing parental functions, and helping others is inherent in the stereotype of the female role¹⁶. Thus, the feminization of the educational environment appears to increase the likelihood of

¹⁴ See M. Kościelska, *Odpowiedzialni rodzice. Z doświadczeń psychologa*, Kraków 2011, p. 17-20; and also G. J. Jurkovic, A. Thierkield, R. Morrell, "Parentification of Adult Children of Divorce. A Multidimensional Analysis", *Journal of Youth and Adolescence* 2001, vol. 30, p. 245-257, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 22.

¹⁵ See K. Schier, *Dorosłe dzieci*, op. cit., p. 280-281.

¹⁶ See P. Zukow-Goldring, "Sibling Caregiving", [w:] *Handbook of Parenting*, Mahwah, New York 2002, after: J. Żarczyńska-Hyla, B. Zdaniuk, J. Piechnik-Borusowska, E. Karcz-Taranowicz, B. Kromolicka, "Uwarunkowania parentyfikacji doświadczanej w dzieciństwie i okresie dorastania z perspektywy młodych dorosłych", *Rocznik Andragogiczny* 2016, vol. 23, p. 203.

disruptions in occupational functioning as a result of parentification. Other studies have also recorded gender differences in the tasks that children are charged with, with boys more likely to earn money and be cast in the role of maternal confidants, while girls are more likely to care for family members and take care of the household¹⁷. In studies on adult children from families with alcohol problems, they were found to have experienced significantly higher levels of parentification than adults whose parents were not alcohol dependent¹⁸. Other researchers have also shown that daughters, rather than sons, were more likely to take on the tasks of alcoholic parents¹⁹. It is also worth mentioning that parentification in the family is not always experienced by all children, because often the most sensitive and responsive child is chosen for this role²⁰. The studies also verified the high probability of parentification of a child in a situation of conflict between parents, when one parent withdrew from the marital relationship, the abandoned one sought attention and solace from the child²¹. It is also assumed that parentification is intergenerational and its mechanism should be considered in relation to at least three successive generations, and certainly role reversal with one's own parents²².

¹⁷ See L. Burton, "Childhood Adultification in Economically Disadvantaged Families. A Conceptual Model", *Family Relation* 2007, vol. 56, p. 329-345, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 25.

¹⁸ See N. D. Chase, M. P. Deming, M. C. Wells, "Parentification, Parental Alcoholism and Academic Status Among Young Adults", *American Journal of Family Therapy* 1998, vol. 26, p. 105-114, after: K. Gąsior, *Funkcjonowanie noo-psychospołeczne i problemy psychiczne dorosłych dzieci alkoholików*, Warszawa 2012, p. 87.

¹⁹ See M. L. Kelley et al., "Parentification and Family Responsibility in the Family of Origin of Adult Children of Alcoholics", *Addictive Behaviours* 2007, vol. 32, p. 675-685, after: K. Gąsior, *Funkcjonowanie noo-psychospołeczne i problemy psychiczne dorosłych dzieci alkoholików*, op. cit., p. 80.

²⁰ See J. M. Ohntrup, E. Pollak, A. Plass, P. Wiegand-Greffe, "Parentifizierung – Elternbefragung zur destruktiven Parentifizierung von Kinder psychisch erkrankter Eltern", [in:] *Kinder mit psychisch kranken Eltern. Klinik und Forschung*, ed. P. Wiegand-Greffe, F. Mattejat, A. Lenz, Göttingen 2010, p. 375-398, after: K. Schier, *Dorosłe dzieci*, op. cit., p. 25.

²¹ See J. Macfie, R. M. Houts, A. P. Pressal, M. J. Cox, "Pathways from Infant Exposure to Marital Conflict to Parent-Toddler Role Reversal", *Infant Mental Health Journal* 2008, vol. 29, p. 297-319, after: A. Łączyńska, "Zaburzenia procesu mentalizacji jako mechanizm wyjaśniający związek między tendencją do somatyzacji a odwróceniem ról w rodzinie pochodzenia", [in:] *Zapisane w ciele: związek ciało-psychika u dzieci i rodziców*, ed. K. Schier, Warszawa 2009, p. 42.

²² See K. Schier, *Dorosłe dzieci*, op. cit., p. 280.

Based on Katarzyna Schier's review of research studies, higher risk groups include adults who experienced family history as children²³:

- an alcohol or other substance abuse problem;
- a chronic physical or mental illness of the parents;
- disabilities of siblings;
- various forms of natural and social orphanhood;
- permanent conflict situations;
- divorce-related tensions.

While invoking numerous foreign publications on role reversal in the family, it is worth emphasizing the growing interest in the phenomenon of parentification also among Polish researchers. An exceptional contribution in this regard is the work of Katarzyna Schier, culminating in an excellent monograph, cited here many times *Dorośle dzieci. Psychologiczna problematyka odwrócenia ról w rodzinie* (*Adult children. Psychological subject matter of role reversal in the family*)²⁴. There are also numerous theoretical, empirical and review works of other authors. The phenomenon of parentification of adults who grew up in families with alcohol problems was addressed by Iwona Grzegorzewska, this issue was also discussed by Krzysztof Gąsior in his monograph²⁵. The topic of the mechanism of role reversal in the family from the intergenerational perspective was raised by Monika Wasilewska²⁶. The relationship between family dysfunctionality and child parentification was presented in the article by Magdalena Błażek²⁷. The overview article by Teresa Rostowska and Judyta Borchet focuses on the specificity and determinants of family roles, the dysfunctional process of role reversal in the family²⁸.

²³ Ibidem, p. 19.

²⁴ See ibidem.

²⁵ See I. Grzegorzewska, "Parentyfikacja w rodzinach z problemem alkoholowym", *Alcoholism and Drug Addition* 2016, no. 29, p. 28-29; K. Gąsior, *Funkcjonowanie noo-psycho-społeczne i problemy psychiczne dorosłych dzieci alkoholików*, op. cit.

²⁶ See M. Wasilewska, "Parentyfikacja jako efekt międzypokoleniowego dziedzictwa traumy", [in:] *Reflection on Psychological Mechanism of Trauma and Posttraumatic Development*, ed. D. Kubacka-Jasiecka, M. Kuleta, Kraków 2012.

²⁷ See M. Błażek, "Parental Attitudes and Parentification of Children in Families with Limited Parental Care Competencies", *Polish Journal of Applied Psychology* 2016, vol. 14, p. 93-108.

²⁸ See T. Rostowska, J. Borchet, "Proces parentyfikacji w kontekście teorii systemowej", *Roczniki Pedagogiczne* 2016, vol. 44, p. 5-21.

The results of a Polish-Canadian team of researchers who analyzed the phenomenon of parentification (frequency, types and determinants) in a group of 1,045 students of pedagogical faculties at the Universities of Opole and Szczecin seem relevant to the topic of this study. It turned out that parentification, i.e. the role reversal among future employees of the education system, correlates with the selected sociodemographic factors, unfavourable random events in the family as well as the features and behaviour of parents. The prevalence of the phenomenon is also surprising, as more than 70% of respondents experienced instrumental or emotional parentification of varying intensity, with one in five indicating a sense of harm because of it²⁹. Role reversal was also qualitatively analyzed in the latest research presented in Barbara Chojnacka's monograph. The researcher, on the basis of adult narratives of people experiencing emotional and instrumental parentification in the family, has distinguished a whole range of roles undertaken in childhood: guardian, educator, servant, defender, advisor, decision-maker, partner, confidant, intermediary, culprit, organizer, and bread-winner³⁰.

THE EXPERIENCE OF PARENTIFICATION AND PERFORMING THE PROFESSIONAL ROLE BY TEACHERS

At this point, it should be noted that the attempt to present the multifaceted, complex nature of the phenomenon of determinants and potential effects of parentification among the teaching profession exceeds the framework of this study. Therefore, in this section I will refer only to some selected aspects of parentification as a source of interference in the performance of the teacher's professional role.

PARENTIFICATION AND THE AMBIGUITY OF THE TEACHER'S PROFESSIONAL ROLE

If role ambiguity indicates lack of clear measures of the quality of teacher's work, then Katarzyna Schier points to the effect of parentification,

²⁹ See J. Żarczyńska-Hyla, B. Zdaniuk, J. Piechnik-Borusowska, E. Karcz-Taranowicz, B. Kromolicka, "Uwarunkowania parentyfikacji doświadczanej w dzieciństwie i okresie dorastania z perspektywy młodych dorosłych", op. cit., p. 212-213.

³⁰ See B. Chojnacka, *Doświadczenia parentyfikacji w perspektywie biograficznej*, Kraków 2021.

which manifests itself in adulthood as relative submissiveness in work relations at school and interpersonal relations with colleagues. The source of such behaviour lies in childhood and consists in internalizing the needs of the parentifying parent, which are considered an 'alien' part of the adult personality. The author concludes, based on her experience working with patients, that in childhood they experienced their parents' approval of certain attitudes and inhibition or exclusion of others. The external façade of a strong relationship of dependence on others can then be formed³¹.

The ambiguous definition of success inherent in the ambiguity of a teacher's professional role can make people with traumatic experiences of parentification (for example, ACA³²) susceptible to such disturbances as: a tendency to persistent and psychologically burdensome seeking of approval, readiness for maximum loyalty, even towards people who do not deserve it, or an extreme tendency to take excessive responsibility³³. As Krzysztof Konarzewski claims:

a teacher craving for knowledge about his own value finds it in the eyes of his headmaster, parents of his students, and finally the students themselves. This criterion condemns her/him to seek the respect of others, and thus makes him/her their client, and at the same time a competitor to his/her colleagues³⁴.

In another dimension, this ambiguity is associated with an excessive experience of discord between the theory and practice of education and an ambivalent attitude towards knowledge and scientific authorities, which in turn can lead to strong frustration.

PARENTIFICATION AND THE INTERNAL INCONSISTENCY OF THE TEACHER'S PROFESSIONAL ROLE

Coping with internal role inconsistency can be very difficult for people with parenting experiences because of the emotion regulation disorders

³¹ See K. Schier, *Dorośle dzieci*, op. cit., p. 67

³² ACA is a term used in addiction therapy to describe a person who grew up in a family with an alcohol problem as a child.

³³ See A. Klodecki, "Funkcjonowanie rodziny z problemem alkoholowym", [in:] *Rodzice i dzieci. Psychologiczny obraz sytuacji problemowych*, ed. E. Milewska, A. Szymanowska, Warszawa 2000, p. 183.

³⁴ K. Konarzewski, "Nauczyciel", op. cit., p. 154.

they often suffer from. This includes, for example, alexithymia, known as emotional blindness or emotional illiteracy³⁵. Research indicates that alexithymics are often unaware of their feelings, are unable to distinguish and describe emotions, and their verbal and non-verbal expression of emotions is disturbed³⁶. Thus, the above-described disturbance of emotion regulation may be of paramount importance when confronted with the conflicting demands of the role, for example, the student's signaled need to support his or her individual development, and the school's order to reproduce the social system, often contradictory to the individuality. This emotional blindness may have a destructive influence on the most important, from the pedagogical point of view, personal relationship between a teacher and a pupil and direct the teacher's activity mainly to the implementation of ideological guidelines or following the curriculum³⁷.

PARENTIFICATION AND THE PSYCHOLOGICAL DIFFICULTY OF THE TEACHER'S PROFESSIONAL ROLE

With regard to the psychological difficulty inherent in the professional role of a teacher, it is worth adopting the position of Lisa M. Hooper, according to whom destructive parentification should be classified as a traumatic experience that leads to long-term psychological and somatic changes of a person. Also, the results of research indicating that the experience of parenting trauma paves the way for increased reactivity to subsequent traumatic events in adulthood, for example in professional life, should be taken into account³⁸.

The specificity of professions involving the personal use of one's own individuality to help others, allows us to assume, following Antonietta DiCaccavo, that also teachers with the experience of parentification may decide to choose the profession due to an unconscious "desire

³⁵ See E. Młodziak, K. Schier, "Aleksytymia, ciało, psychoterapia – nowa perspektywa badawcza i kliniczna", *Psychoterapia* 2012, vol. 161, p. 29-40, after: K. Schier, *Dorośle dzieci*, op. cit., p. 109-110.

³⁶ See G. J. Taylor, R. M. Bagby, J. D. A. Parker, *Disorders of Affect Regulation. Alexthymia in Medical and Psychiatric Illnes*, Cambridge 1997; R. Pally, "Emotional Processing. The Mind-Body Connection", *International Journal of Psycho-Analysis* 1998, vol. 79, after: K. Schier, *Dorośle dzieci*, op. cit., p. 110.

³⁷ See K. Konarzewski, "Nauczyciel", op. cit., p. 165-172.

³⁸ Such research is invoked in: K. Schier, *Dorośle dzieci*, op. cit., p. 59.

to work through scars and disappointments of their own childhood”, expecting recognition and approval from students and colleagues, which they often did not receive in their families of origin. Then, by becoming emotionally involved with other teachers, students, and their parents, they expose themselves to excessive stress on the one hand, while on the other, they may distance themselves and maintain control³⁹.

PARENTIFICATION AND THE INCOMPATIBILITY OF THE TEACHER'S PROFESSIONAL ROLE WITH OTHER SOCIAL ROLES

In addition to the professional role, a teacher performs an array of other roles such as: a child of his or her parents; a student if he or she is completing his or her education; a spouse, a parent if he or she has a family of his or her own; a citizen, etc. According to Konarzewski, if the teacher's professional role interferes to a sufficiently serious degree with his/her other duties, which he/she cannot neglect, then this role can be neglected⁴⁰. The experience of parentification may interfere with the updating of the hierarchy of roles depending on circumstances or flexibility in their implementation, as exemplified by submissiveness to the official ideological position formulated by school authorities, divergent from one's own beliefs, and personal civic awareness of a democratic nature. It may serve to maintain a relative status quo, as a disciplined employee, but result in a frustrating abandonment of one's beliefs.

Given the variety of roles assumed, destructive parenting in a feminized teaching environment can sometimes be linked to the phenomenon known as the *Impostor Phenomenon*⁴¹. Clinical analyses revealed that women who were actively able to demonstrate significant achievements were unable to internalize them. They attributed the occurrence of these achievements to various external factors: luck, chance, personal charm, good social contacts, and hard work. In doing so, they devalued their own skills, intelligence, and personal values.

³⁹ See A. DiCaccavo, “Working with Parentification. Implications for Clients and Counselling Psychologist”, *Psychology and Psychotherapy. Theory, Research and Practice* 2006, vol. 79, p. 470, after: K. Schier, *Dorośle dzieci*, op. cit., p. 273.

⁴⁰ See K. Konarzewski, “Nauczyciel”, op. cit., p. 177.

⁴¹ See J. Langford, P. R. Clance, “The Impostor Phenomenon: Recent Research Findings Regarding Dynamics, Personality and Family Patterns and Their Implications for Treatment”, *Psychotherapy. Theory, Research, Practice, Training* 1993, vol. 30, p. 495–501; also: K. Schier, *Dorośle dzieci*, op. cit., p. 34–35.

SUMMARY

Summing up the considerations presented in this article, it is worth emphasizing that the reversal of roles between adults and children, which originates in the family, makes school an environment in which both parentified pupils and teachers can meet. Both groups need competent support, so sometimes professional help of a psychotherapeutic nature seems necessary. If researchers draw attention to the relationship between relational trauma resulting from parentification, and the nature of professional work related to the broader concept of helping, it should be made clear that the issue of parentification should become a subject of teacher education, as well as support in the process of practicing the profession.

While emphasizing the importance of the above strategy of psychotherapeutic support for adults who have experienced parentification in their family of origin, we cannot ignore the suggestion of prevention aimed also at parents and children. Katarzyna Schier emphasizes that these actions should be directed not only to people from risk groups, but also to the general public, because contemporary socio-cultural reality fosters the reversal of roles in the family⁴².

Although the educational system has not yet devised ways of recognizing the manifestations and consequences of role reversal, it seems necessary to develop professionally conducted psychoeducation with the use of workshop methods, mentalization, drama, computer programs, educational films, and special publications. It is also worth mentioning that teachers who are aware of the experience of parentification in their family of origin may decide to include psychotherapy in their personal and professional development.

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⁴² See K. Schier, *Dorośle dzieci*, op. cit., p. 277-279.

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CHILDREN'S EVERYDAY CREATIVITY AT SCHOOL AS AN INSPIRATION FOR ACTION RESEARCH ON EDUCATION OF PEDAGOGY STUDENTS¹

ABSTRACT:

The study is a presentation of the author's research project. It concerns a critical analysis of the everyday school life of a child at a younger school age and of pedagogy students as candidates for primary education teachers, in the context of shaping their creative skills. The analysis revealed the shortcomings of the Polish education system and its ineffectiveness in the area of shaping the creative skills of pupils and students. This gloomy diagnosis prompted the author to undertake qualitative research based on the action research method. The entire research process was carried out in accordance with the theoretical, practical and social research objectives formulated (before and during the research). The main goal of the research was to develop the professional skills of pedagogy students through the practical implementation of 30-hour classes in creative thinking and action training and to examine the relationship between participation in training and acquiring professional skills. The results of the

¹ Originally published: Iwona Paszenda, "Szkolna codzienność twórcza dziecka inspiracją badania w działaniu w edukacji studentów pedagogiki", [in:] *Dziecko i dzieciństwo w badaniach pedagogicznych*, ed. M. Magda-Adamowicz, E. Kowalska, Wydawnictwo Adam Marszałek, Toruń 2020, p. 295-313.

research showed that the mastery of creative skills by future educators may be the basic factor of their professional success.

KEYWORDS:

everyday school life, creativity, action research, professional preparation, teacher training

INTRODUCTION – INHIBITORS OF CREATIVITY IN THE SCHOOL EVERYDAY LIFE OF PUPILS AND STUDENTS

Everydayness forms the unique life-world of each person; it is always a particular individual's, but what it consists of is always social and cultural. "Everydayness is here and now. It is happening in the world of life, in the place of communicative action (in Jürgen Habermas's terms)², where in a specific time-space there are active subjects that interact socially and where they perform all kinds of *praxis*"³. Everydayness can therefore be understood as a "*habitus* made up of ways of thinking, feeling and acting observed in the form of social practice"⁴. In relation to lifelong processes, the term 'everydayness' is quite capacious. Nevertheless, it is possible to express by it some features which allow us to speak about everyday, ordinary, common life⁵.

In contemporary science, everydayness is an interdisciplinary category. For example, it is described by sociologists as "a new window through which to look at old problems and see something more"⁶. This

² The communicative action here is "action oriented towards intersubjective agreement, mutual understanding and unforced consensus about what to do. It is the kind of communication that occurs when people turn aside from strategic action (getting something done) to ask 'what are we doing?'" (S. Kemmis, "Critical Theory and Participatory Action Research", [in:] *The SAGE Handbook of Action Research. Participative Inquiry and Practice*, ed. P. Reason, H. Bradbury, Los Angeles, Singapore 2008, p. 127).

³ M. Dudzikowa, M. Czerepaniak-Walczak, "Codziennosc w szkole. Szkoła w codzienności", [in:] *Wychowanie. Pojęcia. Procesy. Konteksty*, vol. 5, ed. M. Dudzikowa, M. Czerepaniak-Walczak, Gdańsk 2010, p. 10.

⁴ E. Hałas, "Powrót do codzienności? Szkic problematyki socjologii życia codziennego", [in:] *Barwy codzienności. Analiza socjologiczna*, ed. M. Bogunia-Borowska, Warszawa 2009, p. 57.

⁵ See K. Ferenz, "Edukacyjne dylematy codzienności", [in:] *Kultura i edukacja (konteksty i kontrowersje)*, ed. W. Jakubowski, Kraków 2008, p. 13.

⁶ See *Socjologia codzienności*, ed. P. Sztompka, M. Bogunia-Borowska, Kraków 2008, cover.

‘window’ can also serve social psychologists, cultural anthropologists, representatives of family sciences, researchers of social work problems and educators. The everyday, seen through the eyes of a teacher, brings the image of contemporary education closer. Concentration of educators on everyday life increases the possibility of crossing borders, eliminating differences between disciplines or research areas⁷. It also creates a chance for opening up pedagogy to other disciplines, their cooperation and convergence. Therefore, as Mirosław J. Szymański implies, “it is worth looking at everyday life even more often than before, finding in it what eludes our attention, discovering unknown faces, learning new senses and meanings”⁸, and change what it has been criticised for.

This observation inspired me to embark on a research study that critically examines the school everyday life of the younger school-age children and pedagogy students, as candidates for their teachers, in terms of forming their creative skills⁹. Why am I focusing on these two levels of education? First and foremost because, as early childhood education research specialists have argued, “limiting research reflection to only the higher levels of education runs the risk of distortion and artifactual manipulation, since a student in the older grades is not a student ‘in general’, but one who has already been singularly shaped by previous school experiences”¹⁰. In addition, the first years at school indisputably determine who the child becomes and reinforce the child’s habits of thinking and understanding. They become the source of later difficult changes in knowledge structures, intellectual strategies, motives for cognitive action and capacity for reflection¹¹. The person of the teacher plays a significant role in this process. It will depend on his/her level of

⁷ See E. Bochno, I. Nowosad, M. J. Szymański, “Wprowadzenie”, [in:] *Codziennosc szkoły. Uczeń*, ed. E. Bochno, I. Nowosad, M. J. Szymański, Kraków 2014, p. 9.

⁸ M. J. Szymański, “Problematyka codzienności w badaniach społecznych i pedagogicznych”, [in:] *Codziennosc szkoły. Uczeń*, ed. E. Bochno, I. Nowosad, M. J. Szymański, Kraków 2014, p. 24.

⁹ Attempting to present the multi-faceted, intricate phenomenon of the formation of creative skills, or lack thereof, both among students of younger school age and students of pedagogy as candidates for their teachers, exceeds the scope of this article. Therefore, I will only refer to the description of research using the active method – action research, to which I involved early school education students.

¹⁰ D. Klus-Stańska, M. Nowicka, *Sensy i bezsensy edukacji wczesnoszkolnej*, Gdańsk 2014, p. 10.

¹¹ See *ibidem*, p. 8–9.

creative skills whether in the future he/she will have sufficient competences to unlock the creativity of his/her students. Hence, it is so important to analyse and evaluate the formation of creative capacities not only in the environment of students, but also in the environment of future educators.

The analysis of the relevant literature indicates that the school reforms introduced from time to time were supposed to revolutionise the school, which turned against the students¹². Researchers of everyday life in early childhood education prove that the teacher is the most active person in the classroom. It is the teacher who is most often heard speaking, explaining and demonstrating. On the other hand, pupils sitting at their desks listen, repeat, follow instructions, transcribe from the board, fill in the empty boxes in their exercise books, which may be treated as the logo of early childhood education. Moreover, the youngest pupils do not ask questions, do not develop their own ideas and strategies, do not cooperate in teams, except for a few 'festive' occasions, do not experience independence. In everyday school life, they

enclose their world in a circle of windows, gaps in sentences, puzzles and pictures to colour and count. They prepare for further stages of education, whose developmental goals have shifted to selection and segregation, and testing has reached its apogee. This is the school that ever younger children enter due to school reform¹³.

Such a school model based on the managerial role of the teacher, who relieves the students of both the formulation of problems and the search for their solutions, has little in common with a climate conducive to the emergence and development of creativity. It makes "deep layers of creativity hidden under a thick layer of ignorance"¹⁴. These conclusions are consistent with the observations made by the creativity educator Krzysztof J. Szmidt. The researcher draws attention to the ubiquitous 'key-based' assessment and 'test-based' learning. As a result, secondary

¹² See D. Klus-Stańska, M. Nowicka, "Wstęp do wydania nowego uzupełnionego", [in:] D. Klus-Stańska, M. Nowicka, *Sensy i bezsensy edukacji wczesnoszkolnej*, op. cit., p. 13.

¹³ Ibidem, p. 14.

¹⁴ T. Ziewiec, "Stymulacja kreatywności w nauczaniu", [in:] *Innowacyjność, kreatywność a rozwój*, ed. J. Kleer, A. P. Wierzbicki, Warszawa 2012, p. 34.

school students often astonish their university lecturers with ignorance of the rudiments of humanistic knowledge. This way of evaluation and learning, he stresses, both fails to appreciate and inhibits the manifestation of independence and originality of students' thinking, increases their cultural illiteracy and encourages cognitive conformity and mediocrity¹⁵.

The examples mentioned above reveal that the Polish school is invariably a place where social hopes and social criticism intersect. On the one hand, it is the only tool available to society for maintaining social order, transmission of cultural heritage, building cultural identity, preparation for the labour market and efficient functioning in the knowledge society. On the other hand, it is criticised for its educational and upbringing inefficiency, inhibiting intellectual initiative or even blocking the development of pupils' thinking¹⁶.

Currently, despite the fact that the basic tasks of a teacher include stimulating and initiating activities conducive to the development of creativity, the realisation of these assumptions remains a mere postulate. The review of research concerning various aspects of developing creativity in the course of formal education shows that teachers are aware of the importance of creativity and generally believe that the school should create conditions for its development. Unfortunately, few of the teachers surveyed feel responsible for initiating such activities. Teachers lack knowledge on creativity, are unable to adequately define the profile of a creative pupil, have problems diagnosing creative abilities and talents, and have insufficient competence to foster creativity in their pupils¹⁷. Dorota Klus-Stańska highlights that "uncreative teachers are not merely unable to trigger students' creativity; they do not understand creativity and do not know how to react to it. They feel anxious, helpless and in extreme cases hostile towards it"¹⁸. These findings are consistent with the results of other studies on the creative competence of early childhood education teachers¹⁹.

¹⁵ See K. J. Szmidt, *Edukacyjne uwarunkowania rozwoju kreatywności*, Łódź 2017, p. 32–33.

¹⁶ See D. Klus-Stańska, "Dokąd zmierza polska szkoła? Pytania o ślepe uliczki, kierunki, konteksty", [in:] *Dokąd zmierza polska szkoła?*, ed. D. Klus-Stańska, Warszawa 2008, p. 7–9.

¹⁷ See J. Gralewski, "Kreatywny uczeń w oczach nauczyciela. Kilka słów o tym, czy nauczyciele trafnie rozpoznają twórczy potencjał swoich uczniów", [in:] *Wychowanie we współczesnej szkole*, ed. R. Kowalski, O. Szykarczyk, Siedlce 2014, p. 66–96.

¹⁸ D. Klus-Stańska, "Dokąd zmierza polska szkoła?", op. cit., p. 62.

¹⁹ See *Kompetencje kreatywne nauczyciela wczesnej edukacji*, ed. I. Adamek, J. Bałachowicz, Kraków 2013.

Possibly, it so happens since despite much innovation and curricula changes, the qualitative progress in pedagogical universities continues to be unsatisfactory. It is marked by excessive reliance on tradition, routine and inadequate critical thinking and concern for professional development and practical training²⁰. Many schools lack activities that would enable future educators to look creatively at their own professional and social role already during their studies, while preparing for exercise of this role²¹. In some universities neither the education process nor the process of implementing a professional role contributes to the development of students' creative capacities²². This is due to the fact that the list of subjects being the module of curricula standards for pedagogy does not include creative education²³.

This cultural inadequacy of the school and the related helplessness of teachers, turns the Polish outdated school which is unable to change and unaware of its own role and mechanisms of action into a non-creative environment which does not foster creativity²⁴. Besides, "school classes are so much about forcing students to regurgitate that talk of stimulating creative behaviour in the classroom seems an extreme naivety, a pedagogical hypocrisy or even a grim joke"²⁵. Probably for this reason so much is written and said about modern school being a school of appearances²⁶, which enlarges the gap between the expected teaching outcomes and their implementation in educational practice. Traditional schooling is often criticised for its uniformity and for its one-size-fits-all approach. If there are proposals for alternative solutions, they

²⁰ See Cz. Banach, "Ewolucja funkcji i kompetencji zawodowych nauczyciela", [in:] *Pedagogiczno-psychologiczne kształcenie nauczycieli*, ed. E. Salata, Radom-Warszawa 2005, p. 24.

²¹ See A. Cudowska, *Kształtowanie twórczych orientacji życiowych w procesie edukacji*, Białystok 2004, p. 159.

²² See J. Uszyńska, "Postawa twórcza jako składnik kompetencji osobowościowych nauczycieli przedszkoli i kandydatów na nauczyciela", [in:] *Edukacja alternatywna. Nowe teorie, modele badań i reformy*, ed. J. Piekarski, B. Śliwowski, Kraków 2000, p. 338.

²³ See D. Ekiert-Oldroyd, "Pedeutologiczne konteksty dydaktyki twórczości i ich pragmatyczne implikacje (pedeutologia twórczości i dydaktyka twórczości)", [in:] *Dydaktyka twórczości. Koncepcje – Problemy – Rozwiązania*, ed. K. J. Szmidt, Kraków 2003, p. 138.

²⁴ See D. Klus-Stańska, "Dokąd zmierza polska szkoła?", op. cit., p. 9.

²⁵ D. Klus-Stańska, "Obszary zgody na twórczość dziecięcą we wczesnej edukacji", [in:] *Gdyby Einstein chodził współcześnie do szkoły... Dziecko i twórczość w pedagogice wczesnoszkolnej*, ed. E. Szatan, D. Bronk, Gdańsk 2008, p. 59.

²⁶ See *Sprawcy i/lub ofiary działań pozornych edukacji szkolnej*, ed. M. Dudzikowa, K. Knaśnicka-Falbińska, Kraków 2013.

are only a trace 'islands of educational resistance'²⁷. Although they are still a margin of public life of education, concepts are increasingly seen to disseminate innovative educational initiatives, thanks to which it will be possible to radically change the paradigms of the current traditional school. Contemporary reality has radically changed the way of thinking about education. Today there is a huge demand for creative people, who can flexibly adapt to the changes of everyday life. If pupils/students completing their education are not in the habit of being creative, they will probably not establish it in everyday life. However, this behaviour will be indispensable to them. It is therefore regrettable that they will not acquire it during the 5-7,000 hours spent on average at school.

This gloomy diagnosis that reveals deficiencies of the Polish educational system and its incompetence in the area of forming creative skills of pupils and students led me to undertake research based on the method of research in action. My primary goal was to try to improve existing practices in the education of prospective educators.

INVESTIGATING EVERYDAY LIFE AS A 'JOURNEY' – RESEARCH IN ACTION IN THE EDUCATION OF TEACHER CANDIDATES FOR GRADES 1-3

Research of everyday social life can be compared to and the described via the travelling metaphor. In this sense cognition, understood as a theorising process "can be seen as a *never-ending journey*, as a kind of *moving forward*". A journey seems here more as a way of "being in the world" than moving between two fixed points²⁸. The research process takes the form of a journey in which the subject 'guides' the researcher through

²⁷ See B. Śliwerski, *Wyspy oporu edukacyjnego*, Kraków 2008; M. Hawranek, *Szkoły, do których chce się chodzić są bliżej niż myślisz*, Kraków 2021; M. Budajczak, *Edukacja domowa*, Gdańsk 2004; *Polska szkoła uznana za najlepszą na świecie. Znajduje się w Konstancinie-Jeziornej*, Wiadomości (onet.pl), <https://wiadomosci.onet.pl/kraj/polska-szkola-uznana-za-najlepsza-na-swiecie-znajduje-sie-w-konstancinie-jeziornej/3rsyd7j>, access: 22.07.2022.

²⁸ Z. Melosik, "Teoria i społeczne konstruowanie rzeczywistości", [in:] *Normatywizm – etyczność – zaangażowanie. Współczesne dyskusje o praktyczności pedagogiki*, ed. M. Nowak-Dziemianowicz, E. Kurantowicz, *Teraźniejszość – Człowiek – Edukacja* 2001, special issue, p. 161.

their life or a part of it, spins a story, reflects on an issue, expresses an opinion. The researcher “wanders along with the local inhabitants, asks questions that lead the subjects to tell their own stories of their world, and converses with them in the original Latin meaning of *conversation* as ‘wandering together with’”²⁹. In this context, the research situation resembles a journey in which the researcher, visiting countries and exploring many regions, follows a path leading to a story which they will tell on their return home³⁰. The activities experienced during this ‘journey’ are coordinated by a specific research model, which can be metaphorically described as a GPS (Global Positioning System). Its task is to determine the subsequent stages of research. The study is contingent on a particular philosophy, a methodological tradition which the researcher uses. The adopted ideology constitutes the original perspective of experiencing the research reality, especially in the context of relations with the research subjects and oneself in the capacity of a researcher.

In empirical research in pedagogy newer and newer ‘maps’ of positions, methodological approaches are being created, which enable effective access to interesting social phenomena and problems³¹. Of crucial importance in this multi-paradigmatic way of research is a comprehensive and critical perception of the ‘methodology map’³². Therefore, research practice should play the role of reflective practice, involving conscious and critical reflection on the individual trajectory of the research conducted. These conditions are fulfilled by the study method referred to in Poland as research in action. It is based “essentially on the synergy of understanding cognition and constructive change. Thus, it is a particular expression of epistemology, methodology and praxiology of practically oriented social science”³³. It can be applied when we recognise a crisis situation in a particular institution, environment or social group³⁴.

²⁹ S. Kvale, *InterViews. An Introduction to Qualitative Research Interviewing*, Thousand Oaks, New Delhi 1996, p. 4.

³⁰ See *ibidem*, p. 4–5.

³¹ See *ibidem*, p. 12–13.

³² See *ibidem*.

³³ D. Kubinowski, *Idiomatyczność – synergia – emergencja. Rozwój badań jakościowych w pedagogice polskiej na przełomie XX i XXI wieku*, Lublin 2013, p. 171.

³⁴ See *ibidem*, p. 171.

At this point, it should be added that any scientific research understood as a set of synchronised activities that offer new knowledge³⁵ makes sense provided its outcomes may contribute to humans' deliberate actions in their life-worlds³⁶. Therefore, one can only speak of the usefulness of research work when "one's own everyday experiences are confronted with rational knowledge on the one hand, and with scientific hypotheses on the other, and make it possible to verify them and improve one's own practice"³⁷.

Specific opportunities in this area are offered by action research. This procedure of cognition and change promotes the integration of thinking and acting, reflection on and in action and the improvement of professionalism. The researchers involved ask themselves questions about "the effectiveness of their own practice, observe their own actions, give them specific meanings, come to their own conclusions, which are transformed into sources of initiatives. As a result, further questions and ideas for action are generated"³⁸. Such a perspective reveals that "action research consists in the real empowerment of the process of cognition and change"³⁹. This procedure ensures that practitioners participate in discovering and explaining the mechanisms that govern their practice, rather than simply makes them users of discoveries. Metaphorically, it can be said that action research "enables you to smell the flowers with your nose rather than with your imagination"⁴⁰. This is because the researcher has the opportunity to scientifically explore the space in which he/she performs his/her professional role.

THE PRACTICE OF ACTION RESEARCH

I adopted such a position in my own research, whose detailed procedure I will describe later on. At this point, I will mention that the context of the

³⁵ See K. Konarzewski, *Jak uprawiać badania oświatowe. Metodologia praktyczna*, Warszawa 2000, p. 14.

³⁶ See M. Czerepaniak-Walczak, "Badanie w działaniu", [in:] *Podstawy metodologii badań w pedagogice*, ed. S. Palka, Gdańsk 2010, p. 319.

³⁷ Ibidem, p. 320.

³⁸ Ibidem, p. 320–321.

³⁹ Ibidem, p. 322.

⁴⁰ Ibidem.

research was set in the environment of one of the higher education institutions in Lower Silesia which educates pedagogy students. The source of inspiration for the research was the criticism of the contemporary education system dominating both in literature and in everyday life. Traditional education is not infrequently accused of more or less justified misconduct. The most important of these transgressions include the transmission character of teaching, the continuous domination of encyclopaedic education and administration methods, as well as the emphasis on convergent⁴¹ and non-creative thinking, which inhibits cognitive curiosity, inquisitiveness and questioning⁴². Furthermore, this “creative university tendency does not produce adequate changes in the selection of teaching content and methodologies and is often limited to a make-believe modification of teaching objectives to correspond to so-called challenges of the present day”⁴³.

This assumption was confirmed in my interviews with pedagogy students. On their basis I formulated the hypothesis that in the course of their education, next to the activities conducive to the formation of professional skills, there are also those of a reproductive character (papers, work with text). As a consequence, creative thinking and creative activities do not find an appropriate place in the education of future educators. With these conclusions in mind, I attempted to develop my own project aimed at improving existing practices. A tangible result of this undertaking was my offer to the students of pedagogy to participate in optional creativity trainings. In my own research I use the term ‘training’, following Edward Nęcka and his associates, in a narrow and specific sense: “creativity training is a system of exercises used on an ad hoc basis to increase the creative potential of an individual or groups of people”⁴⁴. The term ‘creativity training’ may raise some people’s doubts. For example, the question may arise as to whether such training is really creativity training, since there are established norms and rules,

41 Convergent thinking is a thought process that assumes multiple points of view and embraces the many possibilities of a problem, without concern for the ‘correct’ answer or logical arrangement.

42 See K. J. Szmidt, “Szkola przeciwko myśleniu pytajnemu uczniów. Próba określenia problemu, sugestie, rozwiązania”, *Teraźniejszość – Człowiek – Edukacja* 2003, no. 2.

43 K. J. Szmidt, *Edukacyjne uwarunkowania rozwoju kreatywności*, op. cit., p. 66.

44 E. Nęcka, J. Orzechowski, A. Słabosz, B. Szymura, *Trening twórczości*, Gdańsk 2005, p. 12.

only that they are different from the traditional ones? Researchers have argued that this kind of training is not about stripping creativity of its specificity, but about de-mythologising it⁴⁵.

This means that we need to move away from conceiving of creativity as something extraordinary, almost supernatural. If someone believes that the term 'creativity training' is a profanation of the word 'creativity' - he may use the phrase 'ingenuity training' instead. The sense of exercise will not change because of this. What is important is their relevance to the average person, especially children, schoolchildren and students who expect more ingenuity, originality of thought and everything that is associated with creativity with a small 't'⁴⁶. When putting together my training programme I assumed that such training modalities could eliminate most of the objections to education described above. The methods of teaching creativity proposed during the trainings refer to principles and norms of pedagogical conduct different from those accepted by traditional education. The aim is not to memorise as many facts as possible, but for help for students of pedagogy - shaped adults, with already defined creative potential, sometimes full of inhibitions and blockades, in becoming more creative.

RESEARCH OBJECTIVES AND PARADIGM

The main research objective was to develop professional skills of pedagogy students through practical implementation of 30-hour classes of creative thinking and acting training and to investigate the relationship between participation in creativity training and acquisition of professional skills. The choice of the research topic was determined by my personal experience as a participant of creativity training, gained during a year-long internship at the School of Trainers and Psychotherapists at the Gestalt Therapy Institute in Krakow, as well as the experience of an academic teacher using the strategy of creativity training methods in teaching students. However, it was cognitive curiosity that was the main reason for embarking on the study. I was

⁴⁵ Ibidem, p. 9.

⁴⁶ Ibidem, p. 12.

interested in whether there was a correlation between participation in activities aimed at developing creative skills and the acquisition of professional skills by future educators. I decided that the model of action research would be the most appropriate for the analysis of the research problem raised. In its assumptions, it is part of the critical paradigm, which emphasizes the social function of science and its social importance, is focused on action and the study of this action⁴⁷.

The research met the demands of the methodological tradition of the critical paradigm. Set in the everyday educational reality of a higher education institution, it aimed to make the participating subjects aware of the contradictions implicit in the existing and upheld social order. Critical reflection and self-reflection as a factor and outcome of the dialectical relationship between the participants in the research situation and the other elements that make up the lifeworld of the subjects involved in the research became crucial. In other words, the aim was to make the subjects aware of the consequences of participating in an educational process that is often not conducive to the formation of their creative skills and, indirectly, to the formation of professional skills. The emancipatory function of the research was manifested, among other things, in the fact that one of the research assumptions was to change the situation of the subjects in three terms: 1) the research subjects ceased to be mere objects studied (and then transformed) and became rather conscious participants in research situations; 2) through participation in the research process, their self-awareness and potential for self-development rose; 3) they acquired the ability to “speak with their own voice”, i.e. had a chance to air their opinions on matters of importance to them⁴⁸. Individual and group interviews and continuous feedback sessions served this purpose. Under these conditions, the role of team learning increased, the boundary between the researcher and the subjects became blurred and the latter became actively involved in the research process.

⁴⁷ S. Nowak, *Metodologia badań społecznych*, Warszawa 2007; S. Kemmis, “Critical Theory and Participatory Action Research”, op. cit.

⁴⁸ M. Czerepaniak-Walczak, “Badanie w działaniu – perspektywa akademicka”, [in:] *Problemy współczesnej metodologii*, ed. J. Krajewski, T. Lewowicki, J. Nikitorowicz, Olecko 2001, p. 188.

RESEARCH TYPES

I decided on qualitative studies⁴⁹. The choice of the qualitative research strategy was due to the fact that creativity tests do not examine creativity itself but rather its components, factors or only potentialities⁵⁰. Therefore, nothing prevents the use of case studies, product analysis or focus groups with some of the former participants of the trainings, if only to make them aware of the relevance and effects of creativity training⁵¹. Essential was also my conviction that a qualitative approach makes it possible to take into account the uniqueness of individual experiences. It provides a flexible and in-depth exploration of these experiences and therefore allows for an insightful response to the research questions posed. Moreover, this approach respects human dignity. It is expressed in the subjective treatment of the subjects. Unlike the quantitative approach, it does not reduce the richness of experience to numbers or the humanity of the subjects and the researcher to the object and tools of research. For these substantive and ethical reasons I decided to choose a qualitative research approach.

As I have already mentioned, a distinctive feature of the qualitative (humanistic) treatment of empirical research is the striving for the empowerment of the research relationship. In this orientation it is therefore possible to conceive of the role of the researcher in such a way that emphasis is placed on his/her similarity to the researched subject. Both subjects have certain features in common and participate within a 'shared' reality.

Putting the word 'shared' in inverted commas indicates that this is never a complete sameness of situation for each party, but it does offer the possibility of trying to bring them together. Their 'shared' world is created as a result of equalizing mechanisms, namely: the researcher loses the positivistic, privileged position of the observer from above

⁴⁹ See M. Magda-Adamowicz, I. Paszenda, *Treningi twórczości a umiejętności zawodowe*, Toruń 2011.

⁵⁰ See K. J. Szmidt, "Czy twórczość można mierzyć? Spory wokół psychometrycznych metod badania twórczości", [in:] *Twórczość – wyzwanie XXI wieku*, ed. E. Dombrowska, A. Niedźwiecka, Kraków 2003, p. 53.

⁵¹ See M. Karwowski, "Trening twórczości: rozpoznanie, planowanie, monitorowanie, przewodzenie", [in:] *Trening twórczości w szkole wyższej*, ed. K. J. Szmidt, Łódź 2005, p. 52.

and in a way descends to the level of reality, when at the same time the position of the partners in the research situation is raised. This happens as a result of taking into account the subjective competences of the research subjects. Thanks to this, the investigator can acquire from them knowledge about the 'shared' reality. This situation allows him to form a partnership relation, in which he no longer plays the role of an authority. This, in turn, helps him to reduce spontaneously emerging status differences⁵². In a partner-like dialogue and through the negotiation of common findings, both the researcher and the subjects are empowered and autonomous⁵³. Together they decide on the accuracy of the research. In this way they gain more awareness, the possibility to reflect on their actions and a chance for self-development and emancipation⁵⁴.

In my research I have tried to pay particular attention to the issues highlighted. Therefore, I set the context of the research in the environment of a higher education institution, where I played the role of an academic. This allowed me to capture the subjects' experiences in a direct way. In order to check whether the image of the research reality I presented represented its true nature and character, I referred, during the interviews, to the knowledge and reflections of the subjects, who considered the adequacy of the interpretation of the research reality presented by me. Such a procedure allowed me to assume the role of a researcher who can learn from their knowledge of the 'shared' reality. With the above assumptions in mind, to investigate the relationship between participation in creativity training and the acquisition of professional skills by pedagogy students, I used a research procedure based on integrating the activities of the researcher and the subjects in a single research cycle.

The designed research model was built on a hermeneutic circle, which resembles a dialogue situation. Questions posed to the 'world' provided answers that triggered further questions. Moving along this track, I confronted my own interpretations with the explanations of the research participants. This gave me the chance to knowingly move outside my

⁵² See A. Wyka, "Model badania poprzez wspólne doświadczanie, czyli o pewnej wersji empirii 'jakościowej'", *Kultura i Społeczeństwo* 1985, vol. XXIX, no. 2, p. 97–98.

⁵³ See M. Malewski, "Metody ilościowe i jakościowe w badaniach nad edukacją. Spór o metodologiczną komplementarność", *Kultura i Edukacja* 1997, no. 1–2, p. 19.

⁵⁴ See *ibidem*, p. 20.

own horizon and to expand and complement it with elements found in the horizons of others⁵⁵. Together with my subjects I tried to understand the worlds of educational reality which had become the object of our interest and research. Placing subsequent stages of activities in a hermeneutic circle, and thus breaking with the linear structure of the study, enabled repetitiveness and reproducibility of the research cycle. This was facilitated by critical reflection, present at each stage of the research, and the process of generating questions and research problems. Assuming this structure of the research process, each reflection closing the research cycle triggered subsequent questions and problems, which defined a new course of research proceedings. Critical self-/reflection had a direct impact on each phase. The benefits of such a planned model of research not only created a chance for intentional change in selected areas of social reality, made the researched active subjects, but were also useful for me as an investigator. I was therefore able to learn more about my own teaching practice, and consequently to improve it.

At this point it is worth indicating one more feature of action research. Some call it the 'self-reflection spiral', others refer to it as the 'research cycle stages'. Whatever the name, however, in both cases there is a clear idea of a hermeneutical circle, in which one cycle, or an element of the spiral, becomes only a single step in cognition⁵⁶. The individual stages of the research cycle followed a multi-phase model of the action research procedure put forth by Stephen Kemmis⁵⁷.

PRACTICAL COURSE OF THE RESEARCH CYCLE STAGES

STAGE I – IDENTIFYING THE PROBLEM

The first research stage consisted in formulating research questions and collecting/constructing data to build information about the existing educational reality. I focused my research activities on the exploration of the following research problems:

⁵⁵ See M. Malewski, *Teorie andragogiczne. Metodologia teoretyczności dyscypliny naukowej*, Wrocław 1998.

⁵⁶ See T. Pilch, T. Bauman, *Zasady badań pedagogicznych. Strategie ilościowe i jakościowe*, ed. A. Radzko, Warszawa 2001 (chapter 6).

⁵⁷ See *ibidem*, p. 312–314.

1. What is the place of creative skills classes in the process of educating pedagogy students?
2. How are the classes addressed to the students of pedagogy conducted in the educational practice?
3. What are the students' opinions on their participation in the process of pedagogical education?

The aim of the questions formulated in this way was to gain knowledge about the functioning in the teaching practice of the postulates of inspiring and developing students' creative dispositions. The research was based on the qualitative interview technique.

STAGE II – UNCOVERING THE PROBLEM

The second stage of the study⁵⁸ consisted in deep reflection on the educational reality examined, its deficiencies and relevant reflections of the subjects. At this stage I was interested in the following:

1. What are the reasons for the sometimes unsatisfactory formation of creative skills of pedagogy students?
2. How can this situation be changed for the better?

In this phase of the research I used the focus group interview technique⁵⁹ and projection techniques: the unfinished sentence test and the animation and collage technique⁶⁰. The purpose was to find out independent opinions on the question to be discussed, excluding the possible influence of the group on these opinions, and at the same time to check the consistency (or lack thereof) in the opinions of all the participants. In addition, the techniques were to verify that the conclusions resulting from their analysis were consistent with the other data obtained during the individual interviews.

The conclusions from the discussion set the direction for further research measures.

STAGE III – DRAFTING THE MAIN ACTION PLAN

At this stage of the study my action focused on developing a project geared towards enhancing the existing practice. I drafted a scenario of

⁵⁸ See M. Magda-Adamowicz, I. Paszenda, *Treningi twórczości a umiejętności zawodowe*, op. cit.

⁵⁹ See D. Maison, *Zogniskowane wywiady grupowe. Jakościowa metoda badań marketingowych*, Warszawa 2001.

⁶⁰ See *ibidem*.

a 30-hour training in creative thinking and acting. I designed a training outline, the objectives of each training session, a description of the training process, and a list of exercise resources.

STAGE IV – IMPLEMENTING THE PLAN

In this part of the research, the planned project was put into practice. The aim of the research was to attempt to provide consolidated and verified knowledge about the actual course of creativity training and to fill the gap in existing knowledge with a new area of cognition. The research was based on the technique of participant observation. At this stage, I carried out continuous monitoring of the actions taken. This was done by means of continuous feedback sessions, during which the experiences were analysed and conclusions about the training were shared between the researcher and the participants.

STAGE V – EVALUATION/CHECKING UP ON THE RESULTS OF ACTION

The fifth phase of the research consisted of evaluating the effectiveness of the solutions used. The study focused on the following problems:

1. What are the effects of pedagogy students' participation in creativity training?
2. What are the individual ways in which the students experience creativity training?
3. What kind of creative skills did the students acquire participating in creativity training?
4. What kind of professional skills did the students acquire as a result of participation in creativity training?

The aim of the research was to find out whether there was a correlation between students' participation in creativity training and their acquisition of professional skills. It also attempted to address the paucity of relevant empirical research. In this phase I reused the technique of focus group interviews and projective techniques: the test of unfinished sentences and the animation technique.

At this stage I analysed and interpreted the practical course of the creativity training. First, I grouped the entries according to the areas and themes they referred to in their images. Not content with the external message of the image, I moved on to the next stage of analysis,

i.e. deconstruction and interpretation. In this way I reconstructed the course of the training, supplementing it with comments and feedback on the individual experiences of the trainees and my experience as a creativity coach.

STAGE VI – INTEGRATING THE KNOW-HOW ACQUIRED DURING THE STUDY WITH SCIENTIFIC KNOWLEDGE, THEORETICAL/ ANALYSIS AND INTERPRETATION OF THE MATERIAL COLLECTED

The sixth phase of the research consisted in integrating the knowledge/ insights gained during the research with scientific, theoretical knowledge. Based on the available literature I tried to relate the results of my own research to the results obtained by other researchers diagnosing the effectiveness of training interventions. This part of the research was also a phase of developing my own concepts of describing the analysis and interpretation of the collected research materials, based on existing knowledge on the subject. Bearing in mind the objectives, problems and research methods and techniques used, I referred to the qualitative analysis of the collected research material when analysing and interpreting the research results. In this type of research, a special role is played by the widest possible background of the researcher's analysis and interpretation, determined by the socio-cultural framework, the framework of social interaction, and that of the research process.

The context of my own research was determined by the academic environment, which I referred to while analysing and interpreting its results. The first research step was to analyse and interpret the experiences of those involved in the traditional educational process. For this purpose, I transcribed all the conversations recorded on a recorder. Then, I analysed the individual interview texts produced in the course of the transcription. Subsequently, within these individual cases, I made a structural description, analysing particular situations, climaxes, turning points, looking for regularities and contradictions within them. This resulted in student narrative maps that illustrated these experiences, both in individual terms and in terms shared by all participants. The former reflect the individual trajectories of the participants' narratives, while the latter illustrate the common motifs they share. Maps of these

narratives were constructed based on the statements undertaken by the participants in the study. The resulting individual narrative trajectory, despite sharing common areas of experience with other subjects, had its own specific direction and character. It was also characterised by its uniqueness, as in every context (social, physical, research, etc.) it can take a completely different course.

At this point I would like to make it clear that the identification of a common narrative map for the subjects was not intended to illustrate those areas of experience that are equally shared by all subjects. Due to the fact that each narrator referred to these areas in their own individual way, the resulting map was only a certain list of the main themes referred to by each of the subjects. Nevertheless, at this stage of analysis, by combining the experiences of subsequent narrators, I was able to go beyond the individual case, and thus enhance the perspective of learning about the research reality with new cognitive horizons. By juxtaposing, comparing and integrating individual narratives, I obtained a more detailed picture of the phenomena and problems I was interested in.

The next research step was the analysis and interpretation via projection techniques of the results gained. Here it was also important that the results should not be interpreted in isolation from the entire context of the study and other available data. Hence, during the analysis I examined whether the results obtained were consistent with other available data and could be explained by these data.

STAGE VII – REFLECTION ON THE STUDY SUBJECT

In the last phase, the knowledge gained in the course of the research was embedded in the context of existing knowledge and conclusions for educational practice were drawn from it. I also shared my own reflections on the subject of the research from the perspective of the role of a creativity coach.

STUDY CONCLUSIONS

To conclude these considerations, I would like to mention that, in accordance with the open-ended procedure of qualitative research, research objectives and questions were formulated not only in the initial phase

of the research, but also at each stage. As a result, the research was not limited only by the list of selected questions/problems, but also developed during the study. The process of data collection/construction consisted of my numerous activities as a researcher, during which I experienced the research reality and simultaneously collected/formulated data about it. The whole process was based on the research objectives of theoretical, practical and social nature, formulated before and during the activities.

The first aim was realised through theoretical systematisation of knowledge about potentials, scopes and areas of creativity training for students of pedagogy. Thanks to this, I have rationally developed a scientific theory as a basis for practical action. The second goal was achieved through the practical implementation of creativity trainings and generalizations gained from the results of my own research as well as learning about the relationship between participation in creativity trainings and the acquisition of professional skills by students of pedagogy. The third aim resulted from the civilisational and cultural challenges of the present time, which increasingly calls for people with a creative mindset⁶¹.

The activities and actions undertaken in the course of the research made it possible to draw the following conclusions: creativity trainings are important in the acquisition of professional skills by students of pedagogy. The collected research outcomes showed that the objectives of the interventions directed at the development of the creative skills of the trainees concern a wide spectrum of changes in their cognitive, emotional and social functioning. The respondents' statements showed that, on the one hand, the individual acquires habits and skills for creative problem solving, overcoming barriers to creative thinking and acting. On the other hand, they develop their communication, cooperation and autcreation skills, thanks to which they control themselves and their development. Mastering these skills in the course of educating educators can be a basic factor of professional success. Conclusions of practical nature suggest the necessity of designing and implementing educational programmes aimed at 'education towards creativity'.

⁶¹ See M. Magda-Adamowicz, I. Paszenda, *Treningi twórczości a umiejętności zawodowe*, op. cit.

In the context of disturbing reports about the negative influence of school on creative dispositions, it would be advisable to include in the educational programmes at least those elements that support the creative capacities of students of pedagogy. The realization of these postulates could level out the strengthening of adaptive forms of learning behaviour by traditional education. This issue is important because in a situation when continuous learning has become a necessity, and sometimes even a prerequisite for 'professional survival', there is a huge demand for the development of various types of skills, especially creative ones. These, in turn, are particularly desirable in the teaching profession. The interest of a well-understood education assigns them the roles of creative performers of creative activities. A creative approach at work and in pedagogical practice should, therefore, be shared by all those who engage in teaching, upbringing and care. For this reason, the key task of education is the increased care of educators for the promotion of creative thinking and acting of learners at all levels of education. The acquisition of similar skills by their students will depend on their own creative competence, reflexivity and critical skills. Hence the importance of analysis, shaping creative predispositions not only in the environment of students, but also among future teachers of grades 1 to 3. The first years of education (starting as early as kindergarten) determine the child's biography. Teachers educating the young generation play a vital role in the education process.

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PART II

RELIGION, PEDAGOGY AND PRACTICE OF LATE MODERNITY

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BRUNO LATOUR'S THEO-ECOLOGIES AND ECO-THEOLOGIES, OR ON THE PEDAGOGICAL POTENTIAL OF A HYBRID LANGUAGE AS AN INSPIRATION FOR A RELIGIOUS STUDIES PEDAGOGY OF RELIGION

ABSTRACT:

We live in an age of planetary instability. The climate crisis has effectively captured the public imagination. It seems that in the face of numerous environmental crises, even science and religion, despite all their irremediable differences and mutual biases, are sometimes able to think and act together. The interpenetration of these two distinct orders: 'knowledge' and 'faith' is a symptom of such a change. The example of Bruno Latour's ecotheological argument presented in this study is an interesting testimony to the hybridization of the language of science and the language of religion. Since Latour's 'negotiations' touch upon such unobvious interfaces as *scs* and humanities or science and religion, it is worthwhile for the pedagogy of religion to reach not only to theology, which is a constant point of reference for the traditional pedagogy of religion, but also to critical religious studies. Its theoretical potential could help integrate the topic of religion with new-materialist, post-secular, non-anthropocentric, post-humanist, and pro-ecological thought.

KEYWORDS:

Bruno Latour, Anthropocene, science, religion, hybridity, hybridization, pedagogy of religion

We live at a time of planetary instability¹. The climate crisis has effectively gripped the Western imagination and it is hard not to get the impression that in the face of challenges on this scale, all hands must be on deck! Discourses of disparate orders, conflicting ways of thinking, theories and ideologies are rapidly acquiring an equal status in the public space. It is as if the severity of the ecological *fin de siècle* and the gravity of the *earth's* situation began to effectively burst through the thick and baked armour of political indifference, which Robert Esposito defined as a liberal paradigm of immunizing the individual from communal negativity, when a systemically produced series of defence mechanisms relieves the individual from his communal obligations². It looks like the somewhat dusty utopia of global solidarity has been given a boost (is it not too late, though?). The agitation about the state of the world is spreading unexpectedly widely, not only in the sciences, but also in... religion. This fever reverberates in an interesting way in language: 'the apathy of the Anthropocene'³, 'the arrogance of the Anthropocene'⁴, 'the policy of nature'⁵, 'catastrophic climate change'⁶, 'climate wars'⁷ –

¹ E. Bińczyk, *Epoka człowieka. Retoryka i marazm antropocenu*, Warszawa 2018, p. 11.

² *Immunitas* "reconstructs their [individuals' – MH] identity by protecting them from a risky contiguity with the other, relieving them of every obligation toward the other and enclosing them once again in the shell of their own subjectivity" (R. Esposito, *Terms of the Political. Community, Immunity, Biopolitics*, transl. R. N. Welch, Fordham University Press New York 2013, p. 49). See also: M. Ratajczak, "Poza paradygmat immunizacji: biopolityka w projekcie filozoficznym Roberta Esposito", *Praktyka Teoretyczna* 2011, no. 2-3, p. 176; J. Bednarek, *Życie, które mówi Nowoczesna wspólnota i zwierzęta*, Warszawa 2021, p. 102 ff.

³ E. Bińczyk, *Epoka człowieka*, op. cit.

⁴ Ibidem, p. 121.

⁵ B. Latour, *Politics of Nature. How to Bring the Sciences into Democracy*, Cambridge, London 2004.

⁶ U. Beck, "Global Public Sphere and Global Subpolitics or: How Real is Catastrophic Climate Change?", [in:] U. Beck, *World at Risk*, Cambridge 2009, p. 81-108.

⁷ H. Welzer, *Climate Wars. What People Will Kill for in the 21st Century*, Cambridge 2012.

the categories and terms work in the social sciences and the humanities parallel to other ones, from theological or religious discourse: 'ecothology'⁸, 'save the creation'⁹, 'ecological spirituality'¹⁰, 'ecological conversion'¹¹, 'ecological apocalypse'¹², 'cosmos' which 'walks the way of the cross and resurrection'¹³ or 'cosmic brotherhood'¹⁴.

Is this ceasefire between the discourses of 'knowledge' and 'faith' just an accident, or is it perhaps a signal of some long-term regularity? What should be favourable and what should stand in the way of this surprising conjunction? In the face of the apathy of the Anthropocene and numerous ecological crises, would science and religion, having accepted each other's incompatibility and inconsistency, really be able to think and act for the common good in the long term, despite all their mutual prejudices? If so, what kind of concessions would both have to make? Perhaps, still, this kind of rapprochement is illusory, and the utopia of the mythical 'common good' would turn out to be just a pipe dream, a paltry consolation of two separate orders, which have not much time left anyway? Finally, does this peculiar, hybrid alliance have any bearing on pedagogical thinking? Although I find all these questions intriguing, I will certainly not be able to answer them in this study. Instead, I want to focus primarily on outlining a new-materialist, ethical and post-secular framework for this type of linguistic recognition and exemplify it with ecotheological arguments for establishing a new relationship between religion and matter as proposed by the philosopher of science and anthropologist Bruno Latour. Finally, I will try to signal the potential of such hybridization of language for pedagogical thinking.

⁸ B. Latour, "Will Non-Humans Be Saved? An Argument in Ecotheology", *Journal of the Royal Anthropological Institute* 2009, no. 15, p. 463.

⁹ T. Twardziński, *Ocalić stworzenie. Teoria i zastosowanie ekologicznej hermeneutyki Biblii*, Warszawa 2017.

¹⁰ Francis, Encyclical *Laudato si', mi' Signore. On care for our common home* (24 May 2015), Vatican 2015, p. 161 ff.

¹¹ A. Annett, Z. Radzik, "Wybór ekonomiczny jest wyborem moralnym", *Magazyn Kontakt* 2017, no. 34.

¹² E. Bendyk, *Ekologia i klimat, pokusa katastrofizmu*, <https://antymatrix.blog.polityka.pl/2019/12/23/ekologia-i-klimat-pokusa-katastrofizmu/>, access: 12.05.2021.

¹³ After: W. Hryniewicz, "Chrześcijaństwo a świat przyrody", *Miesięcznik Znak* 2008, no. 637.

¹⁴ S. Jaromi, "Na straży stworzenia", *Magazyn Kontakt* 2014, no. 26, p. 9.

THE HYBRID LANGUAGE OF 'THEO-ECOLOGY' – MATERIALIST, ETHICAL AND POST-SECULAR IMPULSES

It seems that the horror of the ecological crisis makes us think, speak and act in a *Totally New Way*. The capital letters and italics of the last words are by no means accidental: imparting new shapes and meanings to earlier ways of talking about the world bears the signs of a profound ecological trauma (among other things)¹⁵ and of an attempt at its overcoming. The earlier language at this stage of the history of Western philosophy seems to poorly reflect current imagery and states of the world, statuses of humas and non-humans. Let us recapitulate.

The social sciences and the humanities, in attempting to theorise a new type, have made numerous transgressions within it. For decades, with more or less care, they have been seeking support for it on a broader scale, including in science and technology studies (STS)¹⁶. The good old humanistic concern with thought is increasingly confronted in them with what can be called 'the material of the real'¹⁷, i.e. with matter, the real and the sensual. They reshape the language of talking about the world and generated within it ever new categories, better suited to the 'new times', often running contrary to established modern criteria of the division of the sciences¹⁸. Researchers representing such hybrid practices of thinking and speaking make up a broad, internally diverse current of new materialism(s).

This current has emerged as an attempt to overcome the legacy of broadly defined deconstruction and the ethical turn. The basic motivation here is the conviction that

¹⁵ The ecological crisis remains a fact of life that has dire consequences for philosophy. However, there is of course a broader, post-anthropocentric and post-humanist context for reflection on the condition of the planet and the people and non-humans who inhabit it. A sense of general disillusionment with the thought of the modern West seems to be reflected perfectly in the various philosophies of new materialism. In them, this weariness with the thinking of a mono-subject manifests itself in various ways. We see a turn towards life understood as a network of interrelations that spawn non-isolated organisms, see J. Bednarek, *Życie, które mówi Nowoczesna wspólnota i zwierzęta*, op. cit., p. 75.

¹⁶ See K. Abriszewski, R. Wiśniewski, "Wstęp", [in:] B. Latour, S. Woolgar, *Życie laboratoryjne*, Warszawa 2020, p. 17.

¹⁷ See E. Robakiewicz, Review "Nowa filozofia francuska", *Machina Myśli* 2014, no. 6.

¹⁸ See e.g. G. Deleuze, F. Guattari, *A Thousand Plateaus. Capitalism and Schizophrenia*, Minneapolis, London 1987.

the deconstructive conceptual apparatus is insufficient from the political point of view (because, as an anti-essentialist, it does not have a sufficiently strong concept of social change) and ontologically non-modern (because it is in fact an idealism indifferent to the latest scientific achievements). The unifying element of these theories, which are gaining momentum, has become a call for a renewed materialism that does not restore traditional forms of essentialism, but transforms the very concepts of identity and essence, opening up the possibility of their effective and critical application¹⁹.

The ecological crisis is thus no longer just a pressing internal problem for the earth sciences, but also a challenge for the social sciences and the humanities²⁰. At the same time, it is one of the key catalysts of ongoing theory-generating transformations occurring within these sciences. One type of theoretical perspectives must be highlighted here; it is the actor-network theory, originating in the STS²¹.

Krzysztof Abriszewski believes that it offers an opportunity for expanding ontological imagination beyond earlier, bipolar solutions such as nature-culture, or, within culture itself – beyond the ambivalent *freedom, creativity* on the one hand and *order, regularity* and *stability* on the other²². Following Bruno Latour, Abriszewski indicates that in 'cognitive' processes we never deal with a simple 'one cause-one effect' principle, but with whole chains (or networks) of actions. These networks are highly dynamic and are never fixed once and for all²³. Applying terms 'used' by various theories of this type, such as 'negotiations', 'black boxes', 'stabilisations' and 'punctualisations', Abriszewski indicates the irremovable and continuous processuality of the emergence and disintegration of cultural orders, their trajectories, dynamics

¹⁹ "Filozofie plastyczności i przygodności", *Praktyka Teoretyczna* 2018, vol. 28, no. 2 p. 8-9.

²⁰ Naomi Klein, for instance, directly calls climate change an existential crisis, see N. Klein, *This Changes Everything. Capitalism vs. The Climate*, New York 2014, p. 13.

²¹ See K. Abriszewski, "Teoria Aktora-Sieci Bruno Latoura", *Teksty Drugie* 2007, no. 1-2, p. 113-126.

²² See K. Abriszewski, "Teoria aktora-sieci jako teoria kultury", [in:] *Kultura nie-ludzka*, ed. A. Kil, J. Małczyński, D. Wolska, *Prace Kulturoznawcze* 2015, xviii, p. 101-105.

²³ See K. Abriszewski, "Teoria Aktora-Sieci Bruno Latoura", op. cit., p. 115. As one might guess, the dispute in science will therefore largely involve strengthening one's own network and weakening that of competitors.

and causality assigned by humans, non-humans, processes, and procedures²⁴. In principle, in posthumanism, which continues to use the category of culture, 'humans', guilty of all kinds of 'sins' of modernity and modern philosophy, ceases to be a measure of subjectivity. The bigger the distance to humans' central position, the more one hears a subject of a new type. As Joanna Bednarek observes, "one no longer speaks of life as encapsulated in individual organisms that can then be subjects of interests worthy of consideration; rather, one speaks of life as a network of interrelationships emerging from organisms that are never isolated"²⁵. Such an ecological and biopolitical approach to the subject will trigger ever new, transgressive fields of empathy. It will extend its 'cultural-natural' scope towards the *non-human*, towards animals, plants, matter, processes, machines; in a word – towards a world as a net-organism, as a complex and indivisible multiplicity.

Unfortunately, purely rational reasons were never enough to extend the fields of empathy indispensable for dealing with the ecological crisis.

Good arguments are not enough to make us act; they do not engage our emotions; they do not make the shifts in perception necessary to discern evil in what [...] constitutes 'normal practice'. [...] In addition, reason remains inseparable from a particular form of violence, no less terrifying than the violence of irrationalism: an essential dimension of [modern] analytic ethics remains the formulation of rules for making decisions, including decisions about who will live and who should die, without hesitation, without arbitrariness, based on accurate criteria²⁶.

The state of the world cannot therefore be corrected solely on the basis of what is rational. After all, according to some, modernity predicated on the 'rational' has led to the current ecological crisis. Critical of modernity, contemporary sciences attempt to 'generate' a new type of arguments and a new language that can cope with them, unhindered by old conventions. As Marcin Napiórkowski, a researcher of contemporary myths, stresses:

²⁴ See K. Abriszewski, "Teoria aktora-sieci jako teoria kultury", op. cit., p. 107.

²⁵ J. Bednarek, *Życie, które mówi Nowoczesna wspólnota i zwierzęta*, op. cit., p. 75.

²⁶ Ibidem, p. 96-97.

An effective fight against anti-scientific myths cannot be limited to refuting false information, because every debunked nonsense is replaced by three more. The discussion around the causes and effects of the climate crisis is a perfect example. Therefore, instead of being reactive, we should launch a counterattack. To begin with, we must understand the needs that pseudo-scientific content serves today, and the patterns that determine what we deem scary or menacing. Instead of debunking myths, we must learn to create our own myths!²⁷.

Thus, today we revert to religion and a religious language, which was seen as irrational in modernity. As Rosi Braidotti explains the post-secular turn:

A post-secular approach, posited confirm anti-humanist grounds makes manifest the previously unacceptable notion that rational agency and political subjectivity, can actually be conveyed through and supported by religious piety and may even involve significant amounts of spirituality. Belief systems and their rituals are perhaps not incompatible with critical thought and practices of citizenship²⁸.

Thus, within post-anthropocentric and post-humanist thoughts there are intriguing mixtures of languages and styles of speaking of e.g. the ecological crisis. The language of science is inspired here by the language of religion, and the other way around. As a result, the plea to save the planet seems to resound more powerfully and can appeal directly to 'hearts' and emotions better. Political action built on transcended empathy, to use Max Weber's term, gains an important causative potential, which cannot be overestimated in the face of the grim facts of the climate disaster.

FROM ECOLOGY TO SOTERIOLOGY – BRUNO LATOUR'S ECOTHEOLOGICAL ARGUMENT

The intriguing hybridisation of language is fittingly illustrated in scientific discourse by Bruno Latour's text "Will Non-Humans Be Saved? An

²⁷ M. Napiórkowski, "Dlaczego potrzebujemy mitów, żeby uratować świat?", <https://klimatyczneabc.uw.edu.pl/dodatki>, access: 7.07.2021.

²⁸ R. Braidotti, *The Posthuman*, Cambridge 2013, p. 35.

Argument in Ecotheology”²⁹. The author’s main claim is the conviction that one cannot do contemporary anthropology or stimulate ecological awareness without the ability to understand and ‘speak in tongues’, i.e. without “to be sensitive to each of the original ways of speaking truthfully which have been developed and nurtured”: scientific, legal, political, but also religious³⁰. The concept of a ‘negotiable’ approach to agency and policy, key for solving problems of common good also in language, is developed by Latour in the book *Politics of Nature*. Here he stresses that “Everything is negotiable, including the words ‘negotiation’ and ‘diplomacy’, ‘sciences’ and ‘democracy’—simple white flags waved at the front to suspend hostilities”³¹. In his view, current eco-friendly policies, which boil down, for example, to the widespread mobilisation of the ‘rich North’ to segregate waste, give up plastic or turn off the water while brushing teeth, are marked not only by a highly illusory efficiency (as Latour observes, “When the first tremors of the Apocalypse are heard, it would seem that preparations for the end should require something more than simply using a different kind of lightbulb...”³²), but also by a dark shadow of ethnocentric pride.

According to the French philosopher, ecology should be practiced in a religious way, because religious passions have the potential of mass agency. In his opinion, modernity has robbed religion of this kind of energy, causing a progressive shrinkage of the religious ethos and reducing religion to the non-political private sphere. Religion could, however, gain a renewed chance to enter the game, a chance to postpone the ‘inevitable apocalypse’. It might become an alternative to modernisation and a powerful aid to environmentalism. There are, however, certain preconditions imposed on thinking which religion would have to confront first. Their illumination requires a correction of modern conceptions of the so-called ‘natural world’ and a transformation by religion of its own attitude toward matter.

In his further explanations, Latour refers to two orders, two layers of meaning within what is commonly referred to as ‘the natural world’ or ‘the material world’, to *reference* and *reproduction*. *Reference* involves

²⁹ B. Latour, “Will Non-Humans Be Saved?”, op. cit., p. 459-475.

³⁰ Ibidem, p. 460.

³¹ B. Latour, *Politics of Nature*, op. cit., p. 221-222.

³² B. Latour, “Will Non-Humans Be Saved?”, op. cit., p. 462.

the ways of ordering so-called reference chains to be able to adequately fulfil the task of providing knowledge of “far-away entities and processes of all kinds”. *Reproduction* involves the ways of beings themselves sustaining life³³. The author indicates that modern teaching about ‘the world of nature’ erroneously identified or mistook these orders. As a result, referential principles of cause-and-effect chains, identified with scientific procedures of generating knowledge of the world, were projected onto processes linked with reproduction. In other words, despite the different logic and patterns of these processes, reproduction was ‘read’ as one reads ‘reference’. This has led to the creation of the modern illusion of cause-effects and ‘indisputable necessity’ in the ‘natural world’, imagery associated with some transcendent force, some mythical ‘order’ of nature, which the determined matter understood that way would follow. As Latour points out, this modern ‘spiritual’ force imposing supposedly necessary meanings on the world of matter, be it Blind or Smart (the figure of the Blind Watchmaker or Smart Design), has become a phantasm which erroneously attributes spirituality to what is material, while Reproduction is a separate, autonomous and causative process. “Let us at last secularize the world of reproduction. Saint Darwin pray for us to succeed”³⁴, calls the author somewhat sarcastically, directing attention to the mechanism of creativity and causality of matter and non-human actors, crucial for reproduction. In other words, it is the organisms themselves that decide about their own significance. Creativity emerges where these organisms encounter gaps and ruptures. Then, without the support of any transcendent force, without a pattern, they face the risk of reproduction in an all-too-spontaneous and undetermined way in an attempt to prolong, perpetuate and duplicate their existence. As the philosopher explains in a post-humanist vein,

Non-humans have not been emerging for aeons just to serve as so many props to show the mastery, intelligence, and design capacities of humans or their divine creations. They have their own intelligence, their own cunning, their own design, and plenty of transcendence to go on, that is, to reproduce³⁵.

³³ See *ibidem*, p. 466.

³⁴ *Ibidem*, p. 472.

³⁵ *Ibidem*.

Freed from theological or crypto-theological thinking, this state of the world of matter, diagnosed by a philosopher inspired by evolutionary biology, would be both an opportunity and a challenge for religion in the context of the ecological crisis. The modern approach to 'the world of nature' made religion withdraw from its relationship with matter. It has turned either to the 'inner sanctuary of the soul' or to the supernatural. Both entail an abandonment of 'creation'. By renouncing its claim to influence the course of events, religion betrayed creation, ceased to care for it and its 'salvation'³⁶. Latour sees, however, the chance of religion redeeming its trespasses against matter. The opportunity could be found in two ideas that are particularly familiar to the 'modern' version of religion, namely Roman Christianity. One is the idea of radical transformation, a fundamental change in everyday life ('*metanoia*', 'conversion', 'Earth's renewal'). The other is 'incarnation', an artificial transformation of the world in the Eucharist (transubstantiation). Latour pins on them a hope of a return of religion to the material world. A gesture of religious transformation and a transformation of things might restore matter to religion, simultaneously changing its status: modern 'nature', discredited, excluded from the field of religion, would be permanently replaced by the theological 'Creation'. Bruno Latour concludes his lecture:

'Creation' could instead be the word to designate what we get when Reproduction and Reference are seized by the religious urge radically to transform that which is given into that which has to be fully renewed. The dream of going to another world is just that: a dream, and probably also a deep sin. But to seize, or seize again, this world, this same, one and only world, to grasp it *otherwise*, that is not a dream, that is a necessity³⁷.

The reconstructed example of Bruno Latour's so-called ecotheological argument illustrates well the process of hybridization of the language which is used to talk about the ecological crisis. It is no coincidence that combining categories drawn from the language of science and religious discourse captures the spirit of science and technology studies (STS), where the category of hybridity is one of the most theoretically

³⁶ See *ibidem*, p. 465–466.

³⁷ *Ibidem*, p. 473.

significant ones. Thus, if contemporary philosophical theories and the humanities, inspired by the latest technologies and neuroscience, unabashedly surrender to the post-secular practices of drawing from the reservoir of fields of religion considered irrational and unscientific, from their theories, imaginaries, concepts, and language, without losing their scientific identity and critical distance from religious ideologies, then also general pedagogy could, on similar grounds, deal with the study of religion and seek in it inspiration for its own theoretical solutions.

What is particularly telling is that within religion itself, even the confessional religion of monotheistic Christianity, readings of biblical texts which firmly turn towards scientific and ecological propositions are increasingly common. I think here of biblical radical ecological, deconstructive-reconstructive hermeneutics³⁸, rejecting the anthropocentric perspective of reading a biblical text for the sake of the 'Earth's perspective'. Tomasz Twardziłowski explains the turn as follow:

the Earth's problem needs an answer, not from human beings, but from the Earth that is capable of solving its own problems provided it is listened to. This form of ecological hermeneutics of the Bible suspects the biblical texts, written by a human hand, of reflecting human interests at the expense of the non-human members of the Earth community, whose suppressed voice must be restored³⁹.

Since Latour's 'negotiations' relate today to such unobvious contacts as STS and humanities, or science and religions, it would be worthwhile also in the field of pedagogy to attempt to transform the theoretical foundations of its sub-discipline, which is the pedagogy of religion, regrettably appropriated by theologies and confessional ideologies. After all, the theoretical potential of religions taken up in the way it occurs in interdisciplinary religious studies, with more than one theory of religion, has a lot of potential. Addressing concepts used in religious studies, such as a ritual of radical micro-sociology by Randall Collins⁴⁰,

³⁸ See T. Twardziłowski, *Ekologiczna hermeneutyka Biblii*, Warszawa 2015, p. 85-86. See T. Twardziłowski, *Ocalić stworzenie*, op. cit.

³⁹ T. Twardziłowski, *Ekologiczna hermeneutyka Biblii*, op. cit., p. 86.

⁴⁰ See R. Collins, *Interaction Ritual Chains*, Princeton, Oxford 2004.

the concept of invisible religion by Thomas Luckmann⁴¹, tapping into economics, teaching theory and cultural anthropology of Stark and Bainbridge's theory of religion⁴², or Polish studies by Rafał Włodarczyk on the concept of religion as a general theory of ideology⁴³ or Maciej Czeremski's studies on the evolutionary and cognitive foundations of myths⁴⁴, and of many other theoretical frameworks used for a long time in the social sciences, especially in religious sciences, regrettably left out by pedagogy dealing with religion, might prove rejuvenating for pedagogy itself. Their theoretical potential could provide a major impetus for integrating the topic of religion with new-materialist, post-secular, non-anthropocentric, posthumanist, and pro-ecological thought. The impulse comes from Bruno Latour's hybrid concept, reconstructed in the study, conducive to constructing a pedagogy that could become a pedagogy of *religion* instead of a *religious* pedagogy.

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⁴¹ See T. Luckmann, *The Invisible Religion. The Problem of Religion in Modern Society*, New York 1967.

⁴² See R. Stark, W. S. Bainbridge, *A Theory of Religion*, New York 1987.

⁴³ See R. Włodarczyk, *Ideologia teoria edukacja Myśl Ericha Fromma jako inspiracja dla pedagogiki współczesnej*, Kraków 2016.

⁴⁴ See M. Czeremski, *Mit w umyśle Ewolucyjno-kognitywne podstawy form mitycznych*, Kraków 2021.

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BETWEEN ORTHODOXY AND HERESY IN THE PEDAGOGY OF RELIGION. THE HERMENEUTIC AND AESTHETIC INSPIRATIONS BY THE THOUGHT OF GIANNI VATTIMO, LUIGI PAREYSON AND ERIKA FISCHER-LICHTE¹

ABSTRACT:

The subject of the study is a project of 'weak' pedagogy of religion. This project is inspired by post-metaphysical thought of Gianni Vattimo. Poor ontology and radical hermeneutics become a strategy of opening the pedagogy of religion to heresy, i.e. ambiguity, polyphony of interpretation of texts, artefacts, and religious practices. Thanks to this, the traditional pedagogy of religion gains the possibility of seeking inspiration for itself on new, non-theological borderlines of aesthetics and performativity. Two examples of such references are mentioned in the study: Luigi Pareyson's aesthetics of formativity and Erika Fischer-Lichte's aesthetics of performativity. They show interesting examples of progression from orthodoxy to heresy in the 'weak' pedagogy of religion.

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KEYWORDS:

radical hermeneutics, Gianni Vattimo, weak thought, Religious Education, Luigi Pareyson, aesthetics of formativity, aesthetics of performativity, Erika Fischer-Lichte

*Principles are long, life is short.
[...] because our death comes
more quickly than the principles
do—which is why we are forced to
bid them farewell. This is why the
finite human creature [...] must
live without principled justification
(so that conscience is always
more a solitary than a universal
thing, and maturity is above all
the capacity for solitariness)
Odo Marquard, Farewell
to Matters of Principle ²*

Behold two scholars engrossed in their own work.

The task of one is to remain faithful. Constancy, permanence, tradition. He carefully takes on the wisdom of his masters in order to pass it on to his pupils as accurately and as unerringly as possible. Transcription. Meticulous attention to the minutest detail. A sacred commitment to the past, honouring it in a message for the future where ‘not a single jot, not a single line...’.

The same truths cannot be differently expressed, for if they could be they would cease to be themselves. The use of inadequate symbols is not only error; it is also profanation both of the knowledge and of the holy object matter to which it refers³.

The task of the other scholar is to effect change, embolden, awaken and enliven. Motion. Transgression. Truth sprouts new leaves, penetrates

² O. Marquard, *Farewell to Matters of Principle*. *Philosophical Studies*, New York, Oxford 1989, p. 16.

³ F. Znaniecki, *Social Role Of The Man Of Knowledge*, New York 1940, p. 103.

thoughts and experiences from beyond its old self. The conscientiousness of reproduction gives way to the passion for innovation. The work of the latter scholar is like laying successive layers of fabric on the needle, like combining its separate parts, like sewing new patterns into the smoothness of the matrix, embroidery linking the source with the novelty. The wisdom of the first masters is subject to this movement; it is enriched, developed, multiplied. How to reconcile the readiness to violate the source truth and the fear of losing it with the overwhelming desire for development and change? This question, although posed in reflection on the work of religious scholars, or, as F. Znaniecki argues, the founding fathers of modern knowledge in general, is still valid today. Between continuity and change. The core of 'truth' and its margin. Orthodoxy and heresy.

...

My attention, also this time, is drawn to the interface between pedagogy and religion. I wonder about the significance of Znaniecki's illustrations for a sub-discipline close to me, for the pedagogy of religion⁴. I return to the questions that I have pursued for some time: does the metaphor of the Polish sociologist imply that the work of the second scholar significantly enriches the work of the first, or rather that it weakens or neutralizes it? Is it possible to hold as certain that the successive overlapping layers of thought and practice resulting from the historical and hermeneutical work on the tradition of sources rob it of the unique 'truth', impoverish it, or rather stimulate this tradition to develop? In addition, who, when and on the basis of what regulations should decide about it?

Znaniecki's reflection contains an interesting, thoroughly hermeneutical and mediating solution.

⁴ The pedagogy of religion in the remainder of the study will be seen in its connection with the Christian tradition, defined after Bogusław Milerski as a (sub)discipline concerned with the educational potential of various forms of religion and the formulation of theories of religious education and religious socialization in the area of the Church, family, school, and society. Pedagogy of religion understood in this way would integrate pedagogical and theological norms, making the subject of its interest both pedagogical reflection and practical theology. See B. Milerski, *Hermeneutyka pedagogiczna. Perspektywy pedagogiki religii*, Warszawa 2011, p.140.

Religious scholars throughout the world have achieved it by applying always the same guiding principle: Whatever in the domain of knowledge is verily true cannot be new; whatever is new must be false. The total Truth, including all the partial truths ever to be known, was already known to the spiritual ancestor of the school— god, demigod, or divinely inspired superman⁵.

Commentaries, on the other hand, i.e.

The second method of interpretation permits the religious scholar to re-discover certain holy truths which his immediate predecessors for some reason have failed to transmit or even truths which the spiritual ancestor of the school, knowing that mankind was not yet prepared for them but foreseeing that their disclosure would come in the proper time, intentionally failed to reveal at tire beginning⁶.

Both scholars, fulfilling their tasks, act in line with the nature of the source.

As the hermeneutics scholars André La Cocque and Paul Ricoeur comment on the well-known question:

the plurivocity of the text and a plurality of readings are connected phenomena. Hence the text is not something unilinear – something it could be in virtue of the finality instituted by the presumed intention of author – but multidimensional, as soon as it is not taken as something to be read on just one level but on several levels at the same time by the historical community marked by heterogeneous interests. Just as a work of art solicits several interpretations whose cumulative effects are meant both to do justice to the work and to contribute to its subsequent life, the ways in which the interpreting community process a historical reading and interpretation contributes to the pluridimensionality of the text. These become part of the text⁷.

⁵ F. Znaniecki, *Social Role of the Man of Knowledge*, op. cit., p. 105.

⁶ Ibidem, p. 108.

⁷ A. LaCocque, P. Ricoeur, *Thinking Biblically. Exegetical and Hermeneutical Studies*, Chicago, London 2003, p. xv.

Justifiably, inspiration for further reflection is contingent on the story of religious scholars. It seems that the problem of norm and departures from norm, tradition and progression occupies pedagogical thought to a similar extent as they do religious studies. What deserves special attention here is the meaningful potential contained in the categories of orthodoxy and heresy, categories referring to the problem of 'source' and 'commentary', of what is the norm and what is not, categories prompting questions about the fate of orthodoxy infected by heresy and questions about the inner dynamics of their reciprocity. The above question also triggers reflection on the causal power of the heresies themselves: how far from the source of the tradition and to what extent and with what effect will phenomena and processes originally associated with that tradition (religious or pedagogical), under the influence of the heresy, still be identified with it?

Religions know and recognize the phenomenon of heresy within them. Heresies emerge from them as new currents of thought, practices or rituals which, initially linked to religious or confessional sources, become autonomous under certain circumstances and often create completely new religious qualities⁸. Others arise independently of religion, securing the needs to which religion was previously supposed to respond. In pedagogical thinking, too, after defining orthodoxy, it is possible to indicate phenomena and entire pedagogical tendencies whose distinctiveness is based on opposition to tradition, on pedagogical *heresy*⁹. Since in both fields, the field of pedagogy and the field

⁸ Christianity itself, after all, emerged from Judaism, initially being one of the many Jewish sects, which only in time became a separate historical religious tradition. Among local scholars of specific religious phenomena, however, there are usually numerous and protracted disputes about the boundaries between what is still an attempt at reform within the tradition and what can already be recognized as a new quality, or heresy. This applies mainly to the Christian tradition, where attachment to orthodoxy can be very strong, while in Judaism the Talmudic tradition of commentary is a sanctioned hermeneutical practice. An example of a Christian dispute about the actual status of heresy can be found in the discussion around lesser medieval, pre-Reformation movements within the mainstream tradition (eastern and western), i.e. Paulicianism, Bogomilism and Catharism, see P. Czarnecki, *Kataryzm włoski. Historia i doktryna*, Kraków 2013.

⁹ The subject of heresy in pedagogy deserves to be probed in depth on another occasion. Meanwhile, suffice it to say that for a long time, anti-pedagogy was regarded as the 'main' heresy in pedagogy. Without trying here to justify or criticise this approach, it is worth pointing to at least one 'proof' of heretical nature of this trend. For the theory of

of religion, both the category of heresy itself and the dynamics of its emergence from orthodoxy seem to be present and recognizable, it is worth looking from their perspective at the previously indicated borderline of both fields, namely the pedagogy of religion as a specific space of two types of thinking, a subdiscipline in a way doubly 'exposed' to the impact of heresy. Hence the questions, as it seems, crucial for the reflection contained in the further part of the considerations: how far can these 'heretical' 'commentaries' (the work of the second scholar) shift the boundaries of the traditional pedagogy of religion, raised, after all, on the basis of the orthodox reading of the source text, a pedagogy most often seen confessionally, transmissive, oriented towards a precisely defined formation of the subject? In what research spaces, after a possible transgression, could this sub-discipline look for inspiration for further development?

In the further part of the study I will recall the main topics of Gianni Vattimo's radical hermeneutics, which seems to be an important strategy for considering heresies in the pedagogy of religion, a strategy of weakening strong ontology in philosophical and ideological conceptions in this field, a strategy of 'unsealing' orthodoxy and opening it up to what is 'heretical'. According to Vattimo's intuitions, such weakening of orthodoxy makes it possible, in the next step, to take experience and thought beyond the limits of what is identified only with pedagogy or religion, towards what is related to art and performative aesthetics. The last part of this text will be devoted to this transition.

upbringing oriented teleologically and in axiological terms, the approach of anti-pedagogy to the problem of good and evil is sometimes regarded as clearly anti-pedagogical. As H. von Schoenebeck writes, "Developmental changes in our lives do not take place vertically, upwards, but horizontally. Therefore, all my reactions and behaviour have a subjective meaning: impatience, stress, aggression, etc. They cannot be evaluated from the perspective of 'good&evil', because there are no objective measures for evaluating behaviour. In human relations, therefore, we never make mistakes, we never do evil. Therefore, we do not need to improve ourselves according to external directives, evaluations, we do not need to self-evaluate. It is enough to be ourselves and to enter into natural, open, authentic relationships with other people, just as we do as adults towards our partner whom we bestow love upon" (H. von Schoenebeck, "Rozstanie z pedagogiką", [in:] *Edukacja alternatywna. Dylematy teorii i praktyki*, ed. B.Śliwerski, Kraków 1992, p. 253).

WEAK THOUGHT (KENOSIS) AND THE PRINCIPLE OF PRODUCTIVE INTERPRETATION IN GIANNI VATTIMO'S RADICAL HERMENEUTICS

In the article “Hermeneutyka słabej myśli Gianniego Vattimo jako inspiracja dla pedagogiki religii”¹⁰ I outline a ‘weak’ pedagogy of religion project. The starting point for this project is *kenosis*¹¹, the Christian idea of God’s incarnation understood as diminishment and weakening. The myth of the incarnation and crucifixion of God, according to Vattimo, expresses the sense of aspiration of hermeneutics itself. ‘Weak thought’ finds its expression in the specificity of ‘post-metaphysics’, in the perspective of ‘decomposition’ and ‘dispersion’ of the total and comprehensive (also of the sense of history), in the abandonment of essential and dogmatic thinking. The ‘program’ of a weak ontology holds that such a change in the way of thinking about fundamental traits seems to be thoroughly Christian, since it assumes that “*the transcendental, or that which makes any experience of the world possible, is nothing less than transience [caducità]*”¹². Being is not, but happens, it is what accompanies as a frailty all our representations. “To recall Being means to recall such transitoriness. Thinking the truth does not mean ‘grounding’, as even Kantian metaphysics maintains. It means rather revealing the waning and morality which are properly what make up Being, thus effecting a breaking-through or *de-grounding*”¹³. The formula of weak thinking is oriented towards a non-metaphysical conception of truth akin to the experience of art rather than the positivist model of scientific knowledge¹⁴.

¹⁰ See M. Humeniuk, “Hermeneutyka słabej myśli Gianniego Vattimo jako inspiracja dla pedagogiki religii”, *Forum Pedagogiczne* 2019/2 part 1, p. 119-131.

¹¹ See G. Vattimo, *Poza interpretacją. Znaczenie hermeneutyki dla filozofii*, Kraków 2011, p. 61 [G. Vattimo, *Beyond Interpretation. The Meaning of Hermeneutics for Philosophy*, Stanford 1997].

¹² G. Vattimo, “Dialectics, Difference, Weak Thought”, [in:] G. Vattimo, *Weak Thought*, New York 2012, p. 47.

¹³ *Ibidem*, p. 48.

¹⁴ I wrote about it in: M. Humeniuk, “Między katechizmem a biblioteką – w stronę inkluzyjnej pedagogiki religii”, [in:] *Między ekskluzją a inkluzją w edukacji religijnej*, ed. M. Humeniuk, I. Paszcenda, Wrocław 2017, p. 125.

Discussing in the above text¹⁵ the hermeneutical 'coordinates' of the Italian philosopher's concept, I pointed out two key factors¹⁶. The first premise is connected with the necessity of recognising the secondary nature of truth perceived as conformity to so-called eternal, objective facts, truth treated as a reflection of the 'actual' state of affairs, and the necessity of recognising the historicity, or finiteness, of primary truth. The second premise is connected with the necessity of recognising tradition, within which truth may reveal itself and be subject to hermeneutical principles of verification and falsification.

In the first case, philosophical aspirations aiming at establishing ontologically strong, certain and fundamental truth are suspended. The 'actual' state of affairs, as the Italian hermeneutist proves, cannot be stated clearly and distinctly, timelessly and unconditionally. The world is a field of incessant conflict of interpretations, where every argument put forward to support a particular reason is underpinned by an awareness of its own particularity and limited access to knowledge. This postulated 'factual state of affairs' inevitably remains a philosophical and persuasive interpretation of a particular historical situation. As is the case in all post-metaphysical philosophy, also in Vattimo's work there is a clear shift of focus from metaphysics to ethics. For the subject is not the bearer of the Kantian a priori, but the inheritor of a historical, finite language that enables and conditions its access to itself and to the world, and thus an ethical subject, acting in the world and exerting an ethical influence on it¹⁷.

In the second premise, Vattimo indicates and develops the ideas of a unique union of hermeneutics and the tradition of Christianity, stressing that "Modern philosophical hermeneutics is born in Europe only because it is here that the religion of the book is present, focusing attention on the phenomenon of interpretation; and because this interpretation is based on the idea of the incarnation of God, understood as *kenosis*"¹⁸. According to Vattimo, the Christian 'event' of salvation, God's incarnation, is a purely hermeneutical fact: being the actualization of the Old Testament prophets' announcements, it turns out not only to be the fulfilment

¹⁵ See M. Humeniuk, "Hermeneutyka słabej myśli Gianniego Vattimo jako inspiracja dla pedagogiki religii", op. cit., p. 119-131.

¹⁶ See G. Vattimo, *Poza interpretacją*, op. cit., p. 19.

¹⁷ See *ibidem*.

¹⁸ *Ibidem*, p. 61.

or decipherment of the sense of the prophecies, but also a stage in the hermeneutical process of interpreting the history of salvation, followed by the era of the Spirit animating the text. The Spirit is, as the philosopher underlines, the most *hermeneutical* person of the Trinity¹⁹, a safeguard of the ongoing updating and enriching of the history of salvation. Vattimo calls this principle an *idea of productivity of the interpretation act*. It means that “interpretation is not only an attempt to grasp the original meaning of the text (for example, the authorial intention) and to reproduce it as literally as possible but also to add something essential to the text [...]”²⁰. Productivity of interpretation is in a sense paradigmatic for European culture, which has understood that commentary is not casual, instrumental or secondary, but the actual effect of interpretation to which this culture has subjected the Christian message²¹. According to Vattimo, the encounter of the ‘kenotic tendency’²² with the idea of *productive interpretation* helps to see the secularisation of Western culture not as a process of linear and progressive rejection of the Christian heritage, but rather as a token of topicality of the Christian message.

This is where the formula for the work of the ‘second scholar’ comes to the fore; the work of the polyphonicity of myth, of releasing and developing new meanings within the old tradition. Each articulated version becomes a new quality, a new ‘heresy’, significantly different from orthodoxy and at the same time organically connected with it through reference to tradition and its origins. In such a perspective, every novelty, every subsequent work of art, text or commentary inspired by and produced in the field of Christian tradition within a particular interpretative community can be considered a legitimate manifestation of hermeneutical interpretative work.

For the pedagogy of religion, the adoption of Vattimo’s principle of *kenosis* along with the hermeneutic principle of *productive interpretation* may be a new way of thinking about the sub-discipline. I called the formula quoted in the text²³ as the project of a ‘weak pedagogy of

¹⁹ See G. Vattimo, *After Christianity*, New York 2002, p. 60.

²⁰ Ibidem, p. 62-63.

²¹ See ibidem, p. 63.

²² See G. Vattimo, *Poza interpretacji*, op. cit., p. 66.

²³ See M. Humeniuk, “Hermeneutyka słabej myśli Gianni’ego Vattimo jako inspiracja dla pedagogiki religii”, op. cit., p. 119-131.

religion'. In the first step, as I have already signalled in the introduction, it would be characterised by a weakening, an 'unsealing' the orthodox and dogmatic versions of the Christian message, versions legitimised by the official teaching of individual religious institutions, versions which form the basis of a transmissive, kerygmatic pedagogy of religion. In the second, those versions of the Christian message which, due to their unorthodoxy, used to arouse distrust. As such, they were usually depreciated or completely excluded from the mainstream tradition. They functioned at most on the periphery of pedagogy and religion as niche or quite 'outlaw' heresies without a chance for recognition of the official teaching of church teaching offices, in which their potential was often shown as cognitively and pedagogically 'suspect'²⁴. The so-called 'weak' pedagogy of religion would create space for their legitimacy; here they would gain the possibility of 'legal' articulation and transmission within local interpretative communities, certainly niche, but still remaining in the field of legitimizing tradition of Christian message. Their inclusion in the field of pedagogy of religion, or more specifically, the 'weak' pedagogy of religion, seems to have a worthwhile pedagogical potential, which I addressed in the aforementioned article²⁵. In this text, I would like to pay special attention to the topic of religious experience and the potential of related reflection by the hermeneutical strategy of 'heretical' *kenosis* within a traditional, orthodox pedagogy of religion. In the strongly ontological metaphysical reflection at the interface of pedagogy and religion, in the reflection characteristic of traditional pedagogy of religion, the cognitive formation of the subject was prior to experience. The main goal was to equip it with a stable system of beliefs (doctrines) and related rituals, i.e. religious practices.

In the case of a 'weak' pedagogy of religion, the situation is reversed: experience takes precedence over cognitive formation (although, of course, this does not mean that reflection on the experience itself is deprived, but only secondary to it). *Kenosis* and the principle of *productive interpretation* as hermeneutical strategies of influencing the subject open up a space for the specific 'practicing' and 'talking about' religious experience. Together with the logic of the 'second scholar',

²⁴ See *ibidem*, p. 127.

²⁵ See *ibidem*, p. 119-131.

the logic sanctioning the interpretative polyphony of tradition, opening the subject to what is unorthodox and heretical, the pedagogy of religion gains the possibility of new, creative ways of *co-operation* with tradition. This *co-operation* helps to move the sub-discipline to another borderland, this time the borderland of pedagogy, religion and art. Here religious experiences gain a certain analogy in relation to aesthetic experiences (and vice versa), thanks to which it is possible to 'speak' about them in the language familiar to art theories.

In the final part of these considerations I would like to point to two inspiring concepts from this extremely broad field: Luigi Pareyson's concept of the operational 'aesthetics of formativity' and Erika Fischer-Lichte's concept of the aesthetics of performativity. Both develop the topic of aesthetic experience, opening, by analogy, the space for reflection on religious experience. They are at the same time an illustration of an interesting progression, a dynamic set in motion by hermeneutical *kenosis* and the principle of *productive interpretation*, a process of gradual shift of reflection on pedagogy and religion from the orthodox core towards heresy: a polyphony of meanings, practices and... experiences themselves.

THE EXPERIENCE OF ART VS. THE RELIGIOUS EXPERIENCE – THE AESTHETICS OF FORMATIVITY AND THE AESTHETICS OF PERFORMATIVITY ACCORDING TO LUIGI PAREYSON AND ERIKA FISCHER-LICHTE

Luigi Pareyson is an Italian hermeneutist, a master of Gianni Vattimo, who often refers to him in his texts. Pareyson's philosophy is known as the 'ontology of freedom'²⁶ or 'hermeneutics of myth'²⁷, and the aesthetics he derives from it is called the 'aesthetics of formativity'. The ambition of his hermeneutics is to describe and understand a work of art and the process of creation. As he himself emphasizes, his aesthetics is a concept that

²⁶ See L. Pareyson, *Ontologia della libertà. Il male e la sofferenza*, ed. G. Riconda, A. Margis, F. Tomatis, Torino 1995, after: G. Vattimo, "Przedmowa do wydania polskiego", [in:] L. Pareyson, *Estetyka. Teoria formatywności*, Kraków 2009, p. 9.

²⁷ See G. Vattimo, "Przedmowa do wydania polskiego", op. cit., p. 10-13.

as a result of reflection on aesthetic experience, turns to determine its sense and potential [...] [this aesthetics – MH] is not a metaphysics of art, but an analysis of an aesthetic experience. It is not an abstract definition of art considered as such, but it is a study of a human being who makes art, a human being in the act of making art. It is a philosophical reflection on an aesthetic experience undertaken to address it, demonstrate its possibilities, define its scope and limits, clarify its human significance, and unfold its universality²⁸.

Associated with individual experience, it comes in an almost infinite spectrum of versions, diverse yet equal aesthetics, poetics and art programmes on the one hand, and individual readings, aesthetic experiences on the other.

Sometimes we saw it as a revelation of the deep sense of things, a symbol of cosmic life, a patron of the mysteries of the universe, an initiator of the inner magic of reality, and sometimes as pure play and pure love, satisfied with itself and its own lightness. At other times we treated it as an interpreter of reality, a faithful imitator of nature, a merciless representation of facts, and sometimes as a dream, a delirium, a flight of fancy, a struggle with reality, the creation of a new, unknown reality, pure abstraction based on itself [...]. Sometimes it was an escape from life, a longed-for respite from the world and from human passions, a refuge of the soul in the pure contemplation of fantastic figures and dreamed worlds, a spiritual remedy for the anxiety of human activity. Sometimes it was a necessary manifestation of public and social life²⁹.

Each of its aspects expresses a spirit of a moment in the history of an individual and a society.

‘Formativity’ for Pareyson is a “an inseparable union of production and invention: ‘formation’ means making and at the same time figuring out a ‘manner of making’”³⁰. In a sense, every human action is formative; however, formativity related to a work of art seems to reveal its uniqueness and exceptionality which translates not only into the act

²⁸ L. Pareyson, *Estetyka. Teoria formatywności*, op. cit., p. 18 [L. Pareyson, *Estetica. Teoria della formatività*, Milano 1988].

²⁹ Ibidem, p. 336.

³⁰ Ibidem, p. 19-20.

of creation, complex as it unites in the work the body with the spirit, the physical with the spiritual, the artist with matter and the law of art, but also the exceptionality resulting from the act (process?) of recognising the work of art:

The work of art reveals its own irreplaceable perfection only to someone who is able to grasp it in the process of finding conformity with itself. Then the work appears as final and unmodifiable in its 'finiteness', only then do we perceive the fecundity flowing from its 'model character'. [...] And only then can one truly 'read' and 'judge' a work. Reading means also performing, which means bringing a work of art to life in the way it wants to be brought to life. Judging, on the other hand, means comparing the work as it is with what it would like to be. Both are possible only if we understand the work as a law unto itself³¹.

Usually religious theories as well as theories of art point to an important aspect of the inner experiences of the subject, difficult to express and describe, connected with symbols and metaphors. Thus, in Pareyson's existential description of the aesthetic experience and the creative process itself, religious experience can also easily recognize itself: it is anthropological rather than metaphysical, individual and internal. The abstract, metaphysical, totalizing concept of art which Pareyson firmly rejects can be compared with the general if vague category of religion usually in the 'service' of the traditional model of pedagogy of religion. It assumes the form of a universal credo of faith, a static doctrine and permanent orthodoxy, hardly translatable to the experience of an individual subject. Both the creation of a work of art and its contemplation are for the Italian philosopher strongly individual and particular acts or processes, impossible to reproduce in other configurations. The weak pedagogy of religion, by legitimising polyphony and heresy, creates better conditions for such individual, existential experiences than the traditional, kerygmatic pedagogy of religion geared primarily towards the formation of the collective subject.

While Vattimo's kenotic pedagogy of religion, paradoxically, derives its strength from weakening ontology and orthodoxy, including

³¹ Ibidem, p. 20.

dogmatic interpretations of the texts and artifacts of the source tradition, and Pareyson's aesthetics of formativity redirects attention from cognitive formation to the problem of understanding (of the process of creation, the work of art and aesthetic experience), then the aesthetics of performativity can be considered the next significant step in the hermeneutical parting with a strong ontology. This would be a step towards not so much the *understanding* of a text, dogma or rite, but rather towards *experience* in itself and the attendant *transformation* of the subject. The aesthetics of performativity shifts the focus from the notion of *work*, strongly ontological in this concept, to that of an *event*.

As the German professor of theatre studies Erika Fischer-Lichte explains, in performativity the subject-object dichotomy is broken down and neutralised. This dichotomy is replaced by a dynamic interdependence, in which the position of subject and object is often impossible to determine; nor can they be clearly distinguished from each other. In the traditional view, the work of art or the actor becomes a subject that produces meanings, which are then transmitted towards the recipient of the work or the viewer. In the aesthetics in question, signs and arbitrary meanings are deconstructed. Analysing the performance of the artist Marina Abramović, Fischer-Lichte explains this new dynamic:

the spectators' physical reactions were a direct result of their perception of Abramović's actions, but not of the possible meanings that those actions might carry. When Abramović cut the star into her skin, the spectators did not hold their breath or feel nauseous because they interpreted this as the inscription of state violence onto the body but because they saw blood flowing and imagined the pain on their own bodies. What the viewers perceived affected them in an immediate, physical way. The materiality of her actions dominated their semiotic attributes. As such, their materiality is not to be seen as a bodily excess, in the sense of an unresolved surplus that could not be worked into the meanings that were attributed to those actions. Rather, the materiality of Abramović's actions preceded all attempts to interpret them beyond their self-referentiality. It did not yield to and dissolve into a sign but evoked a particular effect on its own terms and not as the result of its semiotic status. This very effect – holding one's breath, the feeling of nausea – set the process of reflection in motion for the audience. Rather than addressing the possible meanings

that Abramović's actions implied, the spectators wondered why and how they reacted. How do effect and meaning relate in this case?³².

In this way a new relationship of feeling, thinking and acting is established.

The aesthetic of the performative uses *significance* in a novel and unique manner. In the course of a performative event, they (*signified*) are used as a kind of pretext drawing the recipient into the event, in order to leave him or her alone a moment later, disconnected from their signs (*signifier*). Disorientation becomes in this way a source of new meanings, which are the basis for reflection, crucial for the viewer taking part in the event. Performative acts (as physical actions) should be treated as 'non-referential' because they do not refer to something that pre-existed or exists within the event, to some substance or essence. Performance is about feedback created in a situation of co-presence and interaction; it is the principle of unexpected exchange, of mutual, unpredictable interaction. Even if the event itself were meticulously designed and carefully directed, the ultimate outcome of the generated experience and the meanings that the subject ascribes to it should be treated as unpredictable and impossible to repeat or recreate. They remain nonetheless, or rather because of this, strongly experienced, existentially authentic and responsible for the actual transformation of the subject.

The aesthetics of performativity, through its affinity with post-metaphysical philosophy, detached from a strong ontology and directed towards what is unique, disposable, specific, seems to reveal an exceptional potential of inspiration for a radically hermeneutical 'weak' pedagogy of religion. By means of an arranged performativity, focused on themes of religious tradition, the space of religious experience can be explored much more fruitfully than in the case of traditional religious rituals or even traditional art. The 'weak' pedagogy of religion, lacking the fundamental fear of losing the strong object of faith (according to the hermeneutic, strongly historicised concept of truth, such an object does not exist), will probably be much more audacious than the

³² E. Fischer-Lichte, *The Transformative Power of Performance. A New Aesthetics*, London, New York 2008, p. 17-18.

traditional pedagogy of religion to seek and submit to performative 'events', through which the subject, via the feedback loop, will gain access to new meanings, senses, experiences, values that enrich and expand its own religious reflection and imagination.

CONCLUSIONS

The necessity of self-limitation of the traditional pedagogy of religion, connected with metaphysical thinking and strong ontology, as well as with confessionally defined conditions of orthodoxy, may trigger questions about the possibilities and limits of further development in difficult, post-secular conditions. This pedagogy can be replaced by a project inspired by the post-metaphysical thought of the Italian philosopher Gianni Vattimo – a 'weak' pedagogy of religion with its key concept of *kenosis* and the idea of the productivity of interpretation. Weak ontology and radical hermeneutics become a kind of strategy for weakening orthodoxy and thus opening the pedagogy of religion to a heresy that is creative and invigorating for the tradition: to ambiguity, interpretative polyphony of texts, artefacts and religious practices. Thanks to the strategy of *kenosis*, the pedagogy of religion frees itself from the strait-jacket of dogma and can seek inspiration for itself in new borderlands. Besides pedagogy or religion in the broadest sense of the term, art, too becomes its natural space of exploration. All of them focus on the phenomenon of experience, this inner, existential and overwhelming truth for the subject, hence the search for inspiring analogies between aesthetic and religious experience for the pedagogy of religion. Luigi Pareyson's aesthetics of formativity and Erika Fischer-Lichte's aesthetics of performativity are interesting examples of progression on the way from orthodoxy to heresy. The former focuses on the problem of understanding in the aesthetic experience, the latter refers only to the event in which the subject experiences a change, and the reflection takes place after the meanings originally attributed to this event have been deconstructed. Thus, the trajectory of transition from orthodoxy to heresy outlined in the study, in which hermeneutical 'weak thought' would be the driving source, is a scaffolding for the project of 'weak'

pedagogy of religion, a project to which I intend to devote attention in my subsequent studies.

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DIMENSIONS OF RELIGIOUS FUNDAMENTALISM IN THEORETICAL PERSPECTIVE¹

ABSTRACT:

The study contains an overview of selected research positions that make up the theory of religious fundamentalism: religious studies researchers, sociologists, political scientists and philosophers, representatives of Western and Polish academic centres. The author sees as assets the differences and divergences between their positions. This gives us a multifold, deepened and advanced understanding of the phenomenon, as well as an insight into which dimensions of this phenomenon is discussed and negotiated in the theory of fundamentalism. Such understanding of fundamentalism can be useful for the pedagogy of religion and general pedagogy, as referred to in the study's conclusions.

KEYWORDS:

religious fundamentalism, ideology, social movements, theory of fundamentalism

Researchers link the emergence of fundamentalism with the theological reaction dating back to the end of the 19th century to modernist

¹ Originally published: Rafał Włodarczyk, "Wymiary fundamentalizmu religijnego w perspektywie teoretycznej", [in:] *Między ekskluzją a inkluzją w edukacji religijnej*, ed. M. Humeniuk, I. Paszenda, Instytut Pedagogiki Uniwersytetu Wrocławskiego, Wrocław 2017, p. 15-36.

tendencies in Christianity of some US Protestants, mainly Presbyterians, Baptists and Methodists, which over time took the form of a religious movement². The term was originally used in the title of a series of 12 brochures with essays by over sixty authors, published in the United States between 1910 and 1915: *The Fundamentals. A Testimony to the Truth*. Five years later it was taken over by Curtis L. Laws at a meeting of the Northern Baptist Convention to name believers willing “to do battle royal for the fundamentals of the faith”³. It was also used in the name of the World’s Christian Fundamentals Association, established in 1919, which was to gather believers of a number of denominations dedicated to the cause. Over time, the term has expanded, as indicated by the term religious fundamentalism, and like the category of ideology or utopia, it has been dominated, especially in journalistic circles, by its valorising, pejorative tinge. Nevertheless, discussions and controversies concerning its proper scope, definition and understanding of the phenomenon are still alive. In the extreme, as Malise Ruthven notes,

Fundamentalism, according to its critics, is just a dirty 14-letter word. It is a term of abuse levelled by liberals and Enlightenment rationalists against any group, religious or otherwise, that dares to challenge the absolutism of the post-Enlightenment outlook. Other scholars argue that fundamentalism is a caricature or mirror-image of the same post-Enlightenment outlook it professes to oppose: by adopting the same rational style of argument used by the secular enemy, fundamentalists repress or bleach out the multifaceted, polysemic ways in which myth and religions appeal to all aspects of the human psyche, not just to the rational mind, with fundamentalists exposing what one anthropologist calls ‘the hubris of reason’s pretence in trying to take over religion’s role’⁴.

² See K. Armstrong, *The Battle for God. Fundamentalism in Judaism, Christianity and Islam*, 2011, p. 135-195; E. Pace, P. Stefani, *Współczesny fundamentalizm religijny*, Kraków 2002, p. 31-55; G. Kepel, *The Revenge of God. The Resurgence of Islam, Christianity and Judaism in the Modern World*, University Park 1994, p. 100-139; D. Motak, *Nowoczesność i fundamentalizm. Ruchy antymodernistyczne w chrześcijaństwie*, Kraków 2002, p. 67-119; “Fundamentalizm”, [in:] K. Dziubka, B. Szlachta, L. M. Nijakowski, *Idee i ideologie we współczesnym świecie*, Warszawa 2008, p. 89-92.

³ After: K. Armstrong, *The Battle for God*, op. cit., p. 171.

⁴ M. Ruthven, *Fundamentalism. A Very Short Introduction*, Oxford, New York 2007, p. 5.

However, far more interesting are those positions in the relevant literature which focus on testing the ways of theoretical reflection on this phenomenon, separating it from other social phenomena and arriving at its operational and broad definition.

According to Dominika Motak, the author of *Nowoczesność i fundamentalizm. Ruchy antymodernistyczne w chrześcijaństwie*, who opposes the manifold abuses of the term, "Its usefulness for the religious sciences could increase once it is cleared of its negative and polemical connotations. To this end, it would be necessary to limit the scope of its application to phenomena of exclusively or primarily religious character and, as it were, to 'withdraw' it from the field of political science"⁵. The religious scholar assumes that the term describes

religious movements of protest and opposition to the cultural foundations of modernization processes, critical of modern theological currents and the transformation of religious institutions and aimed at defending and restoring traditional dogmatic foundations and forms of faith. As a rule, these movements take action to abolish the autonomy of the secular and religious spheres and to give religion a dominant position in societies⁶.

According to Motak, such organisations highlight the decay of the modern world, evoking apocalyptic images of imminent events. Their members demonstrate "elitist self-awareness and the conviction that they cultivate the only proper form of religiosity", and show

dogmatism, authoritarianism, moralism, proselytism, anti-ecumenism, soteriological exclusivism and axiological dualism, emphasising the radical antagonism between the forces of Good and Evil, which is expressed at the level of religious imagination (satanology, etc.) and in the polarisation of the social world (the construction of icons of the enemy, arousing a sense of threat, and their demonisation)⁷.

⁵ D. Motak, *Nowoczesność i fundamentalizm*, op. cit., p. 13.

⁶ Ibidem, p. 63.

⁷ Ibidem, p. 63-64. Motak's study provides an overview and classification of selected definitions of fundamentalism (see ibidem, 41-50).

In principle, according to the researcher, the term should be applied to certain forms of Protestantism and Catholicism, while its application to

re-Islamisation movements is unfortunate, as they rather meet the characteristics of nativism. For the ideology of Islamism arose in a postcolonial situation as a reaction to a clash of cultures, and not in the environment of developed modernity by virtue of its internal dynamics⁸.

In other words, Motak links fundamentalism to modernity and its impact in the western world and a reaction of traditional religious communities to its disenchantment, pluralisation and secularisation⁹. Therefore the author does not see the use of this category outside this area, which is not tantamount to saying that it applies solely to the aforementioned Christian denominations.

However, the current interest in the issue of fundamentalism seems to be motivated more by research into radical movements within the Islamic world than by the fate of Moral Majority and Opus Dei and the sense of threat posed by acts of terror¹⁰. This shift in meaning is already

⁸ Ibidem, p. 64-65.

⁹ See ibidem, p. 19-36. A similar conclusion can be found in Karen Armstrong's book on fundamentalism. She observes in the "Introduction": "The West has developed an entirely unprecedented and wholly different type of civilization, so the religious response to it has been unique" (K. Armstrong, *The Battle for God*, op. cit., p. xiii). The difficulty of maintaining narrowly drawn boundaries can be seen in the scope of Armstrong's research: "The movements I have chosen are American Protestant fundamentalism, Jewish fundamentalism in Israel, and Muslim fundamentalism in Egypt, which is a Sunni country, and Iran, which is Shii" (Ibidem). In her book the scholar does not address the questions of Catholic fundamentalism.

¹⁰ See e.g. G. Kepel, *The Revenge of God*, op. cit., p. 1-12; E. Gellner, "Religious Fundamentalism", [in:] E. Gellner, *Postmodernism, Reason and Religion*, London, New York 1992, p. 2-22; A. Giddens, "Religious Fundamentalism", [in:] A. Giddens, *Sociology*, Cambridge, Malden 2009, p. 709-716; M. Szulakiewicz, Z. Karpus, "Od redaktorów", [in:] *Fundamentalizm i kultury*, ed. M. Szulakiewicz, Z. Karpus, Toruń 2005, p. 9-10. A renaissance of researchers' interest in religious fundamentalism dates back to the late 1980s and early 1990s. Of particular importance in its dynamics and orientation was the Iranian revolution, as a result of which a respected member of the Shi'ite 'clergy', Khomeini, took power in that country and transformed Iran into an Islamic republic. This event should, of course, be seen in the much broader context of an Islamic revival (see E. Pace, P. Stefani, *Współczesny fundamentalizm religijny*, op. cit., p. 57-93; B. Tibi, *Fundamentalizm religijny*, Warszawa 1997, p. 33-98; G. Kepel, *The Revenge of God*, op. cit., p. 13-46). The settlement and

so pronounced in the 1990s that Bassam Tibi, a political scientist known for his research and ideas on the condition of contemporary Muslim communities in the Western world, decides to write *Der Religiöse Fundamentalismus im Übergang zum 21. Jahrhundert*; he was motivated, among other things, by opposition to the identification of this phenomenon with Islam¹¹. Tibi's text is rooted in the sweeping international and interdisciplinary research project of the American Academy of Arts and Sciences. Launched in the late 1980s, it produced within a short time five voluminous books of articles edited by Martin E. Marty and R. Scott Appleby, showing different examples and aspects of religious fundamentalisms¹². In the concluding chapter of the first volume of the series, published in 1991, its editors point to the validity of adopting a broad definition that makes it possible to identify the phenomenon in Catholicism, Islam, Judaism, Confucianism, Sikhism, Hinduism, etc. In their view, it appears as

a tendency, a habit of mind, found within religious communities and paradigmatically embodied in certain representative individuals and movements, which manifests itself as a strategy, or set of strategies, by which beleaguered believers attempt to preserve their distinctive identity as a people or groups. Feeling this identity to be at risk in the contemporary era, they fortify it by selective retrieval of doctrines, beliefs, and practices from a sacred past¹³.

According to Grace Davie, a British sociologist of religion, the *Fundamentalism Project* corresponds to what Marty discussed on another

activity in Israel of ultra-Orthodox Jewish groups and organizations after World War II also contributed to the shifting of the meaning of the term (see K. Armstrong, *The Battle for God*, op. cit., p. 199-211; 255-366; E. Pace, P. Stefani, *Współczesny fundamentalizm religijny*, op. cit., p. 95-112; G. Kepel, *The Revenge of God*, op. cit., p. 140-190).

¹¹ See B. Tibi, *Fundamentalizm religijny*, op. cit., p. 17, 19, 25, 27.

¹² Published in succession were: *Fundamentalisms Observed* (1991), *Fundamentalisms and Society: Reclaiming the Sciences, the Family, and Education* (1993), *Fundamentalisms and the State: Remaking Politics, Economies, and Militance* (1993), *Accounting for Fundamentalisms: The Dynamic Character of Movements* (1994), *Fundamentalisms Comprehended* (1995). The volumes edited by Marty and Appleby were published by the University of Chicago Press. The seminar articles and materials collected there have become one of the main reference points and sources of knowledge on religious fundamentalism.

¹³ M. E. Marty, R. S. Appleby, "Conclusion. An Interim Report on a Hypothetical Family", [in:] *Fundamentalisms Observed*, ed. M. E. Marty, R. S. Appleby, Chicago 1991, p. 835.

occasion as an ideal type of a phenomenon or rather a set of characteristics determining possible family resemblance between its variants¹⁴. That is to say, the set of features established by the researcher is never fully represented, while their various incomplete configurations can be observed in the analysed cases of movements, which makes it possible to indicate the convergence between them which distinguishes them from other phenomena.

In Marty's view it may be assumed that the majority of such movements grow out of the stable and isolated development of traditional cultures as a reaction against a threat that disturbs the state of equilibrium, which is directed by their leaders to innovate, defend, seek resistance or retaliate. According to the American scholar of religion, these movements are characterised by a selective recourse to the resources of the past, which helps them to base their activities on an unequivocally understood authority, and by the creation of an oppositional, separative 'us versus them' mentality. As Marty observes,

Fundamentalists resent being left out, deprived, displaced, scorned, marginalized. They feel their cultures penetrated. They must take action against the infidel. There is almost always a polity implication, whether constitutional, revolutionary, or designed to stabilize a hegemony of fundamentalists¹⁵.

Noteworthy here is also the evaluation of one's current activities from such a time perspective when all the assumed pursuits are finally achieved. This is part of a unique temporal order, which offers the movement followers motivation and orientation points: "The future is assured, the past was grand, the present may be cloudy¹⁶.

Furthermore, in another article published four years earlier, Marty pointed out such characteristics of fundamentalists¹⁷, as a tendency

¹⁴ See G. Davie, "Demanding Attention. Fundamentalisms in the Modern World", [in:] G. Davie, *The Sociology of Religion*, Los Angeles, Singapore 2007, p. 184-186; M. E. Marty, "The Fundamentals of Fundamentalism", [in:] *Fundamentalism in a Comparative Perspective*, ed. L. Kaplan, Amherst, Massachusetts 1992, p. 18-23; M. E. Marty, "Fundamentalism as a Social Phenomenon", *Bulletin of the American Academy of Arts and Sciences* 1988, no. 42, p. 17-23. See also: M. Ruthven, *Fundamentalism*, op. cit., p. 6-7, 22.

¹⁵ M. E. Marty, "The Fundamentals of Fundamentalism", op. cit., p. 22.

¹⁶ Ibidem.

¹⁷ See M. E. Marty, "Fundamentalism as a Social Phenomenon", op. cit., p. 17-23.

towards absolutism, anti-hermeneutism, or a focus on action and effectiveness. In his view, fundamentalists are not, as another respected scholar of the issue, Gilles Kepel, also emphasises, representatives of only one, chosen social stratum or class, and their involvement is not the result of impoverishment, lack of education or deviant needs¹⁸. They remain hostile to relativism, pluralism and ambiguity, ally themselves only rarely and briefly with movements of the same kind within other religions, and clearly distinguish themselves from currents of orthodoxy, conservative or traditionalist factions within their own religion¹⁹. According to the researcher, these movements display an ambivalent attitude towards modernity. Being themselves the result of a clash with it, they oppose its manifestations, assumptions and tendencies, with the exception of the achievements of civilization, which they try to use in an optimal way to achieve their own goals. Fundamentalists, Marty notes, “are seldom opposed to technology as such, or to many of its specific artifacts. Technology, one might say, helped make fundamentalism possible”²⁰.

Unlike Marty or Kepel, Steve Bruce, whose opinion about the phenomenon corresponds in many respects to the theoretical framework of the *Fundamentalism Project*, believes that such movements appeal to specific social strata, i.e. marginalized groups²¹. The British sociologist of religion credits fundamentalism with being equally broad in scope, but also more clearly emphasises the radical nature of its manifestations. He argues:

¹⁸ See ibidem, p. 20; G. Kepel, *The Revenge of God*, op. cit., p. 4.

¹⁹ Analysts of the phenomenon draw attention to the separateness of these currents, particularly the differences between fundamentalism and traditionalism and orthodoxy (see np. M. Marczevska-Rytko, “Fundamentalizm religijny: dylematy terminologiczno-metodologiczne”, [in:] *Fundamentalizm i kultury*, op. cit., p. 45-59; D. Motak, *Nowoczesność i fundamentalizm*, op. cit., p. 50-63). Armstrong, in turn, believes that it is inner tension within a religious community that contribute to the emergence of such a radical variant. “Fundamentalism - whether Jewish, Christian, or Muslim - rarely arises as a battle with an external enemy [...]; it usually begins, instead, as an internal struggle in which traditionalists fight their own coreligionists who, they believe, are making too many concessions to the secular world” (K. Armstrong, *The Battle for God*, op. cit., p. 108).

²⁰ M. E. Marty, “Fundamentalism as a Social Phenomenon”, op. cit., p. 18.

²¹ See S. Bruce, *Fundamentalism*, Polity Press, Cambridge, Malden 2008, p. 14. Importantly, Bruce too took part in seminars held as of 1988 within the *Chicago Fundamentalism Project*.

We might expect fanaticism to be common in Christianity, Islam and Judaism, where there is a single god, rather than in religions such as Hinduism and Buddhism, where the variety of gods (or the varieties of forms that the divine can take) should create a climate of tolerance. [...] Nonetheless, there are aggressive Hindu and Buddhist movements that have been described as fundamentalist²².

According to Bruce, the important differences should not be glossed over, but instead we should indicate the reasons “why some religions are more likely to produce fundamentalist movements than others”²³. Such movements attract attention mostly via their “desire to reshape the world at large, and that often involves violence”²⁴.

Like Motak, Bruce pays equally much attention to a list of processes and changes that occurred in modernity and which are now the principal point of reference for the emergence of religious fundamentalist movements²⁵. He points to the fragmentation of social space, which increases people’s isolation from each other, the breakdown of everyday life into separate, secularised spheres guided by their own specific logic, with their increasingly far-reaching specialisation of institutions and complex division of labour, intensified by the incremental acceleration of change. According to the researcher, the rationalisation and development of science and technology under modernism have the effect

²² Ibidem, p. 5. Moreover, according to Bruce “fundamentalism may derive its character not just from arguments within some body of believers about what God requires but also from largely secular nationalist struggles” (Ibidem, p. 8).

²³ Ibidem, p. 96. Examining the difference between religions as for the potential to stir fundamentalist movements, Bruce indicates monotheism and dogmatism as its pre-conditions (see ibidem, p. 97-101). Hence, contrary to earlier declarations about the scope of the concept, he is inclined to recognise that, alongside Protestantism and Islam, other such movements only resemble fundamentalism to a certain extent, but in their respective cultures they have never been so powerful and have not gained comparable influence.

²⁴ Ibidem, p. 7. In the context of the question of the relationship between fundamentalism and violence, it is worth confronting Bruce’s position with Kepel’s observation: “There is one fundamental difference between the movements of re-Christianisation ‘from above’ and the Islamist or Gush Emunim: the former have never had recourse to political violence – either in Western Europe and the United States, or under the communist regimes which persecuted them” (G. Kepel, *The Revenge of God*, op. cit., p. 196).

²⁵ See S. Bruce, *Fundamentalism*, op. cit., p. 15-39. See also: D. Motak, *Nowoczesność i fundamentalizm*, op. cit., p. 19-36; G. Davie, *The Sociology of Religion*, op. cit., p. 46-66, 89-110.

of weakening the tendency of the faithful to trust in traditional forms of knowledge, just as the advances of egalitarianism and individualism motivated by the Enlightenment lead to the corrosion of the hierarchical structures of religious organisations, the decomposition of their communal character focused on the primacy of the collective over the individual, and the disintegration of the patriarchal model of family and interpersonal relations.

Bruce notes the fundamentalists' negative perception of last century's characteristic involvement of Western Christian churches and their members in the modernisation of society and in making compromises with the secular state. Nevertheless, according to the sociologist, the scope of the phenomenon is not limited by history. He argues that "In the broad sweep of human history, fundamentalists are normal", "a rational response of traditionally religious peoples to social, political and economic changes that downgrade and constrain the role of religion in the public world"²⁶.

Discussing the theoretical profile of the *Fundamentalism Project*, Davie points to the particular value of the work of yet another scholar involved in its implementation who, like Marty and Bruce, prefers to operate with a broader concept. Shmuel N. Eisenstadt, writes Davie, "places the study of fundamentalism in a long-term historical perspective. Modern fundamentalisms are preceded by proto fundamentalist movements which themselves arose in the 'Axial Civilizations' of pre-modern times"²⁷. The 'Axial Age' category was borrowed by the Israeli sociologist from the classic of continental philosophy, Karl Jaspers. It is

²⁶ S. Bruce, *Fundamentalism*, op. cit., p. 120. Seeing the issue in a broad time perspective is expressed by Bruce at the very beginning of the study. He declares there: "This book is about the modern zealots" (Ibidem, p. 2), the figure of the zealots (from Greek: *zelotes*, Hebrew: *kanai*), staunch members of a religious-political group active, according to Josephus Flavius, in first-century Palestine and striving by means of terror to liberate the Jewish people from Roman rule, is a significant reference point in discussions of contemporary fundamentalism.

²⁷ G. Davie, "Demanding Attention", op. cit., p. 189. See S. N. Eisenstadt, "Heterodoxies, Sectarianism, and Utopianism in the Constitution of Proto-fundamentalist Movements", [in:] S. N. Eisenstadt, *Fundamentalism, Sectarianism, and Revolution. The Jacobin Dimension of Modernity*, Cambridge 1999, p. 1-38; S. N. Eisenstadt, "Multiple Modernities in an Age of Globalization" and "The Jacobin Component of Fundamentalist Movements", [in:] S. N. Eisenstadt, *Comparative Civilizations and Multiple Modernities*, Part II, Leiden, Boston 2003, p. 519-533, 937-951.

the period of the first millennium B.C.E., when there emerged and became institutionalized in some of the major civilizations – namely in Ancient Israel, later on in Christianity; in Ancient Greece; China in the early Imperial period; Hinduism and Buddhism, and last of all and later on in Islam – a conception of a basic tension between the transcendental and the mundane orders – a conception which differed greatly from that of a close parallelism between these two orders or their mutual embedment which was prevalent in so-called pagan religions, in those very societies and religions from which these post-Axial Age civilizations emerged²⁸.

The most crucial change of this period, according to Eisenstadt, is the constitution of ‘cultural’ or ‘religious’ collectives, as opposed to the previously dominant ethnic ones or those built on the subordination of a given collective to strong centres of sovereign power, a change that gave rise to a politics practiced with and in relation to ideology, and thus also created space for the emergence of proto-fundamentalist movements²⁹. Rooted in utopian heresies, they sought, in reaction to the decay of religion, to renew it, to restore its authentic version and to rebuild the existing social order according to a clear organisational pattern, while placing emphasis in their activities on the construction of their own clear symbolic and institutional boundaries. Other characteristic features common to proto- and fundamentalist movements, according to Eisenstadt, are a refusal to interpret and oppose innovations of tradition while using it selectively, a low threshold of tolerance for ambiguity and opposition to the attitudes of the current religious establishment; in this sense they are also anti-traditionalist and anti-orthodox.

²⁸ S. N. Eisenstadt, “Cultural Traditions and Political Dynamics: The Origins and Modes of Ideological Politics”, [in:] S. N. Eisenstadt, *Comparative Civilizations and Multiple Modernities*, Part I, Leiden, Boston 2003, p. 221. See S. E. Eisenstadt, “Heterodoxies, Sectarianism, and Utopianism in the Constitution of Proto-fundamentalist Movements”, op. cit., p. 3-6.

²⁹ See S. N. Eisenstadt, “Cultural Traditions and Political Dynamics”, op. cit., p. 219-247; S. N. Eisenstadt, “The Jacobin Component of Fundamentalist Movements”, op. cit., p. 938-944; S. N. Eisenstadt, “Heterodoxies, Sectarianism, and Utopianism in the Constitution of Proto-fundamentalist Movements”, op. cit., p. 25-38. Armstrong, too, considers present-day fundamentalism in a longer time perspective, by pointing out the importance of the period from 700 to 200 BC and by describing in more detail the situation of the three religions in the context of the formation of modernity (see K. Armstrong, *The Battle for God*, op. cit., p. xiv-xvi, 3-130).

The context of modernity changes the meaning of the set of features indicated by the sociologist that tie the activities of the analysed sects, and with it the potential of fundamentalisms is significantly transformed. They have become clearly anti-modern, or more precisely anti-Enlightenment. Nevertheless they are distinguished by what Eisenstadt considers a decisive factor: a strong Jacobin component inherent in the totalitarian components of the political programme of modernity. According to his findings, "Jacobin orientations emphasize the belief in the primacy of politics and of the ability of politics to reconstitute society according to a totalistic vision and through highly mobilized political action"³⁰. They share such features as

a desire to create a new social order by political action originating in revolutionary universalist, ideological beliefs, usually beyond all national and ethnic units, based on primordial ties, and beyond new socio-political communities. They moreover see politicians as great transformers of societies³¹.

In other words, the modern state, modernist in its assumptions, possesses a number of instruments attractive to fundamentalists in terms of potentially total impact on the reality of all human relations. Their 'utopian-sectarian critique of modernity', their compactness, their discipline, their conviction that they are right and that they have the right model for the organisation of communal life, make these movements feel predisposed in almost every case to use these tools immediately with the intention of carrying out radical transformations of the public and private orders. Furthermore, Eisenstadt sees that "some very interesting parallels emerge between fundamentalists and the secular Jacobin

³⁰ S. N. Eisenstadt, "The Jacobin Component of Fundamentalist Movements", op. cit., p. 940.

³¹ S. N. Eisenstadt, *Utopia i nowoczesność. Porównawcza analiza cywilizacji*, Warszawa 2009, p. 575-576. See S. E. Eisenstadt, "Fundamentalism as a Modern Jacobin Anti-modern Utopia and Heterodoxy – the Totalistic Reconstruction of Tradition", [in:] S. E. Eisenstadt, *Fundamentalism, Sectarianism, and Revolution*, op. cit., p. 94-97. It is also worth noting in this context Kepel's remark arising from his analysis: "Thus, despite their similarities, the re-Islamization, re-Judaization and re-Christianization movements 'from above' differ significantly in their attitudes to the state, the law and the constraint of democracy, and these differences have their origin in their respective religious doctrines" (G. Kepel, *The Revenge of God*, op. cit., p. 198).

totalitarian regimes of the left”³², which should be taken seriously, even though the latter have, according to the researcher, a different approach to Enlightenment. At the same time, he narrows the scope of the concept in another dimension, pointing out that contemporary movements present in large numbers in Hinduism or Buddhism only resemble fundamentalisms. Their orientations are mainly particularistic in nature, which links them to fascist movements, and therefore do not give rise to strong Jacobin aspirations³³.

Eisenstadt’s observation of the far-reaching similarities and convergences between the various types of political movements of modernity, as well as his indication of the constant presence of radical ideological politics in the axial civilizations, raises the question of whether contemporary religious fundamentalism is not a glaring example of a much broader phenomenon? The popularisation of the term in the form of this very pair of words, the convention of specifying which type of fundamentalism is meant, seems to confirm the intuition of an Israeli researcher, which is clearly expressed in the early 1990s by Andrew Heywood. According to the British political scientist, “Fundamentalism is a style of thought in which certain principles are recognized as essential ‘truths’ that have unchallengeable and overriding authority, regardless of their content. Substantive fundamentalisms therefore have little or nothing in common, except that their supporters tend to evince an earnestness or fervour born out of doctrinal certainty”. According to this scholar,

Although it is usually associated with religion and the literal truth of sacred texts, fundamentalism can also be found in political creeds. Even liberal scepticism can be said to incorporate the fundamental belief that all theories should be doubted (apart from its own). Although the term is often used pejoratively to imply inflexibility, dogmatism and authoritarianism, fundamentalism may also give expression to selflessness and a devotion to principle³⁴.

³² S. N. Eisenstadt, “The Jacobin Component of Fundamentalist Movements”, op. cit., p. 944. See S. E. Eisenstadt, “Fundamentalism as a Modern Jacobin Anti-modern Utopia and Heterodoxy – the Totalistic Reconstruction of Tradition”, op. cit., p. 106-112.

³³ See S. N. Eisenstadt, *Utopia i nowoczesność*, op. cit., p. 513, 522-523, 579-580; S. E. Eisenstadt, “Fundamentalism as a Modern Jacobin Anti-modern Utopia and Heterodoxy – the Totalistic Reconstruction of Tradition”, op. cit., p. 113-114.

³⁴ A. Heywood, “Religious Fundamentalism”, [in:] A. Heywood, *Political Ideologies. An Introduction*, Basingstoke, New York 2014, p. 289. Andrzej Szahaj follows suit: “No traditionally

Like many other researchers of the phenomenon, Heywood focuses on religious fundamentalism in his study and recognises that its emergence occurs in societies in a profound crisis. He mentions secularisation, postcolonialism and globalisation among the factors that have played a particularly important role in the emergence of the current imbalance. The replacement of traditional religious or spiritual values with materialistic and rationalistic ones, together with the weakened the moral fabric of society, in time triggered a fundamentalist backlash against decadence and hypocrisy. The identity crisis of the indigenous cultures previously oppressed by colonial rule, for which regaining independence did not bring social emancipation, a sense of cohesion and self-esteem, meant that the most violent manifestations of fundamentalism can now be observed precisely in developing countries. On the other hand, the ever-increasing interdependence and mobility in the world has undermined the autonomy and ability of individual societies to create stable and secure political identities, to which ethnic and religious mobilisation is a reaction. Heywood points to such features of religious fundamentalism³⁵ as: rejecting the separation of politics and religion, public and private and revisionism, advocating objective axio-normative standards and adopting a Manichaeian worldview, offering a secure identity and perspective on order in circumstances of prevailing uncertainty, defining oneself by the division into 'them' and 'us', advocating 'activist' readings of texts, i.e. those that help reduce their complexity and quantity to a theopolitical project, following a charismatic leader, the ability to arouse political commitment and mobilise the faithful, the readiness to use extra-legal means, pointing to simple, practical and absolute solutions, militancy, taking radical or revolutionary action. Moreover, according to the political scientist, religious

separated part of the political and ideological spectrum has a monopoly on fundamentalism. Any idea can be professed in a fundamentalist manner. We can therefore have fundamentalism on the left and on the right" (A. Szahaj, "Co to jest fundamentalizm? Fundamentalizm a paternalizm", [in:] A. Szahaj, *Jednostka czy wspólnota? Spór liberalistów z komunitarystami a „sprawa polska”*, Warszawa 2000, p. 214). See also: A. Pawłowski, "Czym jest fundamentalizm?", [in:] *Fundamentalizm współczesny*, ed. A. Pawłowski, Zielona Góra 1994, p. 7-11; A. Bronk, "'Fundamentalizm': sensy i dziedziny użycia", [in:] *Fundamentalizm i kultury*, op. cit., p. 19-23; J. Sielski, "Fanatyzm i fundamentalizm w polityce", [in:] *Fundamentalizm i kultury*, op. cit., p. 321-328.

³⁵ See A. Heywood, "Religious Fundamentalism", op. cit., p. 284-293.

fundamentalists are selectively traditional and modern, violently anti-modern and enthusiastic about mass communication techniques or the machinery of the modern state.

Fundamentalism read as a response to the influences of globalisation, whose significance for this phenomenon was also noted by Heywood, is not in Edmund Wnuk-Lipiński's opinion its commonly accepted interpretation³⁶. However, acknowledging its validity, the sociologist refers to the view of Anthony Giddens, for whom fundamentalism is clearly a "child of globalisation" and a phenomenon peculiar to the current era, "It is tradition defended in a traditional way – by reference to ritual truth – in a globalising world that ask for reasons"³⁷. Like Heywood, Giddens too, followed by the Polish sociologist, does not see it in religion only. He believes that "Fundamentalism can develop on the soil of traditions of all sorts". What is important in it is not what people believe, but "how the truth of beliefs is defended or asserted [...], why they believe it and how they justify it"³⁸. However, Wnuk-Lipiński finds Giddens' position too general and reaches for the characteristics of the phenomenon proposed by Gabriel A. Almond, Emmanuel Silvan and Appleby in the last volume of the *Fundamentalism Project*³⁹.

In keeping with their findings,⁴⁰ fundamentalists, like orthodox of conservative members of a given religion, attempt to defend tradition against the threat of erosion by secularisation and modernisation, but they do not believe that the measures they have taken are sufficient to preserve it. They do, however, reject the suggestion that they innovated

³⁶ See E. Wnuk-Lipiński, "Fundamentalizm jako reakcja na globalną zmianę", [in:] E. Wnuk-Lipiński, *Świat międzyepoki. Globalizacja, demokracja, państwo narodowe*, Kraków 2004, p. 272-274.

³⁷ A. Giddens, "Tradition", [in:] A. Giddens, *Runaway World. How Globalisation is Reshaping our Lives*, New York 1999, p. 49.

³⁸ Ibidem. See also: Ibidem, p. 48-50; A. Giddens, "Religious Fundamentalism", op. cit., p. 709-710. In another of his works, returning to the issue of the determinants of tradition in a post-traditional society, he similarly states: "We can speak in this sense not only of religious fundamentalism but of fundamentalisms of nationalism, ethnicity, the family and gender – among others" (A. Giddens, "Risk, Trust, Reflexivity", [in:] U. Beck, A. Giddens, S. Lash, *Reflexive Modernization. Politics, Tradition and Aesthetics in the Modern Social Order*, Stanford 1994, p. 190).

³⁹ See E. Wnuk-Lipiński, "Fundamentalizm jako reakcja na globalną zmianę", op. cit., p. 278-280.

⁴⁰ See G. A. Almond, E. Silvan, R. S. Appleby, "Fundamentalism: Genus and Species", [in:] *Fundamentalisms Comprehended*, ed. M. E. Marty, R. S. Appleby, Chicago 1995, p. 399-424.

significantly by their actions and choices, pointing to the essential link between their programme and teaching and the authoritative foundations of tradition, cleansed of the thicket of deviations. In a broader perspective, the fundamentalism of the second half of the 20th century is, according to Almond, Silvan and Appleby, a counter-attack by a religion, on the defensive during the century of industrial revolution, on the triumph of a secular 'culture of progress', and a reaction to the weaknesses of the modernisation process (social costs, environmental devastation, moral decay and other side-effects).

Of course, in the Western world and its colonies, the impact of modernity was not the same and produced different outcomes. These differences can be seen in the different fundamentalist formations. Similarly, according to researchers, there are differences between the Buddhist, Sikh and Hindu fundamentalist movements and those of Protestants, Catholics, Sunnis, Shiites and Judaists, linked by elements such as monotheism, messianism and the sacralisation and codification of doctrine and law. Moreover, in seeking to identify the characteristics common to the many variants of such movements, it is necessary to take account of the differences arising from the specific cultural background of the region in which they occur.

Despite the indicated complications and ambivalences, researchers manage to distinguish nine essential characteristics of fundamentalist movements⁴¹. Scholars point to a militant opposition to secularization and modernization, leading to the erosion of community and the marginalization of religion as well as to moral Manichaeism, which makes a clear distinction between the contaminated world outside the movement and the ideal purity maintained within it. They moreover mention a selective approach both to the resources of tradition (emphasising especially those elements and aspects of it that clearly distinguish them from the mainstream) and to the manifestations and achievements of modernity (some of which are accepted, such as advanced technologies or social media, while others are firmly rejected), as well as to the consequences and processes of modernity, which clearly distinguish them from the mainstream. Moreover, there is hermeneutics inspired by secular philosophies and historical criticism is contrasted with the

⁴¹ See *ibidem*, p. 405-408.

strategies of correct, error-free readings that enable them to maintain their conviction in the infallibility of the recognised solutions and the absolutist character of the texts or traditions they hold sacred.

Another feature, also of an ideological nature, is, according to a group of scholars, the adoption by a given movement of some kind of messianic or millenarian aspect, a vision of a time of triumph of goodness, justice, morality, faith, the culmination of history ending the history of suffering and waiting, the final liberation of the world from evil and wickedness. The other four characteristics identified by Almond, Sivan and Appleby relate, in their view, to the organisational aspects of the fundamentalist movement. It is distinguished by the manner in which members are recruited, emphasising vocation, a sense of uniqueness, choice and commitment, by the strategy of drawing sharp physical and visual, linguistic boundaries between the world of the survivors and the lost remnant, by the methodical designation and elaboration of appropriate spheres of activity, appropriate behaviour and conduct, and by an authoritarian structure, an internal division into equal representatives of a voluntary movement voluntarily subordinating themselves to a charismatic leader who has no official powers of authority, but who enjoys trust among those disciplined to embody his decisions and the authority of a correct interpreter of sacred texts or traditions.

According to Wnuk-Lipiński, for the fundamentalist who drifts in a world of illusion, the present is a threat, because he does not recognise the absolute truth of which a given movement is a depository, and his expectation of its triumph in the future differs from the traditionalist, who places the 'golden age' in times gone by⁴². Although each of such movements absolutises its own truth and its own recognitions of the risks, which, according to the sociologist, rules out alliances between them, four common enemies can be identified: an illegitimate religious establishment, a secular state, a secular civil society and countries belonging to the core of globalisation, such as the United States⁴³. This clearly reactionary, defensive character of fundamentalisms is the starting point for several types of explanations of the formation of the phenomenon, focused on indicating the fundamental factor determining

⁴² See E. Wnuk-Lipiński, "Fundamentalizm jako reakcja na globalną zmianę", *op. cit.*, p. 274.

⁴³ See *ibidem*, p. 280–281.

their emergence, but in the eyes of Wnuk-Lipiński interpretations are always inadequate⁴⁴.

The economic hypothesis, which holds that fundamentalism is a strategy of defence against exclusion and marginalisation, as it promises greater equality and lowers consumption aspirations, thus relieving some of the frustrations and tensions, is deemed to be more of an explanation for the dynamics and success of populist movements. Similarly, he finds only partially plausible the hypothesis he calls cultural and civilisational, which assumes an inferiority complex towards Western societies as the cause of the reaction, as the fundamentalists' defence against westernization contains many of its components. The strong disruption of the sense of security associated with the processes of globalisation as a result of rapid changes in culture and society, the answer to which would be a return to a familiar world, which is at the heart of the modernisation hypothesis, does not quite correspond to the circumstances of fundamentalist movements in states where modernity has long been their contributor. Furthermore, the communitarian hypothesis, according to which fundamentalists in urban agglomerations create strongly integrated local communities by means of the bond of religion as a way of eliminating the phenomenon of social uprooting, does not explain their expansion, use of violence or resort to terrorist actions, either.

In order to explain the reasons for the emergence of such movements, Wnuk-Lipiński believes yet another hypothesis is in order, a sociopsychological one, focusing on the phenomenon of 'fundamentalist conversion' motivated by an identity crisis, "i.e. a relatively deep transformation, or rather a re-evaluation of an individual's perception of social reality, the mechanisms that govern it, as well as the criteria of its evaluation"⁴⁵. According to the sociologist, this crisis is closely linked to the impact on local contexts of three processes characteristic of globalisation: fragmentation of social reality, detraditionalization and relativization of norms, values and ways of life. The above produce a sense of chaos, unpredictability and arbitrariness, which for many exceeds the limits of their tolerance⁴⁶. Ultimately, according to this researcher, it

⁴⁴ See *ibidem*, p. 286-292.

⁴⁵ *Ibidem*, p. 292.

⁴⁶ Jerzy Sielski, referring to the five hypotheses distinguished by Wnuk-Lipiński, also sees the necessity of supplementing them. He adds two more: an ethnic (national) one,

should be assumed that fundamentalist movements appear most often in the space of civil society, despite the fact that they themselves are anti-democratic and exert organised pressure against the nation-state. Moreover, their common denominator is reference to a selected set of religious or secular values, constituting the 'absolute truth'. It helps to reduce the negative effects of the identity crisis and, thanks to the accepted founding dogmas, to create a new identity of its members, drawing a clear dichotomy of 'us' versus 'them'⁴⁷.

The approach of Wnuk-Lipinski or Giddens and Heywood's view that "All ideologies, however, contain elements of fundamentalism"⁴⁸, seem to converge with the opinions of Davie, who indicated the currently unique position of "the secular certainties, the former competitors of religious truth" and their equal status. A British sociologist of religion has noted that in postmodernity,

those ideologies which have threatened (and to some extent continue to threaten) the traditional certainties of a whole range of religious groups, become, at least potentially, the victims rather than the perpetrators of economic and cultural change. No longer are they seen as the confident alternatives, but become instead - like the religious certainties they once sought to undermine - the threatened tradition, themselves requiring justification and, at times, aggressive rehabilitation⁴⁹.

To illustrate her observation on secular ideologies in their fundamentalist variant, she uses the examples of situations following the collapse of the Eastern Bloc and the collapse of the Marxist worldview in the Soviet Union or the Balkans, as well as radical factions of the animal rights movement or feminist movement factions. According to Davie,

according to which fundamentalism is a reaction to the pacifying actions of the state against the separatist aspirations of ethnic and national minorities stimulated by its weakness, and a political one, indicating that it is a reaction of some political elites to the activism of the opposition motivated by failures such as the economic crisis, wanting to solve the problem of dissent in a decisive manner (see J. Sielski, "Fanatyzm i fundamentalizm w polityce", op. cit., p. 326-328).

⁴⁷ See E. Wnuk-Lipiński, "Fundamentalizm jako reakcja na globalną zmianę", op. cit., p. 300-301.

⁴⁸ A. Heywood, "Religious Fundamentalism", op. cit., p. 287.

⁴⁹ G. Davie, "Demanding Attention", op. cit., p. 196. See also A. Pawłowski, "Czym jest fundamentalizm?", op. cit., p. 9-10; M. Ruthven, *Fundamentalism*, op. cit., p. 21-22.

it should be assumed that “religious movements are not the only ones that succumb to fundamentalist tendencies”⁵⁰, and the rivalry between them should be seen as normal rather than a peculiar feature of the social landscape of late modernity.

CONCLUSIONS

From the positive self-definition of the supra-denominational religious movement of the Protestant denominations in the first decades of the 20th c. to the contemporary approaches, one can observe interesting proposals of shifting understandings of particular dimensions of the phenomenon of fundamentalism.

Motak points to the late 1970s and early 1980s as a time when, under the influence of numerous independent events such as the Iranian revolution, the revival of the re-Islamisation movements or the involvement of the Moral Majority in Ronald Reagan’s presidential campaign, “the scope of the concept was extended to include a number of religious phenomena of an anti-modern character”⁵¹ and became a category of sociological research, acquiring a negative significance in popular parlance. The following decade, which is reflected in the discussion in this study, brings efforts to consolidate this change on the one hand, and preparations for a new addition on the other. The inclusion of movements within both Islam and Buddhism in the category we are

⁵⁰ G. Davie, “Demanding Attention”, op. cit., p. 199.

⁵¹ D. Motak, *Nowoczesność i fundamentalizm*, op. cit., p. 39. In the context of the study of the scope of meaning, the religious scholar also draws attention to the emergence of the term in the field of philosophy in the 1960s (see ibidem, p. 38–39). According to Andrzej Bronk, it refers to the discussion conducted in Anglo-Saxon epistemology and German methodology (see A. Bronk, “Fundamentalizm: sensy i dziedziny użycia”, op. cit., p. 20–21, 28–30). According to him, “The best-known contemporary form of philosophical fundamentalism is epistemological fundamentalism, which conceives of knowledge as a deductively ordered structure based on definite and final elements. [...] epistemological foundationalism aims to refute scepticism and to positively reconstruct the edifice of knowledge” (ibidem, p. 29). However, this usage is rarely connected with the phenomenon of fundamentalist movements, perhaps due to the fact that the indicated cases in English and German are expressed by different sounding names: *foudationalism* and *Fundamentalphilosophie*. Also Polish philosophers and authors of translations are not consistent here and often use other terms, such as: *fundacjonizm*, *fundacjonizm*, *fundamentyzm*.

interested in here is accompanied by an awareness of the significant difference in dynamics between fundamentalisms born on the basis of two different types of confessions, which is reflected in the observation shared by some scholars that “

Although all religions have spawned fundamentalist or fundamentalist-type movements, certain religions may be more prone than others to fundamentalist developments, or place fewer obstacles in the way of emerging fundamentalism. In this respect,

Heywood continues,

Islam and Protestant Christianity have been seen as most likely to throw up fundamentalist movements, as both are based on a single sacred text and hold that believers have direct access to spiritual wisdom, rather than this being concentrated in the hands of accredited representatives⁵².

Another characteristic that would assign a religious movement to one of the two types is its reliance on monotheistic traditions. On the other hand, the conviction that fundamentalism can develop on the basis of any ideology, although presumably not with the same intensity, does not obliterate the division between religious and secular fundamentalism. This division becomes clear when a researcher declares a broad understanding of the concept and, proceeding to explain it, grounds his or her theoretical model on examples of confessional movements, and then, using the characteristics created on this basis points to identical elements present in secular ideologies. Religious fundamentalisms seem not only better described in the literature and more easily observable, they also arouse more interest. Consequently, we get a field of observation divided between two types of religious fundamentalism and one of secular ideologies. Therefore, the negotiations between researchers in this dimension concern the expansion of the scope of the concept of fundamentalism by dismantling two successive borders.

On the other hand, in the historical dimension, the basic caesura is the early 20th century and the crisis of modernity. In this sense,

⁵² A. Heywood, “Religious Fundamentalism”, *op. cit.*, p. 293.

fundamentalism is a typically contemporary phenomenon, for which the context is provided by the diagnosis of social anomie and secularisation on the one hand, and the development of advanced technologies, communications and the mechanics of the state on the other. Nevertheless, this dimension is also negotiable and expandable. For example, Eisenstadt sees in the period of the French Revolution the time of the initiation of faith in the possibility of a comprehensive reconstruction of the social order by means of political action, a context which, in his view, creates the conditions for the possibility of the formation of modern fundamentalist movements, and in the 'Axis Age' and the emergence of ideological politics he sees the source of the emergence of proto-fundamentalist movements. In this context, an important role in the discussion of the dimensions of fundamentalism is played by the findings on the historical consequences of modernity, colonialism and globalisation, which have created and continue to create different conditions in different geographical areas, which translates into the way in which individual movements of this type are formed and operate. These disparities are aptly signalled by Kepel's succinct remark on the effects of the crisis of modernity, which he observed in the 1980s; it exposed "the emptiness of liberal and Marxist secular utopias, which have led to selfish consumerism in the West, and, in the socialist countries and the Third World, to repression, poverty and a dehumanized society"⁵³.

A significant part of the discussions among researchers of the phenomenon concerning the dimensions of fundamentalism focuses on its origins. It seems to be a widely shared conviction, as evidenced by the collected material, that it is a reaction connected with a sense of threat, while what is considered threatened by fundamentalist movements and what constitutes the source of this threat is negotiable. In the first case, researchers point primarily to a particular tradition and belief system, but also to social order, identity and status, self-esteem and confidence, stability and security. In the second case, we can distinguish positions which see the source of the threat in one or a limited number of factors, such as the crisis of modernity, globalisation, rapid changes in society and culture, anomie, marginalisation, secularisation, etc. The difficulty in grasping this dimension of fundamentalism lies to

⁵³ G. Kepel, *The Revenge of God*, op. cit., p. 5.

some extent in the fact that a single factor, such as 'the acids of modernity', to use Walter Lippman's term, may be considered variously; Motak, for example, singles out the processes of rationalisation, pluralisation and secularisation as fundamental to an understanding of modernity, while Bruce explains its nature by also pointing to other phenomena – the fragmentation of social space, atomisation, acceleration of change or individualism.

Moreover, the singularity of a given factor is only conventional. Usually, as can be seen in the above example, it is broken down into a number of components, which often include processes or phenomena treated separately by other researchers. However, the multiplication of causes, making fundamentalism the resultant of a too numerous series of conditions, introduces another difficulty – that of making credible the fact that it may appear in different parts of the world and in a different environment. In this aspect, another quantity occupies a significant place since fundamentalist movements, as researchers indicate, do not exhaust themselves in reaction to a threat; they are a counter-reaction, striving to transform social reality according to a reconstructed plan. Hence, they can be seen as "movements that preach a contemporary religious utopia"⁵⁴ or "a modern mode of certain types of utopian heterodoxies"⁵⁵.

It should be added here that it is also questionable whether fundamentalism is exclusively a type of socio-political movement. Perhaps the frequent narrowing of the scope of the term has been due to the fact that, as Albert Pawłowski notes, "as long as fundamentalism is not a movement, it does not arouse interest as a phenomenon"⁵⁶. The political scientist charts the successive stages in the development of fundamentalism, from the stage of thought, followed by group consciousness and doctrine, to the stage of movement and finally totalizing power⁵⁷. According to him, therefore,

fundamentalism is a set of ideas that dominate the political agenda (thoughts, positions, ideologies, doctrine, programme, social movement, or way of governance in all or some of the above fields of activity). Its core is a system

⁵⁴ E. Pace, P. Stefani, *Współczesny fundamentalizm religijny*, op. cit., p. 14.

⁵⁵ S. E. Eisenstadt, "The Jacobin Component of Fundamentalist Movements", op. cit., p. 938.

⁵⁶ A. Pawłowski, "Czym jest fundamentalizm?", op. cit., p. 7.

⁵⁷ See *ibidem*, p. 8.

of values that aspire to be unquestionably universal, only right and proper and indispensable for the pursuit of happiness in some definable timespace, containing a self-realisation directive, regardless of the circumstances and at all costs⁵⁸.

We will find relatively few cases of lack of interest in the issues of attitude or style of thinking in the conceptions of fundamentalism, but due to the fact that it is considered a social phenomenon, the focus is on its representative mode of occurrence in the form of a socio-political movement. Nevertheless, in addition to its characteristics, the properties of the fundamentalist attitude and the very relationship between the specificity of the movement and the personality of its members are frequent objects of attention in the dimension under discussion. In this context, the scale ranges from dogmatism to fanaticism with an internalised propensity to use violence⁵⁹. In order to explain the characteristics of the fundamentalist attitude as a form of prejudice and to demonstrate the complementarity of the individual and social aspects in this type of movement, researchers also draw on coherent and holistic concepts, such as the authoritarian or protean personality⁶⁰. At the same time, it seems reasonable to accept the view that the members of a given fundamentalist movement differ from one another in the combination and intensity of certain traits, and thus that these movements are internally relatively diverse.

Finally, it is crucial to address the question of a distinguishable set of characteristic practices of fundamentalist movements, such as a specific way of reading sacred texts and traditions or the absorption of the latest technologies. The discrepancies between the approaches in this dimension largely depend, on the one hand, on the material scope of the notion adopted by a given researcher; the broader the spectrum, for example, combining Protestant and feminist fundamentalism, the fewer similar practices recurring and forming a common set; on the other hand, the shape and type of practices emphasised in a given fundamentalist

⁵⁸ Ibidem.

⁵⁹ See E. Pace, P. Stefani, *Współczesny fundamentalizm religijny*, op. cit., p. 21-22.

⁶⁰ See D. Motak, *Nowoczesność i fundamentalizm*, op. cit., p. 42-43, 179-191; *Idee i ideologie we współczesnym świecie*, op. cit., p. 95-97; J. Sielski, "Fanatyzm i fundamentalizm w polityce", op. cit., p. 328-332.

movement are very strongly related to the characteristics and distinctiveness of the ideology of which it is a variant. It seems that theoretical negotiations in this aspect should be accompanied by Giddens' suggestion according to which it is not so much a particular ritual or a particular way of acting in a given situation that is associated with fundamentalism, but rather "how the truth of beliefs is defended or asserted" using a set of practices proper to the ideology of which the movement in question is a radical variant.

To sum up, in its essential part the study presented a review of selected positions of researchers involved in creating the theory of religious fundamentalism. These were religious scholars, sociologists, political scientists and philosophers, representatives of both Western and Polish academic centres. The indicated and catalogued differences and divergences between their proposed approaches to the issue do not have to be seen here as a shortcoming, as they give us a multilateral, profound and advanced understanding of this phenomenon and an orientation as to which dimensions and why of the object of the theory of fundamentalism are discussed and negotiated between the researchers. Such an understanding of fundamentalism may make the concept useful for the pedagogy of religion and general pedagogy. This usefulness can, as it seems, concern two levels. One is formed by the research on religious education in fundamentalist movements. Due to their largely hermetic and exclusive character, it should be assumed that the specificity of this education is manifested both in the plan of assumptions, content, means, organization, effects, as well as the shape and influence of the pedagogical and educational environment. Moreover, the production of knowledge about such movements within a critically oriented pedagogy of religion can help to answer the question of education leading to fundamentalism. The second plane is formed by the possibilities of applying the concept of fundamentalism to educational theory. If we assume that every ideology is a breeding ground for its fundamentalist variant, then general pedagogy may be interested in studying the issue of fundamentalism in educational ideologies. To achieve this goal, it seems necessary to develop and use the knowledge and experiences concerning religious and secular fundamentalism of other scientific disciplines.

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THE DYNAMICS OF ILLITERACY FORMATION IN INDIA¹

ABSTRACT:

India is one of the fastest growing countries in the world. At the same time, there are 272,700,941 illiterate people in India, most of whom are marginalized by factors such as poverty, gender, disability, and caste. Children are often forgotten, remaining invisible in the strictly hierarchical Indian society. Access to education reserved for the highest castes has led to marginalization of the lowest castes, especially untouchable Dalits. This paper deals with illiteracy in India, its causes and the barriers to overcoming it that lie within the society. The aim is to inform the reader about the problem of discrimination in education which leads to illiteracy.

KEYWORDS:

illiteracy, India, education, Dalits, educational policy

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CASTES, RELIGIONS AND DEMOGRAPHIC PROFILE IN INDIA

Access to education, restricted over the centuries to the highest castes, has led to the isolation of some sections of society from learning and has deprived them of influence on its development. Castes still determine the social order today, although officially they have been abolished². The word *caste* comes from Portuguese and means *species*. Indian society is divided into four *varnas* (castes): Brahmins, knights, merchants and farmers, servants, and untouchables so-called Dalits, who are outside the caste system. According to the interpretation of Rigveda, each caste is formed from a corresponding part of the body of a cosmic person, Purusha, which determines their relationship to ritual and the nature of the activities of daily life.

The duty of a Brahmin, growing out of the mouth of Purusha, is to study and perform ritual functions combined with a magical influence on the minds, emotions, and imagination of the members of other castes. Their tasks included learning the truth and teaching, as well as putting into practice the thoughts of the sages. The caste of Kshatriyas, knights and rulers, who protected the land and welfare arose from the arm of Parusha. The studies of the Kshatriyas were functional in nature and prepared them for governance and warfare. In matters of understanding the laws of life, they sought advice from Brahmins, who explained the regularities and ways of fulfilling dharma³. The Vaishya caste, which arose from the hips of Parusha, led a life of economy, craftsmanship and agriculture, and regenerated itself educationally. The fourth caste, the Shudras, arose from the legs of Parusha and performed subservient work⁴.

The sacred books contain rules to help maintain the ancient social order, and those related to marriage are the foundation of the caste system. Mixed unions are prohibited and marriages are arranged by parents. Intra-caste endogamy is the foundation of the entire social order. In the old days, Buddhism and Jainism undermined the caste order and

² See H. Mystek-Palka, "Edukacja dorosłych w Indiach", [in:] *Edukacja dorosłych w wybranych krajach pozaeuropejskich*, ed. A. Frąckowiak, J. Półturzycki, Warszawa 2011, p. 320.

³ See Z. Krawczyk, *Rabindranath Tagore – poszukiwanie prawdy i piękna w teorii i praktyce wychowania*, Warszawa 1990, p. 39.

⁴ See *Pedagogika. Podręcznik akademicki*, ed. Z. Kwieciński, B. Śliwerski, Warszawa 2004, p. 83.

endogamy, but now politicians want to reduce social inequality by guaranteeing certain privileges to underprivileged groups. In the nineteen twenties, the British authorities began to enrol the lowest castes and tribes on special official lists in order to include them in the welfare program. From this period also come their names, such as oppressed castes, or scheduled castes⁵.

The most abhorrent element of the caste system is the practice of untouchability, which covers about one-sixth of the Indian population. In addition to Dalits, also known as pariahs, children of God⁶, India's tribal people have also suffered persecution from society. The Indian government has been fighting against caste-based discrimination. Numerous penalties have been imposed on those who discriminate against others; however, there are many reservations about their effectiveness⁷.

The system of preferential treatment for members of the castes who occupied the lowest positions in the hierarchy in the traditional society has led to the phenomenon of positive discrimination. People from the list of scheduled castes and tribes are provided with reservations in schools, universities and government jobs, both at the local and central level. In addition to this, the scheduled castes are covered by the social and financial assistance system, they are given additional scholarships and free dormitories. In practice, widespread corruption and nepotism effectively limit the use of these privileges, especially for those who really need such help, i.e. the poorest and least educated⁸.

The underprivileged classes, who hitherto had no chance of social advancement, constitute 30% of India's population. the Scheduled castes constitute about 40% of this category, or 15% of the total Indian population. Scheduled tribes, or 7% of the population, account for 20% of this category⁹. The use of group identities reveals one of the paradoxes of

⁵ See P. Łodziński, *W dążeniu do równości*, Warszawa 1993, p. 95.

⁶ Mahatma Gandhi called the untouchables Harijans, or children of God, which they didn't like and the name basically didn't catch on.

⁷ See D. Jakubowska, R. Rydzewski, "Prawo a rzeczywistość-współczesna sytuacja Dalitów w Delhi", [in:], *Indie w XXI wieku. Wybrane problemy*, ed. A. Potyrała, M. Skobrtala, Poznań 2009, p. 82.

⁸ See M. Browarczyk, "Wybrane aspekty sytuacji kobiet w Indiach współczesnych", [in:] *Międzykulturowe i interdyscyplinarne badania feministyczne. Daleki – Bliski Wschód: współczesność i prehistoria*, ed. E. Pakszysz, Poznań 2005, p. 68.

⁹ See P. Łodziński, *W dążeniu do równości*, op. cit., p. 144.

egalitarian Indian government policy. On the one hand, it seeks to abolish inequalities based on caste, while on the other hand, the use of caste identifications in positive discrimination policies helps sustain traditional social divisions. It pays to be untouchable and to pass this identification on to future generations so that they can enjoy preferential treatment¹⁰. In the name of egalitarianism of the masses, the fundamental principle of equal start is being questioned, regardless of race, caste, religion or wealth status¹¹.

In Indian society, Brahmins have achieved the highest progress in higher education. According to the researchers, this is related to the original axiom that people are not equal. Education has been and remains one of the means of maintaining social divisions, creating a distinctly hierarchical structure in line with the classical caste division. Today this fact is cited as one of the reasons for the mass illiteracy of Indians¹².

The school system in India reflects the country's linguistic diversity, which facilitates education in regional and ethnic languages. There are about 800 indigenous languages called native languages in use, along with about 1,700 dialects, from four language groups: Indo-European, Dravidian, Austroasiatic and Sino-Tibetan. Hindi is the official language, while English is the so-called auxiliary language¹³. The largest languages in terms of number of speakers are Hindi, Bengali, Telugu, Marathi, Tamil, Urdu, Gujarati, Kannada, Malayam, Oriya, Punjabi, Adamic and Maithili¹⁴. In each state, there is an official state language and education is provided in the state language, English or Hindi, i.e. it has a trilingual form of instruction. As a rule, states where the official language is Hindi do not teach a third language. The roots of this system can be traced back to the beginnings of the Indian state, as colonial India was divided into principalities and provinces, which were not linguistically homogeneous.

Followers of different religions live within one country: Hinduism, Buddhism, Islam, Jainism, as well as Sikhs, Christians and Jews. Each of

¹⁰ See *ibidem*, p. 197.

¹¹ See P. Tokarski, P. Bhutani, *Nowoczesne Indie. Wyzwania rozwoju*, Warszawa 2007, p. 138.

¹² See K. Dębicki, *Konflikt i przemoc w systemie politycznym niepodległych Indii*, Warszawa 2006, p. 102.

¹³ See K. Mylius, *Historia literatury staroindyjskiej*, transl. L. Żylicz, Warszawa 2004, p. 16.

¹⁴ See M. Skorbtal, "Różnorodność językowa a federalizm w Indiach", [in:] *Indie w XXI wieku*, op. cit., p. 46.

these groups follows distinct customs and traditions. The traditional Hindu social structure is very viable and at the same time absorbs new castes, creating 'Hindu Christians' from Christians and 'Hindu Muslims' from Muslims. There is still a division between Muslims who came to India with the invading armies and who considered themselves superior for that reason, and the local converts, who usually came from the lower Hindu castes. The converts largely retained parts of the Hindu tradition, which either survived intact or were partly adapted to the requirements of the new religion.

Indian Islam is very much permeated with Hindu elements, Sufi Muslims are close to Indian yogis, and the Bhakti movement contains many elements from Islam. The system of social stratification among Muslims also resembles the caste system characteristic of Hindus, but Muslim groups are less strict with their followers. Hindu-Muslim marriages are prohibited from a religious point of view. A similar phenomenon is observed among Hindu Christians.

Christianity was usually adopted by representatives of the lowest castes, and they were attracted to the new religion by egalitarianism and association with the ruling class of India's British. In fact, the newly converted Christians have retained the division into 4 varnas, and the Catholics have their own churches¹⁵. Sikhism emerged in the 15th century as a synthesis of religious and social concepts of Islam and Hinduism. By the end of the 17th century they had evolved into a distinct religious group and had become a warrior group nurturing soldierly qualities, and were so regarded first by Moguls and then by the British, who enlisted them particularly readily for military service¹⁶.

In 2011 India was inhabited by 1,051,404,094 people¹⁷. In a few decades, India's population has grown from 345 million to over one billion. This has been due to several factors, including reduced infant mortality from 146 to 110 per thousand and increased life expectancy from 26 years to 64. Despite the increase in population density, India is still not urbanized, with only 28% of the population living in urban areas. With higher levels of urbanization comes the phenomenon of slums, unheard of in Eastern cities; in Mumbai alone, half of the population live there.

¹⁵ See K. Dębicki, *Konflikt i przemoc w systemie politycznym niepodległych Indii*, op. cit. p. 73.

¹⁶ See ibidem, p.157.

¹⁷ <http://censusindia.gov.in>, access: 20.03.2012.

The position of women in India varies from region to region. This is because in the most economically backward regions, the influence of patriarchy and Muslim culture is more persistent. The northern states of Rajasthan, Haryana, Bihar, Madhya Pradesh and Uttar Pradesh are the most backward, while Karnataka, Kerala, Tamil Nadu and Andhra Pradesh in the south are the most developed¹⁸. A particular feature of India's demographic profile is the scarcity of women. There are 933 women for every 1,000 men. The shortage of women is the result of actions taken by the Hindu ranging from infanticide to neglecting and murdering young daughter-in-laws. Abortions due to sex determination during prenatal screening have increased in recent years. In 1994, parliament passed an act banning abortions based on the sex of the foetus, but with widespread corruption, such legislation will not put a stop to the practice¹⁹. The birth of a daughter is a burden on the parents, they cannot afford dowry while marrying their daughters off.

Female illiteracy is another indicator of their neglect in Indian society. According to the 2001 census, about 46% of women were illiterate. Life in a traditional Indian village does not encourage girls to study, and the education of a daughter or daughter-in-law is considered unnecessary. Sons are the desired offspring, as parents expect from them support in old age²⁰. The south of India, matriarchal, uses contraception successfully and has a lower female mortality rate. In the north, a stronghold of patriarchy, girls as young as ten are married off only to bear children until they succeed in giving birth to a son. It is the patriarchal view of women as bearers of children, without allowing them to have contraception as they wish, that is a big obstacle to family planning²¹.

Child marriage, which is forbidden by law, is still practiced in India because poor families then have little or no need to accumulate a dowry. Marriage before sexual maturity provides a guarantee of 'purity'. The

¹⁸ See M. Browarczyk, "Wybrane aspekty sytuacji kobiet w Indiach współczesnych", [in:] *Międzykulturowe i interdyscyplinarne badania feministyczne. Daleki – Bliski Wschód: współczesność i prehistoria*, ed. E. Pakszysz, Poznań 2005, p. 65.

¹⁹ See *ibidem*, p. 71.

²⁰ As life expectancy increases, so does the number of people requiring care in old age. At present, India has little in common with the welfare state, it is not affected by the problem of pensions for the elderly.

²¹ See D. Rothermund, *Indie. Nowa azjatycka potęga*, transl. A. Tarnowska, E. Tarnowska, M. Zwoliński, Warszawa 2010, p. 216.

patriarchal system not only promotes the restriction of women's rights and the subordination of their will and power to men, it also glorifies the excellence and virtue of women who remain single. This is not for the benefit of women, but for the benefit of the family, especially its male members. The enforced isolation of girls and women, the veiling of the face and figure, and submission to norms set by men are still a symbol of honour and a status marker not only for themselves, but for the entire family. Women's sexuality is controlled and protected from an early age by men who are related to women²². To this day, a remnant of *parda* can be seen in Rajasthan²³, women there cover their faces and heads with a wide scarf or a sari seam²⁴.

In the 1980s, a middle class emerged as a result of India's rapid development. The very idea of it was new in India; before the era of colonization, its alternative was the *jati*, the indigenously Indian concept of caste. The evolution of middle classes indicates their increasing participation in India's economy and politics²⁵. The size of the middle class is estimated at 150-250 million people. Three subgroups can be distinguished from this group: the first, living just above the subsistence level, can afford very little. This includes teachers and small businessmen. The new middle class, which includes educated city dwellers and landowners, is in the middle. The third, upper layer, includes businessmen, industrialists, who make up only 1% of society. The middle class is divided into the old 'national' class and the new class. The old class, created during Nehru's time, is made up of old-school freedom fighters who look up to the model of the British gentleman. Most often they are doctors, lawyers, lecturers and work in the state administration. They speak mainly English²⁶. Women are not very mobile, the control imposed by the family is quite

²² See A. Sieklucka, "Równouprawnienie kobiet w sikhizmie", [in:] *Być kobietą w Oriencie*, ed. D. Chmielowska, B. Grabowska, E. Machut-Mendecka, Warszawa 2008, p. 82.

²³ *Parda* – a Muslim custom of seclusion for women, which from the 16th century onwards was accepted as a mark of social prestige by the upper classes of society, including the followers of Hinduism. Women lived in a separate part of the household and their contact with the outside world was very limited and strictly controlled by male family members. *Parda*, from Persian literally means veil.

²⁴ See M. Browarczyk, "Wybrane aspekty sytuacji kobiet w Indiach współczesnych", *op. cit.*, p. 67, 83.

²⁵ See P. Tokarski, P. Bhutani, *Nowoczesne Indie*, *op. cit.*, p. 141.

²⁶ See D. Rothermund, *Indie*, *op. cit.*, p. 236.

high due to the restrictive desire to maintain the caste purity²⁷. The new middle class is more modern, women have stepped out of the shadow of their husbands and earn a living for themselves, have their own income, are more mobile, and change partners more often. Families where both spouses work often hire servants to help out, and the wealthiest provide housing at their residence. Social status symbols in India include a cell phone, a computer, a scooter and finally a car. Unfortunately, one of the main objects of middle class consumption is the labour of the poor.

In India, a minimum number of calories consumed has been adopted as the criterion for determining the poverty line since 1962. The poorest states include: Bihar, Orissa, Madhya Pradesh, Uttar Pradesh, while the richest states are: Haryana, Punjab, Kerala, Gujarat, and Himachal Pradesh. Attempts to define poverty focus primarily on physical viability and do not take into account illiteracy, for example. The Indian poor make up 30% of the population, are illiterate, and have a daily income of \$0.43. At the same time, they are a powerful source of cheap labor. A striking manifestation of the urban poor are the huge slums disfiguring India's cities²⁸. Having children is sometimes considered by the poor as gaining extra hands to work, which can bring additional income to the family. Girls between the ages of 5 and 11 take over most of the household chores that customarily belong to women's activities: cooking, cleaning, caring for younger siblings, carrying water or firewood, chores in the fields. Their work goes unnoticed because their mothers do not see these activities as work. Children are employed in big numbers to carry out such activities as: making paper bags, ornaments, carpets, matches, cigarettes, collecting rags and selling newspapers. They often work at home making incense sticks, cakes, or assist their mothers in making various items. The poor perform specific low-paid, unskilled, menial jobs with no opportunity for change or advancement. The lack of educational opportunities, the lack of prospects for a better job and for a change in their life situation drives girls and boys into the vicious circle of poverty²⁹.

²⁷ See M. Browarczyk, "Wybrane aspekty sytuacji kobiet w Indiach współczesnych", op. cit., p. 77.

²⁸ See D. Rothermund, *Indie*, op. cit., p. 254.

²⁹ See M. Browarczyk, "Wybrane aspekty sytuacji kobiet w Indiach współczesnych", op. cit., p. 75.

EDUCATIONAL POLICY IN INDIA BEFORE 1947

In the traditional model of teaching, the main centre of learning was the gurukul. The student lived with his guru's family for many years. A large part of his learning consisted of memorizing the holy texts. When a student became a teacher himself, he passed on his knowledge to the next student and thus participated in the guruparampara. The language of instruction was Sanskrit, a sacred language not understood by most Indians. The philosophical treatises, the Upanishads, were the basis for the training and education of the Brahmins. They studied them and imparted knowledge to the lower castes. The most famous university of the time was located in Naimisha and educated ten thousand students. Such education was reserved for a limited group, but it allowed Indian culture to survive for centuries³⁰.

Hindu religion is characterized by a belief in the repeatability of the cycles of creation of the world and the concept of a birth: the first birth is the birth of a child into the world, the second time a person is born through initiation, and the third time he or she is born after death, in a new incarnation, according to the rule of karma. The conviction of the soul wandering and its new incarnations puts the whole Indian upbringing in a different context, unfamiliar to European reflection on human upbringing. It is associated with the theory of merit and transmigration, a symbolic circle of a series of new incarnations, which provide the possibility of spiritual maturation of man. The birth of a child is identified with chaos, lack of discipline and life on a biological level. During childhood, a person lives surrounded by unconditional love, often under the care of servants, free from educational interventions and directing pressures. The child, like the natural world, develops even though no one directs this process. Its existence until initiation is devoid of social and religious status. The child ends its existence as a natural human being when passing from nature into the world of tradition and spiritual life at the age of eight³¹.

The Indo-Islamic system, which was initiated by Mahmud of Ghazni and brought to its full flowering by Emperor Akbar, was a great

³⁰ See *Pedagogika*, op. cit., p. 83.

³¹ See Z. Krawczyk, *Rabindranath*, op. cit.

synthesis of Islamic and Hindu thought, the equivalent of cooperation between Muslims and Hindus in the fields of language, literature, painting, architecture, and religion. The institutions of madrasa and Koranic school were introduced, which focused on imparting religious knowledge exclusively to boys.

However, when the British took control of India, the country's education system was not organised in any systematic way and was extremely elitist. Hindus and Muslims had their own separate schools, closely related to their religion³². The model of education introduced by the British created a new elite. Colleges, government or missionary, run by various church organizations, became the centres of education established by the colonizers. The first college based on European standards was established by Raja Ram Mohan Roy in 1817. The language of instruction was English. The main problem for Indians was the introduction of discipline into schools, which Indians were not used to. Benches, exams, precisely timed classes, and an all-knowing teacher were all unknown in traditional gurukul-based Hindu education. British teachers sought to educate Hindu students about the cultural models that they themselves had inherited from their ancestors. Thus, these were not Hindu but European models, often not understood or internalized by the students.

The traditional model of education was based on encyclopaedic knowledge that the student had to acquire and on cultural transmission, without confronting it with current economic, social or political issues. The British Crown needed clerks and lower-level functionaries who could become their instrument in managing the Indian empire. There was no need to train scientists or engineers, and typically general humanistic knowledge was sufficient for the British administration. In 1857, the universities of Bombay, Calcutta, and Madras were founded. These were branches of British universities, and the standardized curriculum was adapted to the requirements of the University of London. Thus, no educational system was established in India, and the British made no effort to distinguish between the method of education in Britain and outside Britain within the empire. Nor did the British see the need for elementary schools. Parents wishing to educate their children

³² See K. Dębicki, *Konflikt i przemoc w systemie politycznym niepodległych Indii*, op. cit.

hired private teachers. The British administration did not want to spend money on primary education and did nothing regarding this matter until the end of its reign³³.

EDUCATIONAL POLICY IN INDIA AFTER 1947

After 1947 the Indian educational system came under the influence of contradictory trends. On the one hand, there was the legacy of the past, i.e. casteism and educational inequalities created during the colonial period. On the other hand, education was at the center of the egalitarian social aspirations of Indians. After 1947, the vision of building the infrastructure of a society based on knowledge was born. Already just before the liberation, the development of education was part of the Gandhian ethos. In the 1950s, preferential schemes were created for the lowest castes and tribes. The constitution statutorily guaranteed certain privileges to the 'underprivileged groups' such as pools of seats in primary, secondary and higher education, scholarships, food and dormitories, and a guarantee of posts in the public sector³⁴. Compulsory primary education for children up to the age of 11 was introduced in independent India, and governments have often published impressive statistics on school attendance. According to the National Policy of Education launched in 1986, 6% of GDP was to be spent on education. In 2003, spending on education accounted for only 3.5% of GDP³⁵.

Education in India is characterized by a significant degree of elitism. Financial outlays for education are directed primarily as grants to private schools and elite government institutions and to secondary and higher education, rather than to mass primary education. In India today, spending on higher and secondary education, from which at most 30% of the population benefit, consumes as much as 60% of all education expenditures. The best institutions include private schools run by nuns or monks, educational societies, language minorities, ethnic and caste groups, private entrepreneurs and sponsors. These schools

³³ See J. Justyński, *Myśl społeczna i polityczna renesansu indyjskiego od Rama Mohana Roya do Rabindranatha Tagora*, Warszawa 1985, p. 254.

³⁴ See Z. Krawczyk, *Rabindranath Tagore*, op. cit.

³⁵ See D. Rothermund, *Indie*, op. cit., p. 226.

initially teach in Hindi, on the premise that it is easier for children to absorb information in the language they have spoken since birth. Later, they gradually switch to English, which is then used to teach all subjects from the sixth grade onwards³⁶. The cultural divisions of Indian society can be observed in the diversity of schools within the private sector. Schools group students and teachers from specific communities, which contributes to perpetuating traditional social divisions and segmenting Indian society. Private schooling has been and will continue to be for the most affluent and socially mobile groups, and the cultural exclusivity makes it inaccessible to the rest of society³⁷.

In 2009, the Indian Parliament made it mandatory for the state to provide all Indian children with a place in school. The right to education was given to children who had never attended school, some due to insufficient parental interest in this matter, others due to lack of school space. In poorer, overcrowded districts or villages, the school network is inadequate and children have difficulty enrolling. They often do not have the documents required by school authorities, for instance only due to the fact that they were born in a place where no one issued birth certificates³⁸. A characteristic feature of the poorest social groups is their high school dropout rate – over three times higher than among children from higher castes – and second-rate education. The main reason for this is the attitude of parents who expect their children to become productive as soon as possible and bring income to the family. They treat education as a waste of time and an unproductive investment³⁹.

The level of education in free elementary school is very low. There are no qualified teachers, no teaching aids, no electricity, no toilets, no study rooms, or water to drink. Most children do not pass the state exams, many have retakes, so they are automatically disqualified and marginalized from society. Primary education has been affected by a high percentage of children dropping out of school after only a few grades, or repeating the same grade for many years before finally dropping out and feeding the army of cheap, uneducated labour or the

³⁶ See M. Skakuj-Puri, *Życie codzienne w Delhi*, Warszawa 2011.

³⁷ See P. Łodziński, *W dążeniu do równości*, op. cit., p. 189.

³⁸ Government of India, *Economic Survey 2010*.

³⁹ See P. Łodziński, *W dążeniu do równości*, op. cit., p. 146.

unemployed. It was 73% in the 1990s and dropped to 31% in 2003, largely influenced by the introduction of free meals in all schools⁴⁰.

The gap between official government rhetoric and actual policy is intriguing. The constitution recommends the introduction of compulsory primary education, but child labour has not been abolished. Politicians call it a sad necessity; according to experts, children work in every third family and the income generated by minors accounts for 20% of India's GDP. The rule that children under the age of fourteen should not be employed has no bearing on reality. It is common to employ children in service even below the age of ten⁴¹.

THE PHENOMENON OF ILLITERACY IN INDIA

According to the UNESCO definition, an illiterate person is someone who is unable to read, write and understand a short, simple text concerning his or her everyday life and is at least 15 years old. A functional illiterate is someone who has attended school and has even learned something, but has never mastered the skills of reading, writing and arithmetic in everyday life. Only when forced to work, due to lack of these competencies, he or she finds himself or herself on the margins of society and is at the highest risk of unemployment, which in turn leads to poverty, slum life and greater loss of health. Functional illiteracy is seen as a problem in countries that require more and more competencies due to technological advances⁴².

According to UNESCO statistics, there are currently about 950 million men and women in the world who have not mastered the elementary cultural skills of reading and writing. Even more frightening is the fact that over 135 million children do not attend school, and over 60% of them are girls. By comparison, the illiteracy rate in Poland is 0.7%, in Brazil 10%, in Thailand 6%, in China 6.7%, in Vietnam 9.7%, in Egypt 43.6%, in India 44%. This puts the country almost at the bottom of the list of 182 countries where illiteracy levels among the population over 15 years of age have been surveyed⁴³.

⁴⁰ See D. Rothermund, *Indie*, op. cit., p. 226.

⁴¹ See K. Dębicki, *Konflikt i przemoc w systemie politycznym niepodległych Indii*, op. cit., p. 101.

⁴² See B. Śliwerski, "UNESCO o analfabetyzmie", *Edukacja i Dialog* 2010, no. 1.

⁴³ Government of India, *Economic Survey* 2010, p. 271.

Table 1. Illiteracy rate in years 1951–2018⁴⁴

Year	Total	Men	Women
1951	82,0	73,0	92,0
1961	72,0	60,0	85,0
1971	66,0	55,0	79,0
1981	57,0	45,0	71,0
1991	48,0	35,0	61,0
2001	35,0	25,0	47,0
2011	26,0	18,0	35,0
2017–2018	22,3	15,3	29,7

Source: Census of India, Provisional Population Totals, India 2011, p. 102; Ministry of Statistics and Programme Implementation, National Statistical Office, Household Social Consumption: Education in India as part of the 75th round of National Sample Survey – from July 2017 to June 2018, New Delhi 2019, p. 11⁴⁵.

In 1951, only 8% of women and 27% of men in India could write and read. In 1960, universal education was made compulsory for all children up to the age of 14 pursuant to the Constitution. The vast majority of illiterate people in India come from the lowest income families living in rural areas. Poverty, the need to support the family, lack of funds for children's education, and working since childhood are the main reasons for not attending school (self-selection) or starting school late, skipping classes, second-rate or dropping out altogether after two to three years of elementary school. The highest absenteeism from school occurs during

⁴⁴ Researchers in India, compiling a report on illiteracy in the country, adopt a different definition of an illiterate person from the one adopted by UNESCO. According to their definition, an illiterate person is a person who cannot read or write and is older than 7 years. This definition makes it possible to include in the statistics all school-age children who are enrolled in compulsory education, but who do not start school. This, in the opinion of the researchers, gives a much clearer picture of the situation, since in the future these children will join the ranks of adult illiterates. In the following sections, statistics will be based on one or the other definition, depending on the sources cited.

⁴⁵ Actualization: [1.06.2022].

the peak period of work in the field or at a nearby factory⁴⁶. Female illiteracy is another indicator of their relative neglect in Indian society. According to the 2001 census, about 46% of women were illiterate, while among men, 24% could not write or read⁴⁷.

Table 2. The number of Indian residents who can write and read according to the data from 2001 and 2011

Literate/illiterate	Total	Men	Women
Population over 7 years old			
2001	864,900,041	447,214,823	417,685,218
2011	1,051,404,094	540,772,113	510,632,022
Literate			
2001	560,753,179	336,571,882	224,181,357
2011	779,454,120	444,203,762	334,250,358
Illiterate			
2001	304,146,862	110,643,001	193,503,861
2011	272,950,015	96,568,351	176,381,664
difference	-31,196,847	-14,074,650	-17,122,197

Source: The Census of India, Provisional Population Totals, India 2011.

In the 21st century, more than 1/4 of the Indian population is illiterate, the majority of whom are women. The geographical distribution of illiteracy is of great importance. Several northern states have the highest levels of illiteracy⁴⁸. As an example, despite many attempts by the government and non-governmental institutions to reduce illiteracy, in several states, instead of decreasing, the number of illiterate people

⁴⁶ See P. Łodziński, *W dążeniu do równości*, op. cit., p. 151.

⁴⁷ *International Literacy Statistics: A Review of Concepts, Methodology, and Current Data*, Montreal 2008.

⁴⁸ Census of India, *Provisional Population Totals*, India 2011, p. 98.

has increased in the last ten years. It is important to note that the population has more than doubled in the last few decades. Despite the increase in the percentage of literate people, there has been an increase in illiteracy in Rajasthan in absolute numbers. Studies show that in 2001, only 55% of males and 20% of females above the age of 15 could write and read in Rajasthan, while in 2011, 76.5% of males and 44.5% of females could read in the same state⁴⁹. This shows some upward trend but it cannot be said to be a satisfactory result because from 2001 to 2011 the number of illiterate people in Rajasthan has increased from 18,154,176 to 19,145,596 that is by 991,420 which is an increase of 3.18% in 10 years. According to the data from the Census of India, the rate of illiterate women in 2011 was the highest in the whole of India and was 47%⁵⁰.

In 1999, 87.4% of the boy population aged 6-10 years attended school in rural areas in Rajasthan, 82.8% aged 11-14 years and 88.5-88.9 in urban areas. As for girls living in rural areas, 66% went to school at the age of 6-10 years and only 44.9% at the age of 11-14 years, while in urban areas 82.7% at the age of 6-10 years and 75.5% at the age of 11-14 years respectively. In both cases, a downward trend is evident, and the most disturbing is the low participation of girls above the age of 11 years in education (less than 50%)⁵¹.

The social groups with the highest percentage of illiteracy include women, the poorest strata, and rural dwellers. Life in a traditional Indian village does not encourage women to learn to read and write. There is some similarity here with medical care. Just as a parent would take his son to a doctor and send him to school, the education of his daughter and daughter-in-law would be considered unnecessary. The urban middle class sees it differently, but since the vast majority of Indians live in rural areas, those who see the need for women's education are in the minority⁵². Among the wealthier strata of society, women's education is treated as a 'luxury consumption' that can indicate family prestige.

⁴⁹ See G. Kingdon, R. Cassen, K. McNay, L. Visaria, "Education and Literacy", [in] *Twenty First Century India. Population, Economy, Environment and Human Development*, ed. T. Dyson, R. Cassen, L. Visaria, New Delhi 2004, p. 136.

⁵⁰ <http://censusindia.gov.in>, p. 121, access: 20.03.2012.

⁵¹ See G. Kingdon, R. Cassen, K. McNay, L. Visaria, *Education and Literacy*, op. cit., p. 133.

⁵² See D. Rothermund, *Indie*, op. cit., p. 216.

Gender is an important factor that differentiates illiteracy levels in India. The majority of women who cannot read and write live mainly in rural areas and come from the lowest castes, primarily the registered ones. Parents play a huge role in women's education. They are responsible for half of girls' dropouts from elementary school. Casteism favours sons, whose education their parents see as their preparation for their potential role as breadwinners and investment in retirement. In India, the tradition of dowry, which is paid by the parents of the bride to the bridegroom's family, is still vivid. Most often it is a certain sum of money and gifts such as a car, consumer electronics and household appliances. The size of the dowry depends on the caste background of the groom, his socio-economic status, years of his education, the type of education he received⁵³.

Table 3. Share of employed girls in 1991 by selected states

State	Total number of the employed	Rate of girls at 5-14
Andhra Pradesh	5,530,000	10.54%
Bihar	3,350,000	2.93%
Karnataka	5,610,000	8.71%
Madhya Pradesh	4,790,000	8.56%
Rajasthan	4,570,000	7.88%
Uttar Pradesh	3,140,000	2.46%
Bengal Wschodni	3,230,000	2.68%

Source: Census of India 1991.

Place of residence is one of the most important factors influencing illiteracy levels. More than twice as many people can read and write in the city as in the country, and a woman is three times more likely to be educated in the city than in the country. Schoolchildren in the villages are introduced to adult roles, they help their parents with work in the

⁵³ See P. Łodziński, *W dążeniu do równości*, op. cit., p. 136-137.

fields and at home, they take up paid activities that bring immediate income. Ninety percent of working children live in rural areas, where traditional caste divisions play a much greater role than in urban areas. The persistence of educational inequalities in rural areas reflects the strength of caste dependency, which has not been eliminated in recent decades⁵⁴.

According to scientists, the causes of illiteracy can be traced back to parents themselves, who do not see the need to send their children to school, or to poverty, when children are forced to work. Often inadequate curricula that have nothing to do with the realities of everyday life make children feel that they will get nothing valuable from school and that learning will not be useful to them in life⁵⁵. These people do not see the possibility of using the book knowledge they have acquired in rural life.

Teachers themselves also contribute a lot to illiteracy. Most of them work in villages and often evade their duties and do not turn up for work. Studies have shown that 25% of teachers who should be teaching were absent. State authorities have no direct control and cannot check the attendance of teachers, and local governments are unable to discipline them. Teacher unions in India are also very powerful. They only care about salary increases, which leaves them short of funds for school buildings and the like. Researchers suggest that the control of the public education system by teachers' unions is a major reason for the breakdown of education⁵⁶.

A number of problems arise from high illiteracy, including the persistence of successive generations with traditional values and high birth rates. The low level of education of the Indian population hinders political and social reforms and faster economic development. It forces politicians to appeal to traditional values in terms of caste and religion, as these play a dominant role in local communities⁵⁷.

⁵⁴ See *ibidem*, p. 141.

⁵⁵ *International Literacy Statistics: A Review of Concepts, Methodology, and Current Data*, Montreal 2008.

⁵⁶ See D. Rothermund, *Indie*, op. cit., p. 227.

⁵⁷ See K. Dębicki, *Konflikt i przemoc w systemie politycznym niepodległych Indii*, op. cit., p. 100.

EDUCATIONAL STRATEGIES IMPLEMENTED TO COMBAT ILLITERACY

The task of public education is to awaken in the hitherto marginalized individual, a sense of competence and social utility, to instil a commitment to the ideals of equality, dignity, fraternity and freedom, to inculcate respect for democratic processes governing the initiation of discussion, critical appraisal and decision making, to nurture a mind-set characterized by integrity and scientific approach and to form the conviction that talent, qualifications and qualities of character should be valued. The only way to release potential among Indians, lies not in pulling them out of the bonds of tradition, but in introducing them to a vibrant and growing culture⁵⁸.

According to UNESCO, illiteracy can be prevented by the following means: a legal obligation of compulsory education for boys and girls; monitoring of pupils, teachers and schools by educational supervision; automatic promotion of pupils during initial education, better adaptation of teaching methods and equipping classrooms with appropriate teaching aids; continuous evaluation of pupils' educational progress; close connection between teaching content and people's lives so that the local community and parents can be involved in the school; better teacher training; hiring more teachers; free or subsidized provision of textbooks and learning aids; school meals; transportation to and from school for children who live far away⁵⁹.

The institution created to combat illiteracy among young people and adults is the "National Literacy Mission", established in the 1980s. Its main task is to teach children and adults to read and write, as well as to implement the idea of permanent education, according to which teaching lasts throughout life and takes various forms. The most popular forms of teaching in India are: religious festivals, processions, local art, puppet theatre, and folk songs⁶⁰. NLM activities are focused on the problems of children in the age group of 9-14 years and people in the age group of 15-35 years who have not benefited from educational

⁵⁸ See G. L. Gutek, *Philosophical and Ideological Perspectives on Education*, Englewood Cliffs 1988, p. 308.

⁵⁹ *International Literacy Statistics*, op. cit.

⁶⁰ <http://www.nlm.nic.in/>, access: 20.03.2012.

opportunities in the past or have not had access to the education system. Special emphasis is placed on extending the program to groups with fewer educational opportunities: women and children with learning difficulties as well as tribal and ethnic minority populations, untouchables and marginalized groups. In 1999, UNESCO presented NLM with an award for outstanding achievements in the field of combating illiteracy⁶¹.

One of the organizations set up for education is the SSA (Sarva Shiksha Abhiyan), which by 2009 created more than 2 million new schools, thus helping to reduce illiteracy. The other institution fighting illiteracy is RMSA (Rashtriya Madhyamik Shiksha Abhiyan). It is mainly concerned with improving the quality of secondary education, removing socio-economic barriers and increasing access to secondary education. The most successful in the fight against illiteracy is the introduction of meals for all children attending school. The number of children enrolled in elementary school has increased significantly, from 34 million in 1961 to 209 million in 2005⁶².

As the need for education has increased in recent years, many states have begun hiring so-called 'para-teachers'. Currently, there are about 400,000 of them working all over India. These are people with no specialized training, working for very low salaries, without a permanent contract. However, they perform their tasks better than government-paid teachers. As their jobs are insecure and their salaries are paid by the local government, they have to work hard to keep them⁶³.

One aspect of the new social education in India is the activation of youth, both urban and rural, to fight illiteracy. The National Service Scheme (NSS) promoted in 2001-2002 by 176 universities, aimed at setting up camps in villages, slum activities, to foster participation in foreign projects by young people⁶⁴.

In contrast to the theories formulated in the 1960s, when top-down modernization by central authorities was advocated, the importance of initiatives taken by people with their own ideas and plans who put them into practice at the local level is now emphasized. The school can become a vehicle for directing social change and reform. Teachers and students

⁶¹ See H. Mystek-Palka, "Edukacja dorosłych w Indiach", op. cit., p. 330.

⁶² Government of India, *Economic Survey 2010*, p. 270.

⁶³ See D. Rothermund, *Indie*, op. cit., p. 227.

⁶⁴ See P. Tokarski, P. Bhutani, *Nowoczesne Indie*, op. cit., p. 129.

should engage in action-oriented, solution-seeking research activity. This is based on the belief that there is a close relationship between school and society. Unresolved conflicts and tensions within the wider community spill over to school, teachers and students. For example, if Indian students are poor, hungry or discriminated against, their attitudes, aspirations and expectations of education may become distorted, eventually leading them to drop out of school. The role of this institution, therefore, becomes to help diagnose and identify the major problems that contribute to the cultural crisis and to instil the skills and attitudes that will address these problems. Illiteracy will not be eradicated until child labour is eliminated and parents are punished for not sending their children to school. Educational policies and programs must be developed to reform the society. This will not be possible unless the poorest people of India are made aware of the importance of educational development.

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BETWEEN STIGMA AND POTENTIAL – ACTION RESEARCH IN A COMMUNITY UNDER EXCLUSION¹

ABSTRACT:

The aim of the study is to present the results of pedagogical action research in socially excluded society – residents of social hotel in Wrocław. Area of research concentrated on the needs and potentials of the residents. The research was conducted according to the action research methodology and had three stages. Conclusions of the research pointed out that the community was touched by a stigma, which was a result of living in a social hotel. Residents felt a lack of security and recognition. The results of the research was the diagnosis of the residents' potentials, such as neighbourhood, subsidiarity and the ability to create a home-like atmosphere in highly degraded conditions. The research was accompanied by animation activities. They were based on the idea of empowerment, showing the hotel residents' ability to act and organise.

KEYWORDS:

action research, potential, social exclusion, stigma, social hotel (half-way house)

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INTRODUCTION

Mircea Eliade wrote that home is a sacred space for humans, a point of reference offering stability². It is the place from which one steps out into the outside world. However, it need not always be a safe *space*. This text describes the situation of people living in a social hotel (halfway house)³ and its consequences. Domestic spaces that are particularly affected by social problems, such as poverty, unemployment, alcoholism, violence, mental illness, and drug addiction, are a kind of stigma for the people living there. One could refer to Mariusz Jędrzejko, who used the metaphor of 'Polish favelas' when writing about areas of 'limited development'⁴, beset by numerous social problems. An example of a similar space is the aforementioned social hotel in Wrocław. The research conducted there between October 2018 and December 2019 focused first on the needs and then on the potentials of its inhabitants. With 115 flats, the hotel is the largest social housing facility in Wrocław. Many of the tenants ended up in the hotel after evictions, struggling with addictions, mental illnesses, or violence. At the same time, it is a place inhabited by families with children, pensioners or working people who were assigned to social housing many years before. They struggle with vermin, dirt and difficulties due to the presence of addicts and aggressive neighbours. The hotel is made up of small flats with one to two rooms and toilets and kitchens in the hallway.

The research carried out was part of three projects funded by the Municipality of Wrocław in relation to measures taken to improve the situation in the hotel⁵.

² See M. Eliade, *The Sacred and the Profane. The Nature of Religion*, New York 1987, p. 57.

³ Social hotel/halfway house ('hotel socjalny') is a term describing Wrocław's solution, not very popular in the country and in the international context. There are two social hotels in the city, which function is to provide long term accommodation for residents of low income or unemployed. It is kind of the a council flat or social housing, but lower standard. As it is difficult to indicate one proper English equivalent of the Polish name of this institution, two variants have been proposed here. However, in the further part of this study, one of them was consistently used - the 'social hotel'.

⁴ See M. Jędrzejko, "Polskie favele?", [in:] *Wykluczeni. Wymiar społeczny, materialny i etniczny*, ed. M. Jarosz, Warszawa 2008, p. 208.

⁵ Grant implemented by the Made in Brochów Foundation in cooperation with the Association for Critical Education with funding from Wrocław Municipality. Supervision: Kamila Kamińska-Sztark PhD, activities were coordinated by Hanna Achremowicz, research was conducted by Natalia Ługiewicz, Kaja Winniczek and Hanna Achremowicz.

THE HOUSING STIGMA AS A FORM OF SOCIAL EXCLUSION

When analysing social life, Erving Goffman defined a category of stigma. In his dramaturgical model, individuals are actors playing different roles in front of one another. Stigma is primarily a discrediting and compromising attribute. It may refer to the characteristics of an individual, but it may also be group-related, linked to the colour of the skin or one's origin. The perception of it in a given individual results in the attribution of a specific, pejorative, social identity:

The attitudes we normals have toward a person with a stigma, and the actions we take in regard to him, are well known, since these responses are what benevolent social action is designed to soften and ameliorate. By definition, of course, we believe the person with a stigma is not quite human. On this assumption we exercise varieties of discrimination, through which we effectively, if often unthinkingly, reduce his life chances. We construct a stigma-theory, an ideology to explain his inferiority and account for the danger he represents, sometimes rationalizing an animosity based on other differences, such as those of social class⁶.

The stigmatised individual defines his or her identity through this prism. They internalise the stigma and seek acceptance in groups of people with similar characteristics. These groups are characterised by a kind of closure, aversion to and avoidance of the mainstream. Stigma is also a social construct, influenced by history and culture. Discrimination against people affected by it does not have to be conscious, but involves, among other things, stereotyping a given group and viewing its members through the prism of stigma: "Stereotypes are related to stigma in the sense that the reaction of those who stigmatise is not simply a negative reaction (aversion or devaluation of identity), but relies on the assumption that people bearing a stigma are characterized by a particular set of traits (that the stigma entails a particular social identity)"⁷. Mechanisms of exclusion of people carrying a stigma are also hidden ways of discrediting,

⁶ E. Goffman, *Stigma. Notes on the Management of Spoiled Identity*, Englewood Cliffs, New Jersey 1963, p. 5.

⁷ I. Kudlińska, "Stygmatyzacja społeczna jako strategia dyskursywna biedy i jej rola w procesie wykluczenia społecznego", *Kultura i Społeczeństwo* 2012, no. 1, p. 178.

e.g. symbolic violence, exclusion from discourse or such a presence in it that is humiliating. Stigmatisation may, contrary to appearances, also be accompanied by compassion, e.g. towards people with disabilities, those with black skin, the destitute⁸. The experience of stigma affects a person's entire life and can result in or deepen social exclusion.

Interest in social exclusion developed in academic circles in the 20th c. Thinkers who have addressed this issue include e.g. Rémi Lenoir, Max Weber, Georg Simmel, Robert Park, Everett Stonequist, and Michel Foucault⁹. The National Strategy for Social Inclusion for Poland defines exclusion as:

the lack or limitation of opportunities to participate in, influence and benefit from basic public institutions and markets that should be accessible to all, especially the poor. It is a situation that prevents or significantly hinders an individual or group from legitimately performing social roles, using public goods and social infrastructure, accumulating resources and earning income in a dignified manner¹⁰.

Exclusion primarily affects three aspects of life: economic, political and cultural, and makes one unable to participate in them. There are primarily the following causes of exclusion: poverty, unemployment, disability and social discrimination, close to the concept of stigma¹¹. The link between social exclusion and poverty is exceptionally strong:

Poverty, social exclusion and social marginalisation are interrelated phenomena, remaining in causal relations. [...] Poor people have worse access to educational institutions, to well-paid jobs, to health care institutions, to the widely understood zone of consumption, due to both a lack of appropriate social contacts and inadequate financial resources¹².

⁸ See J. Dovidio, B. Major, J. Crocker, "Stigma: Introduction and Overview", [in:] *The Social Psychology of Stigma*, ed. T. Heatherton, R. Kleck, M. Hebl, J. Hull, New York, London 2003, p. 2.

⁹ See F. Nalaskowski, *Ubóstwo a wykluczenie z kultury jako problem dla edukacji*, Olsztyn 2007, p. 21-25.

¹⁰ L. Frąckiewicz, "Wykluczenie społeczne w skali makro i mikroregionalnej", [in:] *Wykluczenie społeczne*, ed. L. Frąckiewicz, Katowice 2005, p. 11.

¹¹ See M. Kozak, "Wykluczenie – rozwój – przestrzeń", [in:] *Wykluczeni*, op. cit., p. 211.

¹² J. Grotowska – Leder, *Fenomen wielkomięjskiej biedy. Od epizodu do underclass*, Łódź 2002, p. 273.

This dependency played a significant role in the case of people living in a social hotel.

Social exclusion and poverty entail many emotional and psychological consequences. The stigma of exclusion triggers a sense of shame and humiliation, which affect a person's performance, diminishing their sense of security, self-esteem and dignity¹³. Stigma may also evoke feelings such as anxiety, fear, insecurity, stress, a sense of uselessness, frustration, and guilt¹⁴. Marginalised groups are disempowered and lack access to decision-making. They have less power than privileged groups and have fewer opportunities to obtain education and professional qualifications, which increases the risk of crises in their lives¹⁵. Referring to research on those experiencing poverty as a form of social exclusion, it can be stated that poor people are sometimes perceived by the public with compassion or else as lazy: "helpless victims, or as a harmful spectre of slackers, idlers and people dependent on social welfare"¹⁶. However, neither of these labels enhances their life prospects. The sense of humiliation is perpetuated by media discourses. In research on poor people, respondents repeatedly pointed to the shame and humiliation caused by the exclusion they experience. As Ruth Lister notes:

Shame and humiliation should not be underestimated. They play an important role in sustaining inequality and social hierarchies. They are extremely damaging to identity, self-respect and self-esteem¹⁷.

The power of dominant groups is to give the excluded identities, to define them¹⁸. These identities can be explicitly pejorative, holding excluded people accountable for their fate. They may, however, be the result of compassion, but still constitute a kind of top-down imposed identity. That is why it was important in this analysis to give voice to the excluded, to acknowledge their agency, to take a participatory

¹³ See R. Lister, *Bieda*, Warszawa 2007 [R. Lister, *Poverty*, Cambridge 2005].

¹⁴ See I. Kudlińska, "Stygmatyzacja społeczna jako strategia dyskursywna biedy i jej rola w procesie wykluczenia społecznego", op. cit., p. 186.

¹⁵ See J. Grotowska – Leder, *Fenomen wielkomiejskiej biedy*, op. cit., p. 60.

¹⁶ R. Lister, *Bieda*, op. cit., p. 153.

¹⁷ Ibidem, p. 148.

¹⁸ See M. Foucault, "Subject and Power", *Critical Inquiry* 1982, vol. 8, no. 4, p. 777–795.

approach, to treat them as social actors on an equal footing. This basis is close to the concept of empowerment in terms of giving a genuine, authentic voice to excluded people¹⁹. This approach was also important in designing the scope of this research, It did not stop at diagnosing problems but described the potentials of the residents and involved some of them in activities integrating them into the local community.

In this particular study, the stigma of exclusion concerned the place of residence and the accumulation of social problems in a given urban space. The concentration of people struggling with life problems in one place may create specific pockets of poverty²⁰. The space of habitation and the individual remain in a dual process of influence. Space influences the individual, but at the same time it is shaped and transformed by individuals according to their needs, which may not necessarily be recognised. Space is the “objectification of what is social and consequently of what is spiritual”²¹. Issues of power, property and social exchange intersect in the space of inhabitation. Space and its form shape a given type of social relations and interpersonal bonds, influence the specificity of a given community²². The relocation of people with similar social problems to a specific spot creates spaces of segregation and social degradation of individuals and groups isolated in a way from the rest of society. Spaces of exclusion can occur both in city centres and on the outskirts of cities. Their creation is caused by poverty and unemployment and this segregation perpetuates and reinforces these phenomena. The dynamics of the concentration of negative social phenomena in selected areas of the city should be of particular interest for policy makers. This issue has been addressed by many scholars, e.g. Kazepov, Haussermann, Hamnett, Sassen, Wilson, Kapphann²³. The research described in this text also concerned the space in which negative social phenomena were accumulated. In accordance with the principle of empowerment, entering the environment of the examined

¹⁹ See R. Lister, *Bieda*, op. cit., p. 212.

²⁰ See M. Kozak, “Wykluczenie – rozwój – przestrzeń”, op. cit., p. 234.

²¹ B. Jałowiecki, M. Szczepański, *Miasto i przestrzeń w perspektywie socjologicznej*, Warszawa 2002, p. 301.

²² See J. Waluszko, “Czy forma miasta ma wpływ na nasze życie?”, *Recykling Idei* 2004.

²³ See P. Sałustowicz, “Miasto jako przedmiot badań polityki społecznej”, [in:] *Miasto jako przedmiot badań naukowych w początkach XXI wieku*, ed. B. Jałowiecki, Warszawa 2008, p. 180–182.

persons consisted in building an atmosphere of trust and giving them a voice in the process of defining their situation.

RESEARCH METHODOLOGY

The research was conducted in a social hotel in Koreańska Street in Wrocław. It is a social housing building, formerly a property of Polish State Railways. At the time of starting the research, it had 130 flats: 13 vacant ones, 2 commercial premises and 115 occupied dwellings (according to the data of the Department of Housing of the City Hall of Wrocław, made available to the researchers on account of the project), on five floors (incl. the ground floor). Apart from the ground floor, on the other floors both toilets, bathrooms and kitchens were shared. Some of them were devastated. There was a lack of data on the actual number of residents, as only some of the tenants were registered. The hotel enjoyed a kind of recognition in the city space due to the scale of social problems occurring in its area: poverty, malnutrition, addictions, mental disorders, and the criminal past of some residents. It was a place frequently visited by the police. Individual tenants, instead of leaving their homes, threw rubbish, including faeces, out of the window into the yard of the Social Integration Centre next door to the hotel. Two videos of reporters' interventions at the hotel can be seen on a popular video site. These dealt with situations where sick and malnourished residents were not receiving basic medical and social care, were unable to move around and lay in infested premises. The block was also the 'protagonist' of one of the election spots in the last local elections, in which the challenger of the current mayor showed the hotel as an example of poor city management and disregard for social problems.

Due to the dire conditions in the hotel, the municipality commissioned a social survey on its premises. The study aim was to find out the needs of the residents and then their potentials. It was based on the interpretative paradigm²⁴ and action research methods²⁵. Traditional

²⁴ See K. Konecki, *Studia z metodologii badań jakościowych. Teoria ugruntowana*, Warszawa 2000.

²⁵ See A. Góral, B. Jałocha, G. Mazurkiewicz, M. Zawadzi, *Badania w działaniu. Książka dla kształtujących się w naukach społecznych*, Kraków 2019; M. Szymańska, M. Ciechowska,

social research methodology assumed data collection without interfering with the research environment. The action research approach has a different form as it assumes acting in the environment and building knowledge based on these actions. Thus, the effect of research is both new knowledge and the effects of actions, which the researcher reflects on²⁶. The researcher is not only looking at the environment from the outside but is aware that he or she occupies a certain place in it. This calls for a greater sensitivity: "The researcher becomes part of the community of the place he is researching, that is, the community of people who create and are created by it. In fact, researchers study but are also themselves researched in the place of their action"²⁷.

The research process in question consisted of three components: a needs diagnosis conducted in the period 1.10.2018-30.11.2018 using in-depth interviews²⁸ and focus interviews²⁹. The next stage was audio-descriptive walks³⁰ conducted in January 2019. The third stage of the research was the diagnosis of potentials, conducted in May-December 2019, combined with animation activities involving residents in their co-creation³¹. The research objective was to diagnose the needs and potentials of the tenants of the block, with animation activities carried out in their living environment.

The overall research process began with gradually getting to know the residents and building an atmosphere of trust. The researchers explored the world of the participants of the research, starting with the building's security guards, then the residents who could be met in the corridor, and finally guided by the residents themselves. A notice was also hung about the research and the possibility to apply. No one

K. Pieróg, S. Gołąb, *Badania w działaniu w praktyce pedagogicznej. Wybrane przykłady*, Kraków 2018; *Czytanie miasta. Badania i animacja w przestrzeni*, ed. K. Kamińska, Warszawa 2017.

²⁶ See A. Góral, B. Jałocha, G. Mazurkiewicz, M. Zawadzi, *Badania w działaniu*, op. cit., p. 13.

²⁷ *Czytanie miasta*, op. cit., p. 32.

²⁸ See S. Kvale, *Doing Interviews*, London, Washington 2007.

²⁹ See G. Kamberelis, G. Dimitriadis, A. Welker, "Focus Group Research and/in Figured Worlds", [in:] *Metody badań jakościowych*, ed. N. K. Denzin, Y. S. Lincoln, Los Angeles, Melbourne 2018, p. 1202-1239.

³⁰ See A. Wieszaczevska, M. Sztark, "Metody animacyjno – diagnostyczne w pracy nad potencjałem rozwojowym i turystycznym miejsc", [in:] *Czytanie miasta*, op. cit.

³¹ See *ibidem*.

availed themselves of this opportunity. Contact was made with organisations working around the hotel and a priest from the local parish. Recognising the environment was part of the research strategy, which involved being with the residents, talking to them, spending time, and having tea with them. It helped to build an atmosphere of openness and trust. Most of the interviews were conducted in the interviewees' homes. Participating in social research was a new and unfamiliar experience for the residents, and the role of the researcher had to be explained. The use of the action research method was not only to investigate the local community, but also to try to activate it. To this end, additional activities were undertaken at the first stage of the research, namely the co-organisation of a campaign to distribute Christmas parcels to residents in cooperation with a local parish. About 60 entries were collected (one entry is one flat, not one person). Two residents of the hotel, acting as volunteers, were involved in distributing the parcels to their neighbours. In the first stage of the study, the diagnosis of needs was based on individual interviews with mothers living in the hotel, young adults and senior citizens (6 interviews). Based on the initial data collected, focus interviews were also organised with mothers, seniors and young adults (3 focus interviews). A total of 18 people were interviewed.

The second stage of the research involved research walks around Brochów conducted using the space audiodescription method³². The aim was to outline the broader context of the residents' perception of the hotel in the local space and to determine the degree of its actual 'visibility' as well as to outline the representation of places important to the people surveyed. The walks involved a blindfolded researcher who was guided by a person describing the space not visible to the researcher. Four interviews were conducted: two with people who live in the hotel and two with local activists who work in its surroundings.

In the third stage of the research, some residents were involved in activation activities. The methods made use of art, creativity and encouraged the use of imagination. These were:

(a) Cognitive maps based on the urban planning concept of Kevin Lynch³³. It is a study involving the collection of data on the spatial distri-

³² Ibidem.

³³ See K. Lynch, *The Image of the City*, Cambridge, London 1960.

bution of phenomena, allowing us to recognise the causes of individuals' behaviour in space and to learn the values attributed to its elements. During the interview, respondents make a map of their neighbourhood or city, marking valuable elements, important elements, places frequented and known, based on Lynch's classification of spatial elements³⁴:

- paths – channels used by the subjects;
- edges – lines which are not roads but are rather barriers and discontinuities in space, e.g. moats, railway embankments, walls, etc.;
- districts – parts of the city, areas recognised by the resident as distinctive, having some common element, e.g. neighbourhoods, parks;
- nodes – strategic points in the city, e.g. crossroads, bus stops, road intersections;
- landmarks – points of reference, usually concrete structures, buildings, used by residents to find their bearings within space.

Lynch believed that people create a cognitive image of the city on the basis of stimuli received from the environment. For residents, the most important elements of the environment are places that are needed, useful, and perceived through the prism of their individual experiences. The purpose of creating a map is to show the individual resident's perspective on the world around them³⁵. The research conducted in the social hotel used the multi-layered mental map method³⁶. It is also based on the residents' personal experience and is made on transparent film, based on a simple plan of the analysed space. The residents marked the elements of K. Lynch's space on it using different symbols. The overlapping transparencies show a broader picture of the conceptualisation of space by the group of residents surveyed. Twelve maps were collected with accompanying interviews.

b) A method of collecting memories called "I Remember", a reference to George Perec's *I Remember* and Joe Brainard's *I Remember*³⁷. The author wrote down memories related to his life over many years and arranged

³⁴ Ibidem, p. 47–48.

³⁵ See M. Stettner, "Wizja miasta według społeczności Kątów Wrocławskich", *Architecturae et Artibus* 2016, no. 1.

³⁶ See A. Wieszaczevska, M. Sztark, "Metody animacyjno – diagnostyczne w pracy nad potencjałem rozwojowym i turystycznym miejsc", op. cit., p. 241.

³⁷ G. Perec, *Pamiętam, że. To, co wspólne I*, Kraków 2013, p. 7 [G. Perec, *I Remember*, transl. P. Terry, Boston 2014].

them into strings of sentences. For example: "I remember that my first bicycle had tube tyres"³⁸. These were not individual memories, however, but "small crumbs of everyday life, things that people of the same generation witnessed, experienced and shared in one year or another"³⁹. The research method based on this concept, therefore, involves collecting memories that are part of a collective identity, yet tend to get forgotten due to their intangible nature. This method was adapted in Poland and used by other researchers⁴⁰. In the course of the activities described in this report, 58 memories of the residents of the hotel and its surroundings were collected.

c) Ethnographic diaries - an important element of the search for potentials was also the creation by the researchers of self-analyses in the form of research diaries, which would allow them to reflect on their own actions and experiences⁴¹. These were based on the concept of ethnographic research⁴². Three female researchers working in the hotel made diaries while conducting the research process.

The above methods were combined with projects meant to activate the residents, stemming from the specificity of research in action. The first element was meetings around a game of ping pong, organised every fortnight on Saturdays (except holidays). During these events it was possible to have a coffee, play ping pong or table football, rent board games or play them on the spot. The meetings were mainly attended by people who were invited individually, despite the fact that a poster about the meetings was put up in the hotel. Another activating element was individual visits to the residents' homes and inviting them to events organised at the nearby Social Integration Centre, e.g. a lecture on getting out of debt. The relationships built in the course of the research made it possible to involve several residents in the co-organisation of the community event 'Neighbourhood Barbecue'. The event was initiated by volunteers working at the hotel. Active residents

³⁸ Ibidem, p. 41.

³⁹ Ibidem, p. 127.

⁴⁰ See Wrocław: *Pamiętam, że*, ed. J. Bierut, K. Pęcherz, Wrocław 2015; *Dolny Śląsk: pamiętam powódź*, ed. G. Czeakański, Wrocław 2017.

⁴¹ See *Czytanie miasta*, op. cit., p. 21.

⁴² See M. Angrosino, *Doing Ethnographic and Observational Research*, Los Angeles, Washington 2007.

helped to staff the event, carry tables, prepare food, and invite other residents. Their input was mentioned on a poster promoting the event. This was to counter the stigma of a hotel resident. The event was very popular with other Brochów residents and the fact that the social hotel residents co-organised it did not 'deter' other participants. The hotel residents themselves also participated, which provided a space for social integration.

THE NEEDS

The diagnosis of needs was based on William I. Thomas's classification of needs (wishes). Due to the characteristics of the hotel space and the fact that the community is affected by many problems, a non-hierarchical classification was intentionally chosen⁴³. Thomas distinguishes between the following needs (wishes): recognition, new experience, response (friendship/reciprocity) and security⁴⁴. In the course of the interviews, the residents were encouraged to talk about their lives: how they feel about their place of residence, what neighbourhood/family relations are like, do they feel safe, what they would like to change, what new experiences they would like to have.

In the diagnosis carried out, the needs for security and recognition came to the fore. Both are closely connected to the stigma of living in that place. The priority theme was that the people interviewed did not feel safe in their homes. Some of their neighbours, under the influence of alcohol and drugs, were instigating brawls. There were also aggressive dogs roaming the hotel premises. In winter, homeless people lived there. Tenants said: "(Respondent 6) It is impossible to live here. Stench, drunkenness, worms. [...] Even [the son] is afraid to go outside alone. [...] At night we are afraid to sleep. There are burglaries". Fear for their own and their family's safety was based on personal experiences held by all interviewees, e.g.: "(O.b. 11) There was a moment they would run around here with axes and we called the police, who said: 'Koreańska Street? Really? Then maybe there will be one dead body'". Analogous narratives

⁴³ See A. Maslow, *Motivation and Personality*, New York 1970.

⁴⁴ See C. Colyer, "W. I. Thomas and the Forgotten 4 Wishes: A Case Study in the Sociology of Ideas", *The American Sociologist* 2015, vol. 46.

emerged in the group interview with mothers: “(O.b. 2) A few years ago I had a hole made in my door, by stoners or drunks, they knocked on the door, it just fell on us, my father was beaten, I remember then I ran for the security guards, and the security guards told me to call the police”; “(O.b. 8) Even at night you can be afraid to go to the toilet. And some people empty themselves into a bucket. I, for one, do not know how to do in a bucket”. Another resident talked about his own interventions in emergency situations:

(O.b. 9) I once had to rescue a lady, because a guy came to the first floor, broke through that first front door, all covered in blood and he was jumping there with his hands. So I just grabbed him and laid him down [...].
Researcher: Right, was he a man from here? (O.b. 9) It turned out that he was descending the stairwell and got the wrong door.

Another element that disturbed the residents’ sense of security was the number of bugs and insects in the building. This problem was raised in every single interview. During visits to the hotel, it was possible to see cockroaches walking on the doors and walls both in the hallways and in some flats, or insects stuck to adhesive tape, with which some residents secured doors and windows. Their presence was part of everyday life in the hotel.

Researcher: Why cannot you open the window? (O.b. 18): Because bugs come in through windows when it gets dark. [...] They also get in through broken sockets. (O.b. 15): They also hide through extension cords. I’m already so oversensitive that I go and check everywhere.

The problem with exterminating insects was one of the main topics of discussion. It involved the need to carry out simultaneous fumigation in all the premises, and some residents would not agree to this. Residents looked on their own for different ways to fight insects. On a daily basis they used sprays, socket plugs and duct tape. There was even a special rack in a nearby shop with various insect-killing products due to the demand generated by the hotel residents. Apart from the presence of vermin, the state of hygiene in some of the flats and common areas

had a negative impact on the sense of security of the respondents. The respondents narrated:

(O.b. 14): There is no air to breathe here because of this stench. (O.b. 13): When one lady comes here to cook, we all run away. She goes to rubbish bins, markets, where people throw away things; she brings it and then cooks it. And there are children living here.

Seniors, on the other hand, spoke about the deterioration of their health due to the sanitary situation in the hotel:

(O.b. 13): There is no sanitary inspection here. (O.b. 11): Here what they did was they replaced the pipes because I got bacteria. And they started to do the cleaning, to replace the pipes, because I found myself in hospital. [...] (O.b. 14): It is all because of these walls. I moved here out of poverty, not out of drunkenness, and I was healthy. And every year it gets worse and worse.

The consequences of insecurity were felt not only by residents. The interviews conducted with security guards and cleaning ladies at the hotel show that they, too, feared the transfer of insects to their own homes and therefore limited contact with some residents to the bare minimum. In addition to the sanitary condition of the building, some residents also drew attention to leaking and non-tight windows, dampness and fungus on the walls. The problems mentioned by the residents could be seen during visits and inspections of the hotel. The hotel was in need of renovation, there was an unpleasant stench, worms were walking on the walls, the doors to some flats were open – people under the influence of alcohol could be seen living there among gone-over food, worms and dogs. In the first stage of the research, it was also possible to meet residents struggling with the problem of malnutrition or lack of medical assistance. Thanks to the involvement of several organisations and the Municipal Social Assistance Centre, these problems were gradually addressed after the first stage of the research.

The deplorable conditions in the hotel and the attendant problems were the reason why the second category of needs, of recognition, was significantly reflected in interviews with the tenants. This topic was

raised spontaneously during the interviews. Residents admitted that living in a social hotel is a stigma which greatly affects their social status and is a reason for shame. As one Respondent (7) said “Half the family don’t know I live here. It is such a shame”. Respondents mentioned opinions they heard on the estate, at school, in the workplace and on the bus which has a terminus next to the hotel. One Respondent (10) said:

I have these situations at work for example. My colleagues say that they saw this hotel on TV, that there is so much vermin and so many different things. But they don’t know that I live in this building. Because I just feel stupid. [...] I won’t say that I live here, because I would probably blush and wouldn’t go to work [...] I’m ashamed, because I have a job and have to be ashamed, otherwise I would end up on the street. They don’t need people from such buildings there. That’s what my boss said. She also doesn’t know that I live in such a building. I would lose my job if she found out.

The interviews with mothers living in the hotel demonstrated that the stigma of living in a hotel affected not only adults but also children, who faced teasing from their peers: “my [daughter] is being finger-pointed and her friends don’t want to come here, she goes to her friends and her friends’ parents do not allow them to come here. But it is not my fault that I got this social housing (O.b. 1)”. Another respondent recounted similar teasing: “someone says that you live here and that there is a mess, poverty and drunks walking around [...] it is hard to explain this to a child. After all I am not different, I do not walk around dirty, in shabby clothes – I have everything I need, and yet I am different from other children (O. b. 2)”. The mothers surveyed also mentioned the fact that they and their children are subject to extremely close scrutiny in terms of their clothing, hygiene and behaviour. In the housing estate environment, they can astonish the social worker by showing them they are clean and sober and their children are well-groomed.

Residents noted the injustice of being treated as a homogenous community of the block; in the social sense they experience stigma. Yes, the hotel was inhabited by people who were deeply socially maladjusted, who grossly neglected hygiene and who had substance abuse issues. On the other hand, the hotel was inhabited by families and tenants who cared about hygiene, fought vermin and worked. However,

the stigma of inhabitation there affected everyone, both in terms of negative identity (residents are drunks) and sympathy, which despite good intentions perpetuated stigma and a sense of shame. Residents felt excluded from the activities of the local environment, they were not informed about cultural events, e.g. there were no posters hung in their block about the cultural and activist offerings taking place in the immediate neighbourhood:

they don't inform us about such things ... The people from here, those residents, perceive us very badly; we are the worst pathology, they call us that, but they don't know that there are normal families living in this building, normal mothers who work, take care of their children and are not pathological, they shouldn't judge us like that, and they measure us by one measure and have never invited us to such meetings (O.b. 1)

– That's right (O.b. 2)

– never, never (O.b. 3)

– this is the first time... at all someone wanted to come to us from there to talk to us about such things. Nobody talks to us about such things, about how we feel (O.b. 1).

The perception of the hotel as an extremely dangerous place meant that couriers and pizza delivery men would not enter the premises, but would call residents to come outside to collect their orders. Only the regular postman chose to enter the hotel, yet when he was sick or on holiday there was no substitute.

Despite the generally negative image of living in a hotel, some residents mentioned that the hotel was clean and modern when they moved in. It was also of value to them that they had housing at all. The theme of the positive aspects of hotel living was explored in the third stage of the research.

Another need in William I. Thomas' classification is the desire for response (friendship). It is a need for reciprocity, it involves the desire to give and receive positive feelings in relationships with other people. From the collected research material emerges a picture of a hotel, where,

on the one hand, some neighbours generate problems, but on the other hand, each of the respondents had their own neighbourhood support group, consisting of people with whom they spend their free time and on whose help they can count.

Researcher: When you need a glass of sugar, what then? (O.b. 2) – we go to a neighbour, a friend. You run out of pampers, you go to your neighbour. (O.b. 1) – you can always get help. (O.b. 2) – or you can just go out in the corridor, gossip, drink coffee.

The specific design of the hotel (tiny flats and common areas) generated and enhanced neighbourhood life. Many people met for a cigarette in the hallway or in the kitchens to cook together. Neighbours with cars helped those who have none and gave them a lift. Another form of help was walking the neighbours' dogs. One resident walked the dogs of neighbours, especially the older ones, free of charge, which earned him the nickname 'Dog Dad'. Other respondents talked about the cleaning they do for the elderly or helping with shopping. Residents also lend money to each other. Neighbourly help could be observed during the preparation and enrolment of Christmas parcels, where neighbours reported elderly people who could not enrol themselves. Every week, the Salida Foundation distributed soup to the residents in the vicinity of the hotel. Some respondents walked to get a meal for ailing or even drunken neighbours who were unable to take care of it themselves. Residents also showed potential for collective action on vermin. One resident initiated the collection of signatures on a letter to the administration for fumigation, which, thanks to a joint intervention, took place shortly before the study began.

The last need in William I. Thomas's classification is the need to gain new experiences: development, change, surprise. For the respondents, answering the question about the need for new experiences was by far the hardest. Their first instinct was to talk about the need for a change of dwelling as the only new experience they would be interested in: "(O.b. 1): What would I like in my life to be new? For a woman to come to me today and say: you can pack your things, you got another flat". Most of the interviewees observed they are not looking for other ways to develop or spend their free time than the ones they know so far: walking, watching TV, talking to their neighbours. After a conversation

with the researcher, the residents indicated potential forms of activities in the afternoon which would interest them: making the nearby Social Integration Centre available for neighbourhood meetings, a senior citizens' club, a Municipal Social Welfare Centre (MOPS) employee or a lawyer on duty - during the research one could observe the 'document illiteracy' described in the literature⁴⁵ and a problem with debt. Residents found it difficult to identify potential development paths and leisure activities. In the recommendations concluding the first stage of the research it was therefore pointed out that it is vital to offer animation activities, but with the assumption that this offer may initially meet with a lack of interest. Individual animating and inviting was a necessary form of activating a community, in which no active leisure habit was observed. Some of the activities could also be carried out on the premises of the hotel, which would eliminate the need to 'take out' the residents. Other needs for change mentioned by the residents were the renovation of the building, deworming, the opening of a common room with a TV and the establishment of a group of volunteers who could help the elderly.

The needs diagnosis completed the first stage of the research and was the basis for recommendations to design activities in the hotel. The data collected showed that the residents of the hotel were highly affected by the stigma of social exclusion due to their place of residence and inactivity in life. Their need for security and recognition was disturbed. In the following year, the Municipal Social Welfare Centre responded to many of the residents' needs. A group of volunteers started to work around the hotel. The Municipality of Wrocław took action to integrate various projects, to consider renovation and effective disinfection. The parish continued its activities in the hotel area. At the research level, the next actions were not only to describe the negative aspects of hotel life, but to look for the potentials of the inhabitants and to involve them in animation activities.

CONCEPTUALISING SPACE

The second stage of research involved audio-descriptive walks. This research extended the field of interest beyond the residents themselves

⁴⁵ See R. Lister, *Bieda*, op. cit., p. 202.

to people who did not live at the hotel, but worked and lived in the area. The purpose of the walks was to explore how residents perceive the presence of the hotel in the context of their surroundings, i.e. whether it is representative of the estate, 'visible' or overlooked. The course of each walk depended on the researcher. It was the person who led the researcher and spun their story about the hotel area. All the walks started at the hotel but went in different directions. Each person spontaneously described the hotel, but the occupants were quicker to end the story and go to other parts of the housing estate. They did not want to go inside and describe it and cut the topic short. People working in its surroundings were much more willing to talk about it. This fact gains importance in the context of the aforementioned stigma felt by the hotel residents. The tenants avoided its topic by going on to describe other elements of the housing estate, as the hotel was an embarrassing space for them.

Apart from the interest in the hotel itself, each of the interviewees described its surroundings as dangerous. This was influenced by the presence of people under the influence of alcohol or with a propensity for violence. The analysis of the research material also shows that the following common threads emerged in all walks: recognition of the nearby bus terminal as an important and frequented place with untapped potential (which, moreover, generates traffic in the vicinity of the hotel), the presence of the railway tracks and the railway station as a constitutive element of Brochów's identity, the nearby Social Integration Centre as a place friendly and open to residents (a place where residents of the hotel could spend time and participate in additional activities organised there). Furthermore, all respondents considered the social hotel as a place not representative for Brochów. Despite the great importance that the residents of the hotel themselves attached to the sense of stigma resulting from living there, they did not consider it to be an important place for other people in Brochów. In the narratives conducted during the walks, the interviewees stated that the hotel is known throughout Brochów, but the residents do not consider it in any way as part of the identity of the estate. It is a 'separate' space, bearing witness only to itself and not to the neighbourhood. At the same time, it is not a stigma for Brochów residents who see it as a 'social' hotel, not a 'Brochów' hotel.

POTENTIALS

Elements of diagnosing the potentials of the hotel residents took place to some extent at the stage of identifying their needs. However, some of the conclusions were elaborated on in the third stage of the research. The first method was layered mental maps based on Kevin Lynch's concept. When describing their surroundings, hotel tenants oriented the space primarily around the only large shop on the estate, which they frequented. The oft-travelled routes and intersections led to it or to other service points: a clinic, an ATM, a pawnshop, and a smaller shop. Another important landmark was the nearby bus terminus in Brochów, on Chińska Street. It is a kind of 'exit' from Brochów, towards other service points or to visit family or friends. The boundaries of the mental world were determined on the one hand by the railway tracks, a landmark of the housing estate, and on the other hand by individual preferences. All interviewees pointed out the lack of 'non-commercial' community landmarks, meeting places, squares, social space 'agora'. Tenants marked their house as a landmark, but often only after drawing the aforementioned large shop. The maps presented a surprisingly similar picture of their surroundings. Their analysis showed that the respondents spend little time outside the hotel and then they mainly go to the shop or do some errands. They don't meet other residents of the housing estate but rather go outside to meet other people. The interviews accompanying the mapping exercise demonstrated that this is related to the stigma of residence; the tenants are more 'from the hotel' than 'from Brochów'. A case in point was a female resident who refused to draw a map of the neighbourhood because despite living in the social hotel for many years, she still perceives herself as living in Psie Pole and not in Brochów. They do not get involved in the life of the neighbourhood; some did not even bother to draw on the map the Social Integration Centre closest to the hotel. The fact that the major landmark on the estate is a big shop can be interpreted as a utilitarian approach to shared spaces. Their imaginary world is focused on basic needs.

The second element of the research was the collection of memories using the "I remember..." method, referring to the social memory of the housing estate. A very warm and positive picture of the housing estate emerges from the 58 collected memories. References to the

rural or small-town style of Brochów were the most frequent. The respondents reminisced: “I remember that it was a quiet village, a separate town”, “Brochów felt a little bit like a small town, a small market square”. Respondents also spoke about the positive atmosphere they remembered for a long time, e.g. “I have always associated Brochów with peace! I have lived here since the 1980s”. The collected memories also showed an image of transformation from a small ‘town’ or ‘village’ into an urban area, which is expanding and changing its identity with the increasing number of inhabitants, e.g. “I remember that Brochów has always been a nice district, which is expanding, there are more and more people”, “I remember that there was a lot of greenery, and now it is disappearing, because of the blocks they are building everywhere”. Residents also mentioned the swimming pool, dancing, lots of greenery, Roma culture, proximity to trains and railway infrastructure, and the presence of a large hospital. Only twice did they mention that the estate was, in their perception, dangerous: “I remember that when I lived in Brochów I was very scared because it is supposedly a bad neighbourhood. Outside the hotel it is ok”, “I remember that there are a lot of people, a lot of noise, good fun, but you are not allowed to go out after 10 pm”. Reference to the hotel appeared in only one quoted memory. The research was conducted among both the tenants of the hotel and other Brochów residents. Both groups described the housing estate in affectionate terms. Despite the context in which the research was conducted (near the hotel, during an event co-organised by its residents), other Brochów residents did not refer to the hotel in any way, did not treat it as a space requiring comment, a meaningful element. The stigma of habitation was only visible in conversations with its tenants, and it is very pronounced in this group. The gathering of memories was accompanied by a neighbourhood barbecue, during which some residents of the hotel had the opportunity to integrate with their neighbours from the housing estate. Participating in this kind of mass event was a new experience for the hotel residents, and the positive course of this event can certainly be pointed out as one of their potentials. Several of them helped in its organisation and many participated in the fun. For the hotel tenants it was an opportunity to see that they are part of the estate, one of their neighbours, without being marked as living in the hotel, without its stigma.

The third element of the research was the researchers' self-analyses via ethnographic diaries. They pointed out the greatest potentials that they saw in the residents as a result of their observations. The first of these was neighbourly relations and helpfulness. Elements of this resource were already visible when diagnosing the needs of the residents. All the researchers pointed to the potential of the residents as neighbours who help one another with shopping, cleaning, bring food, walk one another's dogs, defend themselves when necessary, and are able to act together. A second important potential was the ability to create an atmosphere of warmth and intimacy, despite the difficult living conditions in the block and the presence of many alcohol addicts with numerous social problems. Some of the research took place in the kitchen while the residents were cooking together. The researchers described their feelings such as: "I felt like my grandmother in the kitchen" or "You can sit down and chat. Like dorm mates, each came out of their own room". The researchers also wrote about experiencing anxiety and treating the hotel as an unsafe place, anxiety about bringing vermin into their own homes and difficulties arising from the ambivalent attitude of some of the residents towards the researchers (cancelling meetings, interviews). Despite their initial unease with conducting research in the hotel, they did not experience unsafe situations there. Researcher 3 wrote: "I remember the first time I entered the hotel with people working in the area assisted by their husbands because they themselves were afraid to enter. I can understand that". Researcher 1 had a similar experience: "I was not afraid to walk around the hotel. My husband was afraid for me". The hotel was regarded by the residents as a dangerous place and certainly the incidents they described should not have been underestimated. On the other hand, once they had entered its environment, the anxiety about safety decreased in importance and many positive manifestations of the local environment could be seen. Some residents described their experience of living in the hotel favourably, appreciated the neighbourliness and the closeness of their friends. Respect for the interviewees requires that both the difficulties they described and the positive elements of their life which they themselves perceived and named be indicated.

A summary of the third stage of the research brings the following conclusions. The residents' helpfulness and neighbourhood culture should be identified as their greatest potential. The tenants know and

are able to help one another and act together. Although the hotel is neglected and affected by many social problems, some of the residents are able to create an atmosphere of home and hospitality. The interviewed residents also had positive and warm memories related to Brochów. They described it as a small town which had grown a lot in recent years. Few people spoke negatively about the immediate neighbourhood. The interviewed residents saw the hotel as a less important place on the map of Brochów; they do not mention it often and it is not a kind of 'hallmark' of the neighbourhood. The event integrating the residents of the hotel with their neighbours showed an example of a situation excluding the element of stigma. The stigma is much stronger in the hotel residents themselves than in the local environment, and further integration activities can minimise it. At the same time, continued work for the benefit of the hotel is necessary, coordinated by the Municipal Social Welfare Centre, whose presence and work has brought many positive changes noticeable during the social research.

CONCLUSIONS

This text reports on research in a community affected by exclusion due to living in a social hotel; the tenants did not have many opportunities to have their voice heard or to air their opinions in public. The silence of the excluded may be a form of resistance against an even deeper exclusion resulting from finger-pointing, fixation in a social role and in stigma. The researchers' role is to give them the space for free expression, the right not to exist in social space only as an excluded person, but to show the multidimensionality of their personality, potential and achievements. At the same time, on the ground of research in action, researchers themselves make a self-analysis and examine their own concerns and motivations. The study accounted for here was no different. For the researchers working in the social hotel, the whole process was undoubtedly a major formative experience.

To complete the picture of the research conducted in the social hotel, it is necessary to consider the risk of using the term 'potential'. On the one hand, it refers to the category of empowerment and giving the interviewees a voice, but on the other hand it is possible to enter the

role of a person who, when describing someone's potential, creates an atmosphere expressed in the phrase: "Able yet lazy". This is because we can put an additional burden on the shoulders of the interviewees, who are already heavily affected by fate. The conviction that since they have potential and nothing changes in their lives, it is their fault. The notion of potential thus requires delicacy and awareness that the relationship of working towards the improvement of one's own fate does not depend solely on the individual, but is rather a complex system of variables and correlations. The conclusion of the research may not only be to list the interviewees' potential but also their achievements and successes. More than a year of research at the social hotel saw improvements in the situation of many of its residents. One of the people interviewed initially moved out of it on her own, earning a better flat, which was her dream. Several residents were actively involved in the activities accompanying the project, distributing parcels, and participating in neighbourhood barbecues and table tennis tournaments. The community organised itself around people in need of support. Thanks to the work of many institutions, especially the Municipal Social Welfare Centre, many residents received financial, health (including substance abuse) and legal aid. Vacant flats were bricked up, a day-care centre was opened (one of the ideas for positive change in the diagnosis of needs). Residents saw improvements in the block. At the end of 2019, a neighbourhood meeting was organised for them in the common room, which had been cleaned and prepared by social workers. The tenants came to the meeting in large numbers, integrating with employees of the neighbourhood institutions, researchers, and police representatives. They helped with the preparation and cleaning, bringing chairs from their flats. The work in the social hotel will continue to be carried out by both the residents and the professionals who try to support them to better their living conditions. This road will no doubt contain stumbling blocks and difficulties. From the researcher's perspective, participating in this process has been a challenge as much as a great honour.

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