



# ACTA MISSIOLOGICA

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## THEMATIC FOCUS OF THIS ISSUE:

**A scientific and professional discourse relevant for the post-COVID era focusing on the specifics of palliative care, selected topics from the Christian and Muslim religions, and the consequences of COVID-19**

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The impact of time and communication on professional decision-making regarding patients with advanced lung cancer: Interpretative phenomenological analysis of focus groups with specialist palliative care professionals  
*Audrey Roulston*

Human values and the feel of social and health threats  
*Ivana Olecká, Jiří Pospíšil*

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Investigating the components and symbols of war in Muslim children's literature with emphasis on the Zakaria Tamer's works  
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Digital Content and The Impact of Verbal Commonality On Different Jurisprudential Rulings - an Applied Study  
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The Benefits of Online Counselling in Dealing with the Psychological Consequences of the COVID-19 Pandemic Relevant for the post-COVID era  
*Krzysztof Trębski*

## ACTA MISSIOLOGICA

## Peer-reviewed academic journal

Our mission is to create an international platform for experts engaged in the field of Christian mission and missiology, charity, social and humanitarian development work at the theoretical, research and application levels. The journal has been creating room within this international platform for further specificities covering the aforementioned fields that will produce new relevant findings and interconnections in order to promote the journal more to the widest possible professional community and stimulate a greater interest within it. One such field is international public law with its unique scientific and relevant, direct and close link to international missionary work, and several other relevant aspects from other fields on which the journal focuses. The journal publishes a wide spectrum of articles relevant for education with special focus on assisting professions in the aforementioned areas. This area includes all educational, health, social, legal (especially international humanitarian law, international human rights law, diplomatic law and international treaty law), international organization and spiritual topics connected to the missionary context.

As of Autumn 2020, the journal will be focusing on specialised unique scientific and expert research at the international level, covering all the topics the journal has focused on thus far while also introducing new ones. One such aspect of scientific and expert research that the journal is going to focus on is the support for the family structure and its value in today's society, as well as the promotion of human dignity and value in various essential aspects of life with a view to opening up effective dialogue on various relevant and interesting ideas about non-radicalised Islam, thus also benefiting the Christian environment.

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## EDITORIAL

### Dear Colleagues and Readers of Acta Missiologica,

The period of the COVID-19 pandemic reminded us largely again of great encounter with death. In several scientific and professional aspects within various scientific fields, it has opened up calls for a deeper reflection on comfortable end-of-life care that helps and reassures the person who is dying. The aim is to prevent or alleviate the suffering of the dying person as much as possible and at the same time to improve their quality of life as much as possible during the last time they have left. During the massive and sudden deaths during the COVID-19 pandemic, this comfort of caring for the deceased was affected by many factors and limitations due to the fear of transmitting the viral disease in patients who died. All these aspects have emphasized, much more than ever before, the importance of building the development of care for the dead in general, with various diseases, with an emphasis on viral causes that are life-threatening for those providing such care.

It is the area of palliative and hospice care that has been showing us for several years how the care of the dead is of fundamental and irreplaceable importance. This importance is still urgent and present in today's society, despite pressure to implement euthanasia. Dying, like the birth of a person, is a unique process. The process of dying is not only necessary for every person, but also has its specifics, important phases and meanings that are necessary for a person to be able to reconcile and close their life in peace. The process of dying can often bring rare and unrepeatable enrichment to the dying person's loved ones. However, if we intervene in the process of dying in some artificial way, we may shorten the dying man's suffering, but at the same time rob them of the opportunity to close their life on a mental and spiritual level and make their „departure“ more difficult. The course of the process of dying in its unique reality, which the dying person themselves choose, is important for them, is natural and holds an irreplaceable place. No one is immune to the fear of death and the process of dying. This fear has several components and cannot be prevented or eliminated, not even by the application of euthanasia. Therefore, it is essential to improve the care of the dead at all levels of the human personality as much as possible and to teach people to accompany and assist in the dying process in a variety of ways. From this point of view, it is also very important to include the topic of dying and death more as a normal part of life in society.

Otherwise, there is an increasing risk that the topic of dying and death will, over time, become even more pronounced in relation to euthanasia. Society will completely displace the process of dying and death as a necessary evil that must be gotten rid of quickly, and this process will cease to be perceived as a natural part of the life of every human being, which, like other phases of the life cycle, has its necessary laws.

The intensified fears of dying and death, the weakened emotional, cognitive, behavioural, psychological, social and economic well-being of the global population are also serious far-reaching consequences of the COVID-19 pandemic, with all its limitations.

The current issue of Acta Missiologica focused on relevant research for the international scientific community that addresses important aspects of palliative care, health and social care threats, the challenges posed by the COVID-19 pandemic and needs to be addressed effectively and rapidly. The socio-healthcare as well as the religious spectrums of the Christian and Islamic religions of the topics, examined in this issue, also show the importance of their inclusion and contribution in the post-COVID era in various scientific fields in the form of their proposed applications in real life and new research perspectives. They open up new and deeper dimensions for

connecting with other and diverse scientific fields, with the possibility of favourable results and responses for the international scientific and professional community.

Following its original goal, which the journal Acta Missiologica has set for itself, especially since the spring period of 2020, ravaged by the COVID-19 pandemic: *was that the journal, within its uniqueness and competitive ability, would become even more prominent and related to the international professional community. With this intention, since 2020, within the international platform, it opens up space for diverse and unique, one-of-a-kind specifics with a new and special scientific and relevant direct and close connection to its profile focus.* Another such unique specificity is the study of the field of development of care for the dead in its diverse and interesting aspects with new connections in various scientific fields and with contexts that are new, interesting and inspiring for scientific research and application in practice. Through the mentioned researches, studies and discussions, the mentioned area within the journal will be connected to the spheres, which the journal has been researching for a long time in its profile. In this way, Acta Missiologica will be able to continue to bring new and relevant findings and interconnections in various fields, which do not yet exist and will bring new benefits to the international professional community.

The current edition of the Acta Missiologica opens up new space for new and deeper scientific and professional research, reflections that provide interesting stimuli for relevant scientific discussions, as well as inspiring impulses for the further work of academics and experts working in various scientific and professional fields.

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## THE IMPACT OF TIME AND COMMUNICATION ON PROFESSIONAL DECISION-MAKING REGARDING PATIENTS WITH ADVANCED LUNG CANCER: INTERPRETATIVE PHENOMENOLOGICAL ANALYSIS OF FOCUS GROUPS WITH SPECIALIST PALLIATIVE CARE PROFESSIONALS



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### Abstract

**Background:** Many medical decisions are guided by principles of autonomy, non-maleficence, beneficence, and justice, yet involve uncertainty and ethical dilemmas. It is important to understand what illness, life and death mean to each patient, alongside their values, priorities, preferences, knowledge and expectations regarding treatment and care.

**Methods:** Focus group meetings, conducted with 10 members of a Community Specialist Palliative Care Team in Northern Ireland, who cared for patients diagnosed with advanced lung cancer, were analysed using Interpretative Phenomenological Analysis.

**Results:** Three super-ordinate themes were identified: time, decision-making and communication. Timely referrals for exploratory tests, accurate communication of test results and 'red flag' systems for treatment or services, maximising IT systems, were recommended. Uncertainty, busy clinics, lack of privacy and perceived awkwardness impeded effective communication between professionals and patients. Having a trusting relationship, timely access to accurate diagnostic and prognostic information, competent communication skills, and respect for patient wishes, enabled communication.

**Conclusion:** professionals must build effective, trusting relationships with patients, carers and other professionals. Choices and decisions need to be navigated sensitively and competently. End-of-life care wishes or priorities should be reviewed regularly and documented.

**Keywords:** Palliative care – Lung cancer – Interpretative phenomenological analysis – Focus groups – Decision-making.

### Introduction

Breast, prostate, lung and bowel cancer account for 53% of all new cases of cancer diagnosed in the United Kingdom. Lung cancer is the second most commonly diagnosed cancer in males and females living in the UK.<sup>2</sup> The most common cause of cancer death in the UK is lung cancer in both males and females.<sup>3</sup> In 2015, data indicated that 4,361 out of 14,458 deaths (21%) in Northern Ireland were from cancer, making it the leading cause for death. For both

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2 Cancer Research UK, 2018

3 Cancer Research UK, 2018

males and females, the most common cancer site was the bronchus or lung.<sup>4</sup> Experts agree that smoking is the single biggest avoidable cause of cancer, causing over a quarter (28%) of cancer deaths in the UK.

The statistical link between tobacco and cancer was established more than 70 years ago.<sup>5</sup> In view of this, patients may feel stigma associated with their illness and feelings of regret in relation to their lifestyle choices and smoking behaviours. It is important to acknowledge that the discovery of lung cancer in a lifelong non-smoker can also occur, usually due to passive smoking. According to Lewis<sup>6</sup> a non-smoker being diagnosed can elicit gasps of surprise from peers and misplaced moral outrage. A comparison of the standardised mortality ratios for tobacco related cancers across the District Council areas in Northern Ireland suggest that lung cancer mortality rates are strongly associated with socio-economic deprivation.

Many medical decisions involve uncertainty. Medical physicians may need to make treatment decisions where a patient's diagnosis is not clear and where the outcome of a treatment is uncertain. This uncertainty is more likely where frequency-based probability is not available from epidemiological databases or outcome studies.<sup>7</sup> Furthermore, biases can occur when judging the probability of events such as possible diagnosis and treatment outcomes. In addition to biases associated with judging the probability of events, medical decisions involve evaluating outcomes with respect to the preferences and values of the decision-maker. A typical scenario is where a patient and physician must decide whether the benefits of a treatment outweigh the side effects, or whether the risks of a diagnostic test are worth taking in light of the information it will provide.<sup>8</sup> A well-known example of this type of bias is the framing effect, which occurs where 'survival rates' and 'mortality rates' describe exactly the same information. Decision-making includes weighing up the 'harms' and 'risks'. 'Harms' can be defined as side-effects and the burden of undergoing treatment and 'risks' may be described as situations that can go wrong.

Other aspects of psychological research on medical decision-making explore ethically difficult decisions, guided by principles of autonomy, non-maleficence, beneficence, and justice.<sup>9</sup> However, adherence to these principles is sometimes difficult in the area of palliative care, as beneficence and non-maleficence may conflict when treatment supports life, but causes pain or other side effects. Empirical research can indicate whether the goals implied by these ethical principles are achievable. For example, the principles of autonomy and beneficence imply that patients receive adequate and truthful information regarding treatment alternatives.<sup>10</sup>

4 Northern Ireland Statistics and Research Agency (2015) Statistical Bulletin: Deaths in Northern Ireland 2015. (Belfast: NISRA, May 2015)

5 Mark A. Lewis, "Gain of function: empathy for the uncertain patient with cancer," *Journal of Clinical Oncology* 29, no. 22 (August 2011): 3103-3104, doi/10.1200/JCO.2011.35.1122

6 Lewis, "Gain of function," 3103-3104.

7 Gretchen B. Chapman, and Arthur S. Elstein, "Cognitive processes and biases in medical decision making" in *Decision making in health care*, ed. Gretchen B. Chapman and Frank A. Sonnenberg, (Cambridge: Cambridge University Press, 2000), 183-210.

8 Chapman, "Cognitive processes," 183-210.

9 Thomas Beauchamp, and James Childress, *Principles of Biomedical Ethics* (New York: Oxford University Press, 1989)

10 Joshua Cohen et al., "Bioethics and medical decision making: what can they learn from each other?" in *Decision making in health care*, ed. Gretchen B. Chapman and Frank A. Sonnenberg, (Cambridge: Cambridge

University Press, 2000), 253-266.

11 Fiona Randall and R.S. Downie, *End of Life Choices: consensus and controversy* (Oxford: Oxford University Press, 2010)

12 Laura A. Siminoff et al., "Measuring discord in treatment decision-making; progress toward development of a cancer communication and decision-making assessment tool," *Psycho-oncology* 15, no. 6 (June 2006): 528-540, doi: 10.1002/pon.989

13 General Medical Council. "Consent: patients and doctors making decisions together" (London: GMC, June 2008), paragraph 8b

14 General Medical Council, "Consent", paragraph 31

15 Mental Capacity Act 2005.

16 Gary Steine and Iris Fineberg, "Advance Care Planning in the USA and UK: A comparative analysis of policy, implementation and the social work role," *British Journal of Social Work* 43, no. 2 (March 2013): 233-248, https://doi.org/10.1093/bjsw/bct013

17 Frank J. Brescia, "Philosophical Oncology: Calling on the principle of double effect," *Journal of the National Comprehensive Cancer Network* 1, no. 3 (July 2003): 429-434, doi: 10.6004/jnccn.2003.0036

a patient's mental and emotional ability to make choices due to psychosocial issues associated with illness, such as fear, pain, disfigurement, denial, guilt, anger, avoidance, ambivalence and economic stress.

In cases such as metastatic cancers<sup>18</sup> the physician may adopt a 'paternalistic' decision-making approach regarding the patient's treatment and care, thereby limiting patient participation. In others a 'deliberative' approach<sup>19</sup> may be adopted, which encourages patient involvement in medical care and treatment decisions. This approach was promoted and valued by Good et al.<sup>20</sup> who conducted a mixed methods study with 75 physicians in Boston (USA) and found that when communication and negotiation was effective it led to satisfying management of end of life care and a peaceful death. However, when fraught with misunderstanding or conflict, there was a greater likelihood of irrational decisions or adverse events. Similarly, Ellis<sup>21</sup> advocated for a multi-disciplinary team and a patient-centred approach to the diagnosis, treatment and end of life care for patients with lung cancer.

As a terminal illness progresses, decision-making may be required in relation to the preferred place of care, which could include home, hospital, care home or hospice settings. A number of studies illustrate competing factors that may influence decision-making around preferred place of care: social class<sup>22</sup>; previous experience of health care<sup>23</sup>; availability of family or social support<sup>24</sup>; patient perceptions of being a burden<sup>25</sup>; positive relationships with health care providers<sup>26</sup>; a need for greater control, privacy or autonomy<sup>27</sup>; and communication about preferences.<sup>28</sup>

A number of barriers to effective patient-physician communication or interaction have been identified within the literature. Firstly, there are challenges for physicians who need to inform patients of their health state. In order to facilitate end of life care decision-making, patients

18 Nancy L. Keating et al., "Cancer patients' roles in treatment decisions: do characteristics of the decision influence roles?" *Journal of Clinical Oncology* 28, no. 28 (October 2010): 4364-4370, doi: 10.1200/JCO.2009.26.8870

19 Ezekiel J. Emanuel and Linda L. Emanuel, "Four models of the physician-patient relationship," *Journal of American Medical Association* 256, no. 16 (April 1992): 221-2226, doi:10.1001/jama.1992.03480160079038

20 Mary Jo Good et al., "Narrative nuances on good and bad deaths: internists' tales from high-technology work places," *Social Science and Medicine* 58, no. 5 (March 2004): 939-953, doi: 10.1016/j.socscimed.2003.10.043

21 Peter M. Ellis, "The importance of multi-disciplinary team management of patients with non-small cell lung cancer," *Current Oncology* 19, no. s1: (1 June 2012): 7-15. <https://doi.org/10.3747/co.19.1069>

22 Susan Desharnais et al., "Lack of concordance between physician and patient: reports on end of life care discussions," *Journal of Palliative Medicine* 10, no. 3 (2007): 728-740, doi: 10.1089/jpm.2006.2543 ; Chen et al., "Decisions for hospice care in patients with advanced cancer," *Journal of American Geriatric Society* 51 (June 2009) 789-797, doi: 10.1046/j.1365-2389.2003.51252.x

23 Kathryn McCall and Anne-Marie Rice, "What influences decisions around the place of care for terminally ill cancer patients?" *International Journal of Palliative Nursing* 11, no. 10 (September 2013): 541-547, <https://doi.org/10.12968/ijpn.2005.11.10.19983>

24 Irene Tuffrey-Wijne, "The preferred place of care for people who are dying," *Learning Disability Practice* 12, no. 6 (2009): 16-21, doi: 10.7748/ldp2009.07.12.6.16.c7125

25 Laraine Winterand and Susan Mockus Parks, "Family discord and proxy decision makers' end-of-life treatment decisions," *Journal of Palliative Medicine* 11, no. 8 (November 2008):1109-1114, doi:10.1089/jpm.2008.0039

26 Kelly Stajduhar and Betty Davies, "Variations in and factors influencing family members' decisions for palliative home care," *Palliative Medicine* 19, no. 1 (February 2005): 21-32, doi: 10.1191/0269216305pm963oa

27 Stajduhar and Davies, "Variations," 21-32.

28 Chen et al., "Decisions for hospice care," 789-797; Christina L. Bell et al., "Factors associated with congruence between preferred and actual place of death," *Journal of Pain and Symptom Management* 39, no. 3 (March 2010): 591-604.

need to know that they are dying. As illustrated in one American quantitative survey involving gynaecological physicians (n=327), respondents believed that 97% of patients who are dying realise that they are dying, but stated only 40% of these patients initiate conversations about end of life issues. In contrast, 92% of respondents reported that they initiate end of life discussions with patients. However, not all patients are ready to receive the same depth of information pertaining to their illness.<sup>29</sup>

To promote communication and assist with the necessary transitions, physicians need to present diagnostic information that optimises the patient's understanding and assists them with psychological adjustments.<sup>30</sup> According to a literature review conducted by Back et al.<sup>31</sup> communication should be empathic and help support hope. Hope may be a factor in how information is channelled, blocked or used within the triad. It is most often discussed in terms of the pros and cons of 'false' hope, and located in opposition to the physician telling the patient the truth.<sup>32</sup> Through case studies, Crawley et al.<sup>33</sup> illustrated that physicians need to be aware of how culture shapes patients' values, beliefs and world views, and they need to recognise and be sensitive to situations where the patient's autonomy should be promoted, compared to cultural situations where patient autonomy is subordinate to the power of the family.<sup>34</sup>

These findings illustrate the importance of having skilful and competent physicians who need to facilitate timely and sensitive conversations with patients and family carers regarding end of life issues.<sup>35</sup> Secondly, physicians need to know the best course of action regarding treatment and care, communicate openly with the patient and family, and avoid adopting a paternalistic approach to end of life care decision-making.<sup>36</sup> Thirdly, findings from a literature review on communication about cancer near end of life conducted by Back et al.<sup>37</sup> identified that all members of the decision-making triad need to interact openly whilst making the transition from curative to palliative care, grieving multiple losses, and preparing for death and dying.

29 L.M. Ramondetta et al., "Approaches for end of life care in the field of gynaecologic oncology: an exploratory study," *International Journal of Gynaecological Cancer* 14, no. 4 (August 2004): 580-588.

30 Tang et al., "Patient awareness of prognosis, patient-family caregiver congruence on the preferred place of death, and caregiving burden of families contribute to the quality of life of terminally ill cancer patients in Taiwan," *Psycho-oncology* 17, no. 12 (December 2008): 1201-1209, doi: 10.1002/pon.1343

31 Anthony L. Back et al., "Communication about cancer near the end of life," *Journal for American Cancer Society* 113, no. 7 (October 2008): 1897-1910, doi: 10.1002/cncr.23653

32 Jennifer Beste, "Instilling hope and respecting patient autonomy: Reconciling apparently conflicting duties," *Bioethics* 19, no. 3 (June 2005): 215-231. doi: 10.1111/j.1467-8519.2005.00438.x; Christy Simpson, "When hope makes us vulnerable: A discussion of patient-healthcare provider interactions in the context of hope," *Bioethics* 18, no. 5 (August 2004): 428-447, <https://doi.org/10.1111/j.1467-8519.2004.00408.x>

33 LaVera M. Crawley et al., "Strategies for culturally effective end of life care," *Annals of Internal Medicine* 136, no. 9 (2002): 673-679, doi: 10.7326/0003-4819-136-9-200205070-00010

34 Tang et al., "Concordance of preferences for end of life care between terminally ill cancer patients and their family caregivers in Taiwan," *Journal of Pain and Symptom Management* 30, no.6 (December 2005): 510-518, doi: 10.1016/j.jpainsymman.2005.05.019

35 Ramondetta et al., "Approaches for end of life care," 580-588 ; McCall and Rice, "What influences," 541-547 ; Susan Deschepper et al., "Lack of concordance between physician and patient: reports on end of life care discussions," *Journal of Palliative Medicine* 10, no. 3 (2007): 728-740, doi:abs/10.1089/jpm.2006.2543

36 Carole Willard and Karen Luker, "Challenges to end of life care in the acute hospital setting," *Palliative Medicine* 20, no. 6 (September 2006): 611-615, doi: 10.1177/0269216306071064.

37 Back et al., "Communication about cancer," 1897-1910.

**Methods**

The aim of this study was to contribute to the body of knowledge in relation to end of life care decision-making by health and social care professionals working in community specialist palliative care. The objectives of this study were:

- To understand the main factors influencing decision-making for health and social care professionals
- To explore how health and social care professionals approach and facilitate decision-making in end of life care
- To inform end of life care policy and to improve service delivery

**Design**

Focus groups allow researchers to obtain consensus on relevant issues, draw a larger sample into a smaller number of data collection points, and enable the researcher to gather data from naturally occurring groups, such as a MDT. A focus group methodology enabled a more natural environment for professionals already working as a team within palliative care, to explore the challenges in facilitating decision-making.<sup>38</sup> However, potential hierarchies or patterns of behaviour or communication within the team could transfer to how participants interacted and culturally expected views may be expressed by participants, rather than privately held views.<sup>39</sup>

**Recruitment**

Senior Management approached health and social care professionals from one Health and Social Care Trust area within Northern Ireland, who offered community palliative care services to patients with lung cancer. Upon verbal consent, all staff were offered a participant information sheet and reminded that participation was voluntary. The recruitment of professionals, or data collection did not proceed until full ethical and governance approval was obtained (ref: ORECNI, 11/NI/0037). Ten Health and Social Care Professionals working in the multi-disciplinary team consented to participate in at least one focus group meeting. Participants consisted of medical (n=2), nursing (n=4), allied health (n=3) and social work (n=1) professionals. Of the ten, the majority were female (n=7), aged 30-50 (n=8), protestant (n=7), White British (n=9) and had specialised in palliative care for 6 to 8 years (n=6).

**Data collection**

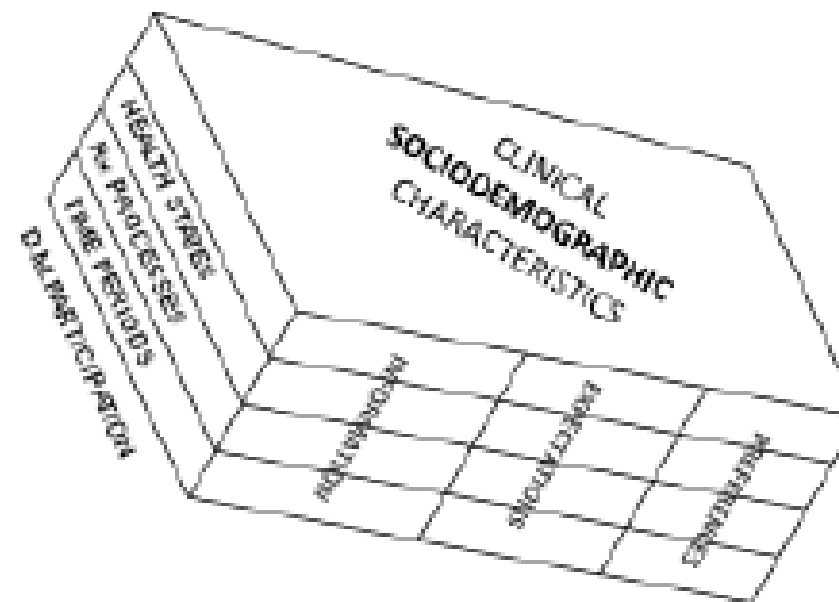
A focus group interview schedule was designed and informed by the conceptual framework proposed by Llewellyn-Thomas.<sup>40</sup> The framework incorporates the clinical context of decision-making; maps interactive elements that characterise decision-making; and takes account of how decision-making alters over time, based on patient experiences of illness and interactions between patients, physicians, family carers and institutions; and helps to explore information-seeking behaviours, preferences and treatment decision-making. It consists of three facets (intrapersonal, interpersonal and extrapersonal) and seeks to provide a simplified and abstract view of a complex reality by representing the decision-making participants as members of a triad (patient, physician and family carer), and coherence to their attributes and relationships.

38 Richard A. Krueger and Mary-Anne Casey, *Focus Groups: A practical guide for applied research* (Third Edition), (London: Sage Publications, 2000)

39 Alan Bryman, *Social Research Methods* (Fourth Edition), (Oxford: Oxford University Press, 2012)

40 Hilary A. Llewellyn-Thomas, "Patients' health-care decision making: A framework for descriptive and experimental investigations," *Medical Decision Making* 15, no. 2 (June 1995): 101-6, doi: 10.1177/0272989X9501500201

**Figure 1**  
Intrapersonal 'Rubic's cube' used to illustrate the main influences upon decision-making at an individual level<sup>41</sup>



Key: Rx represents treatment; DM represents decision-making

The first face of the 'Rubic's cube' refers to the four aspects of a health care decision problem that may be presented to a patient: health state; treatment process; time and participation in decision-making. The second face refers to the three perspectives that an individual may bring, such as the patient's information, expectations and preferences. The third face refers to the unique clinical and socio-demographic characteristics of the patient, which will influence decision-making. Each patient's clinical profile is unique to them, as are their demographic characteristics and their psychological and psychosocial needs, which all need to be considered during the decision-making process.

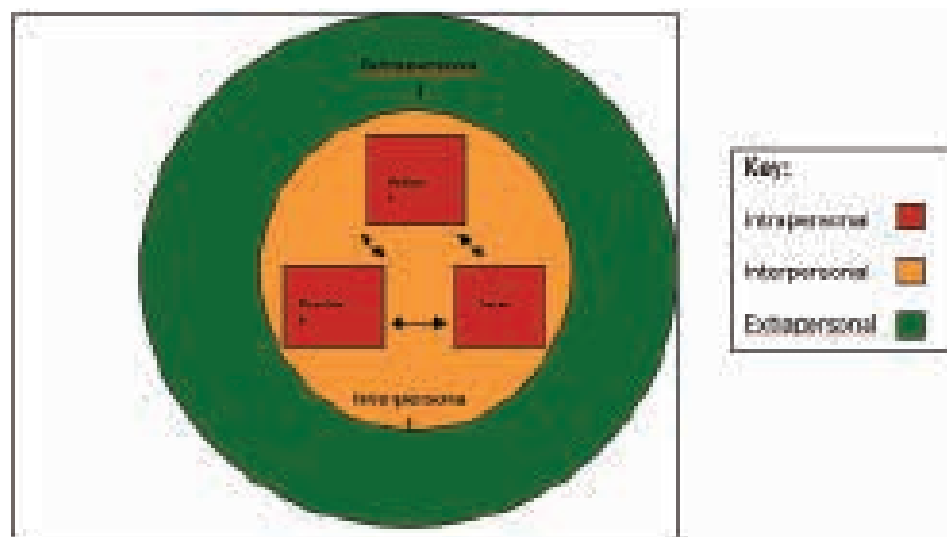
According to Llewellyn-Thomas<sup>42</sup> the interpersonal interaction that occurs between the patient, physician and carer during the decision-making process, could be represented by a sphere enclosing the triad (see Figure 2). A second sphere represents the Extrapersonal, which depicts what is happening in the socio-political world when an individual interacts with others represented by the triad, and considers decision-making. Research in this area may involve examining the influences of institutional traditions, customary referral patterns, resource accessibility, and constraints on the triad's acquisition of information, expectations, preferences, and consequent decision behaviours, based on culture, economy or power dynamics.<sup>42</sup>

41 Llewellyn-Thomas, "Patients' health care," 101-6.

42 Llewellyn-Thomas, "Patients' health care," 101-6.

A pilot study conducted with professionals during a research trip to Bolivia.<sup>43</sup> For the study in Northern Ireland, each focus group meeting lasted 60 minutes, they were audio recorded using a digital voice recorder, and were professionally transcribed verbatim.

**Figure 2**  
**Interpersonal and Extrapersonal spheres influencing the decision-making process**  
 (Source: Llewellyn-Thomas, 1995: p. 104)



**Data analysis**

Whilst focus groups are a common choice for collecting data in qualitative research, only a small number of studies have used IPA to analyse focus group data.<sup>44</sup> According to Flowers et al.<sup>45</sup> the group dynamics of their sample added an opportunity for experiential reflection, which added to their analysis. The four stages of Interpretative Phenomenological Analysis (IPA)<sup>46</sup> were used to analyse the data. In keeping with IPA, contextualisation and numeration were considered when exploring the emergent themes across the transcript and participants were assigned pseudonyms. Participants were asked to discuss the following aspects of clinical practice: ethical and clinical decisions around treatment and care of lung cancer patients; how

43 Audrey Roulston and Tommy Haynes, "Bolivian Health and Social Care Professionals' experiences of decision making in oncology and palliative care," *British Journal of Social Work* 45, no. 4 (June 2015): 1277-1295, <https://doi.org/10.1093/bjsw/bct186>

44 Paul Flowers et al., "Community, Responsibility and Culpability: HIV risk management amongst Scottish gay men," *Journal of Applied Social Psychology* 10, (August 2000): 285-300, [https://doi.org/10.1002/1099-1298\(200007/08\)10:4<285::AID-CASP584>3.0.CO;2-7](https://doi.org/10.1002/1099-1298(200007/08)10:4<285::AID-CASP584>3.0.CO;2-7); Paul Flowers et al., "Re-appraising HIV testing among Scottish gay men: The impact of the new HIV treatments," *Journal of Health Psychology* 6, no. 6 (December 2001): 665-678, Doi: [10.1177/135910530100600605](https://doi.org/10.1177/135910530100600605); Elizabeth A. Dunn and Ethel Quale, "The impact of iatrogenically acquired Hepatitis C infection on the well-being and relationships of a group of Irish women," *Journal of Health Psychology* 6 no. 6 (December 2001): 679-692, doi: [10.1177/135910530100600606](https://doi.org/10.1177/135910530100600606)

45 Flowers et al., "Re-appraising HIV testing," 665-678.

46 Jonathan A. Smith et al., *Interpretative Phenomenological Analysis: Theory, method and research*, (London: Sage Publications, 2009)

decision-making for end of life care is facilitated or influenced; what role professionals play in exploring the patient's preferences; and any gaps whilst providing holistic care to palliative patients. The super-ordinate themes identified from the focus group findings were; time, decision-making and communication.

**Limitations**

Findings are not generalizable as data were collected from one Specialist Palliative Care Team, in Northern Ireland. Focus group findings were not triangulated with patient experiences and responses would have been influenced by pre-existing dynamics and the hierarchy of relationships within the multi-disciplinary team.

**Findings**

**Time**

With reference to numeration, time was the most dominant theme, which overlapped with other emergent themes. Given the unforgiving and life-limiting nature of advanced lung cancer time was respected as a precious commodity, particularly in relation to obtaining information that would promote patient empowerment or self-determination in decision-making and inform physician decision-making regarding interventions that could potentially maximise life expectancy and quality of life. However, time linked to other extrapersonal and interpersonal domains, such as interprofessional and inter-agency working, referral processes and communication. When there was a strong suspicion that a patient's symptoms needed formally investigated, the referral time was vital, meaning GPs should refer patients in a 'timely fashion' (ID6P, p33). This comment sparked expressions of frustration regarding the unnecessary 'time delay' between patients being referred for hospital tests and results being communicated to GPs. A recently implemented 'red flag' referral system had expedited the patient referral process, but had not improved how quickly GPs received results. This delay influenced communication, treatment decision-making and planning interventions with patients.

'If I have someone who I suspect or if I get a suspicious chest x-ray, there are mechanisms now whereby they are red flag referred. Generally it has improved but it can still be three weeks or so from the time I've made my red flag referral to the patient and carer coming back to me and saying this, this and this. Hospital letters can be weeks upon weeks in coming down to me and I'm relying on the information that the patient and the carer have picked up, and that's not always totally accurate. So electronic or hard copy within a couple of days of discussions and information given would be a great help' (ID2P, p31).

'Slow' or 'sketchy' communication resulted in professionals having 'to tread softly' when communicating with patients. On participant used a metaphor to describe the 'very small window of opportunity' that professionals have to respond to the needs of patients with lung cancer. Another metaphor illustrated how patients 'navigate' their way through the multiple professionals and departments within the health care system, and how physicians navigate their way when communicating with patients.

'Lung cancer is not a forgiving disease, both for the patient or for the professionals involved. The usual standards are, four-fifths of lung cancer at the time of diagnosis are palliative, so you have a very small window of opportunity to get things right and between presenting

with symptoms or signs to the GP to hospital referral to consultant respiratory physician to bronchoscope to MDT to oncologist, all those steps are eating into that small amount of time available and if the information is either slow or sketchy at each one of those steps then the new person coming in has to tread softly. In an ideal world, contemporaneous, instantaneous information would really improve patient care because it would allow less back tracking and back pedalling of each new person coming in to get up to speed where life for these patients is really very short' (ID6P, p32).

In the absence of appropriate IT systems, doctors relied on good working relationships with hospital consultants to 'access investigations and treatment quickly...' (ID2P, p3-4), to prevent delaying the patient's access to care. Another participant demonstrated an empathic understanding that patients may feel that they are living on 'borrowed' time, meaning the time available is precious.

'With advanced lung cancer, compared to other cancers, you don't have that long. Invariably, more often than not, they have chronic illness preceding their cancer diagnosis. So at the time of diagnosis they are already, unfortunately, a fair bit down the disease trajectory compared to other cancer patients. So it can be very difficult and there isn't the same amount of time to adjust, I think, which I think all of us would need, given that information' (ID6P, p23).

Although perceptions of cancer have changed in recent years, one participant recognised that if patients previously knew someone with a similar diagnosis, they would assume that they had 'an awful short time' to live (ID2P, p23). One participant emphasised the flexibility of nurses who could invest more time in the assessment process. However, he agreed that onward referral was important to obtain specialist expertise, such as social work involvement for complex family issues.

'We have more time maybe than the GPs, but when we're with a patient obviously we're very clinical, looking at their drugs. We wouldn't have the time to go into more complex issues that the social worker is able to do, and I think that the need is really identified by the family themselves' (ID3P, p40).

There was consensus that the social work role included addressing the emotional, practical, financial and psychosocial needs of patients diagnosed with cancer and that members of multi-disciplinary team go 'out of their way to help' as they recognise the limited time frames available to help patients living with advanced lung cancer (ID2P, p43).

### Decision-making

Professionals described 'steering' and 'navigating' patients through the decision-making process to promote patient autonomy and empowerment in an attempt to shift towards a more 'deliberative approach'.<sup>47</sup> One participant indicated that he navigated his way through Advance Care Planning conversations to 'offer some kind of choice' to patients (ID6P, p3). Professionals generally perceived that they knew what action or decisions to make in the best interests of their patients regarding end-of-life care decision-making. Some steered patients through different treatment options based on demographic characteristics or health state of individual patients (ID2P, p15).

'Depending on what stage the illness is at and what the prognosis is, so if it is newly diagnosed and there is the possibility of cure, certainly you might approach their management in a particular way. But whenever you're down to the last few weeks the choices that you have to talk through about treatment and care can be quite different. A young fit healthy person with a new diagnosis, a possible cure, yes, we're going to support them as they go for more aggressive treatment. Then towards end of life care you're supporting them and steering them in different decisions' (ID2P, p15).

This emphasises the importance of age, stage of disease, pre-existing health state and prognosis in relation to clinical decision-making about treatment, which are linked to Llewellyn-Thomas' decision-making model<sup>48</sup>. The 'steering' metaphor emphasises how both patient and professional are navigating their way through the cancer journey, but findings suggest that the professional has more power based on knowledge.

There was evidence of professionals managing ethical issues, such as family members requesting professionals to collude by withholding information from patients. This also raised issues in relation to professional codes of conduct and duty of care towards patients. According to Katz and Johnson<sup>49</sup> the four principles of medical ethics include beneficence, non-maleficence, justice and autonomy, which professionals used to underpin their practice.

'I suppose autonomy. Once the patient has been as fully informed, as they're able to take in, all the information...But then, just talking through all the options with the patients, beneficence and non-beneficence, what treatments would take out of them. I would tend to talk to them in terms of cost, how much this [treatment] will cost you by way of adverse effects, time out of action and what hopeful benefit there would be from that treatment. So talking all that through and helping the patient and their carer come to a decision as to what is the best form of treatment for them... The other ethical principle, obviously justice, tends not to be an issue I've come across because most of my patients are accepting of the treatments that are available locally and of the advice they are given' (ID2P, p6).

Others agreed that it was important to maximise the patient's quality of life and ensure that preferences for future care or place of care were reviewed repeatedly to ensure that changes in decision-making were captured, and that consent, another important ethical principle, was obtained at various points of the patient's illness trajectory (ID3P, p7). It was acknowledged that if empowered with appropriate information, patients can make 'brilliant decisions' about their treatment and care. Another metaphor was used to illustrate how the principles of autonomy and choice were 'threaded through' the work of all professionals, highlighting that decision-making went beyond treatment.

'I think it came up quite a bit about autonomy and choice and I think that is a big thread through everyone's work. The patients are also making decisions about how to live on a day-to-day basis and how to function with the limited amount of energy and what they can and cannot do. How they interact with their family and people around them and their friends...I think we need to remember that it's not just about treatment decisions' (ID7P, p9).

47 Emanuel and Emanuel, "Four models," 221-2226.

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48 Llewellyn-Thomas, "Patients' health care," 101-6.

49 Renee S. Katz and Therese G. Johnson, *When Professionals Weep: Emotional and Countertransference in End of Life Care* (New York: Routledge, 2006)

The findings also emphasised how professionals realised the importance of establishing patient preferences and expectations and to offer some form of choice.

'I guess later on in the disease trajectory, eh...clinical decisions might be more focused around the end of life care, navigating their wishes regarding certain interventions, in terms of symptom control measures. You're usually [sigh] offering some kind of choice but more or less you have an idea as to how best to try and manage symptoms towards the end of life' (ID6P, p3).

However, another participant suggested that patients differ in 'how much they want to be in charge of their own care' (ID1P, p45). One participant reflected on a patient who tried to talk to his wife about his preferences for end of life and his funeral wishes:

'I'm thinking of a family I was with earlier in the week where the patient wants to make plans for his end of life care and funeral arrangements and his wife is totally distressed at this conversation. You have two very anxious people in the house. You have the patient who wants to make these final decisions and write down his wishes, which will be a relief for him. However, his wife is not ready to have those conversations' (ID4P, p22).

Two participants indicated that barriers to decision-making included gauging the most appropriate time to have sensitive conversations with patients, societal taboos and avoidance of discussing end of life issues, coupled with the fact that medical physicians do not routinely record what the patient prefers.

'We don't do the discussion, we don't record it, and we don't always communicate it to out of hours...so the doctor attending unnecessarily sends [the patient] into hospital, which is not the ideal place for him...so there's still a lot of work for us to be doing to encourage them' (ID2P, p46).

The disadvantage of such practice is when a patient rapidly deteriorates, and the ambulance crew are 'duty bound' to actively attempt resuscitation, even with a 'limited chance of success or a very poor outcome' (ID2P, p48). One participant aired caution at making assumptions about a patient's wishes and reiterated the importance of 'knowing your patient'. Another highlighted that discussing resuscitation and advance care planning require 'people with a lot of experience and clinical maturity' (ID6P, p50).

End of life care policies in the United Kingdom indicate that, wherever possible, most people prefer to remain at home for end-of-life care. However, the unavailability of formal resources, or informal support from family or friends, were potential barriers to facilitating a home death. One participant referred to a male patient who wanted to die at home but needed 24-hour care, and overnight nursing services could not offer the necessary cover. The patient's wife 'was at the end of her tether' so he was admitted to the hospice. Although an admission was not what the couple wanted, it transpired that the patient had been 'missing out on some breakthrough medication', and the carer was 'able to sit with him for a couple of hours.' (ID1P). Some participants struggled when patients were not cared for at home, particularly when it was their preferred place of care.

'Personally, I find it the hardest where I'm aware that a patient could be maintained at home and it is their preferred place of care, but for whatever reason, the family, circumstances, or past experiences, they don't. I reckon that if a daughter or son put a bit more effort in, they could stay at home' (ID2P, p16).

Although there was recognition that family circumstances or past life events could be influencing the family member's decision-making, there was less tolerance for relatives who do not facilitate a home death for their parents. This participant had insight into the blame culture associated with the powerlessness in such important decision-making, and later reflected on the fact that 'if somebody can't be maintained at home, we have no influence over that, and often we blame ourselves whenever the system can't provide levels of care' (ID2P, p17).

### Communication

Promoting open and honest communication between patients and professionals requires trust, access to accurate information, sensitive delivery of information to suit the patient and family, competent management of emotional responses and minimising fears. This theme explores how professionals aim to tailor information to suit patients; emphasises the benefits of establishing effective working relationships; and identifies how information is channelled or blocked during communication.

Most participants recognised that patients differ in their quest for information. Some prefer 'to know every last detail in a very biomedical way to the nth degree what their illness is and everything about it' (ID6P, p14), whereas others want 'to bury their head in their hands' and not know anything (ID1P, p26). Participants believed that it is important 'not to overload them with information' and the need to 'tailor information to what you feel they're able to process and deal with' (ID7P, p19). At the other end of the spectrum, some participants believed that avoidance was underpinned by stigma associated with having a diagnosis of lung cancer, or 'avoiding any acknowledgement that life is finite' (ID6P, p14), or recognising patients are 'at different stages of acceptance or denial' (ID3P, p28). Regardless of the different perspectives, participants have a duty of care to respect the patient's preferences regarding the communication of information and estimate how much information the patient could cope with, especially as patients with lung cancer have a lot of anxiety around breathing.

Breaking bad news is regarded as one of the most fraught communication encounters, which requires careful consideration of the place, person and time, which has been cited in the published literature.<sup>50</sup> There was general acceptance among participants that deciding where and when to communicate with patients about their diagnosis, treatment outcomes, or prognosis was problematic. The main issue was that professionals often see patients during busy out-patient clinics, which minimises time and privacy. One respondent indicated that 'because we're busy and rushing, we can skirt around dealing with the difficult questions' (ID2P, p24).

The time-limited appointments with physicians accommodated avoidance of discussing sensitive issues, by both physicians and or patients. According to *Regional Guidance for Breaking Bad News* 'clinicians are often uncomfortable discussing prognosis and possi-

50 C.M. Cooley, "Communication skills in palliative care," *Professional Nurse* 15, no. 9 (July 2000): 603-605.

ble treatment options, particularly if unfavourable'.<sup>51</sup> Another issue arising from the findings included the time it takes to deliver useful information at the patient's pace. The *Regional Guidance* recommends that physicians communicate at a level of comprehension suited to the patient, offer information in small chunks and allow time for patients to process what they have heard. One participant indicated that 'a big chunk of my time is spent trying to feedback information to patients at the level that is right for them, that they can understand and then use' (ID6P, p8).

Community professionals reflected on the benefits of being able to establish effective working relationships with their patients, over time, compared to hospital-based professionals. Some suggested that GPs are in a very 'privileged position', because they have usually known their patients for years, and have insight into their values, capabilities and wider familial or social network, which may encourage open and honest communication, or trust. However, trust, particularly in the medical profession, was acknowledged as fragile, and could be threatened or destroyed if there was a delayed or incorrect diagnosis; or overestimation of the potential benefits of treatment or life expectancy, which could cause 'untold damage that can take a very long time to recover from' (ID2P, p20). This participant later indicated that he dealt with angry patients or relatives by 'going in and facing the difficulty, and taking the initial dig on the chin, and then moving on...' (ID2P, p27). The metaphor emphasised the physical blow that professionals feel when they know they have made a mistake, or have caused harm or distress to their patient. This reinforces the perceived benefits of doctors having timely access to accurate diagnostic information, having competent communication skills and maintaining healthy working relationships with their patients.

To conduct holistic assessments and provide the necessary therapeutic or clinical interventions, professionals need to spend time with their patients. However, one participant faced resistance when 'the daughters wanted me to spend time on my own with their mother who was my patient, whereas the husband didn't. He was frightened I would tell her the truth, and refused to let me go into the room on my own so that she couldn't ask questions' (ID3P, p 28). Another indicated that family members want professionals to collude with them, but professionals tell family: 'I will answer the patient's questions as honestly as I can, based on whatever information is available' (ID2P, p18), which he linked back to the four ethical principles, beneficence, nonmaleficence, justice and autonomy guiding practice.

### Discussion

This study aimed to contribute to the academic literature on factors influencing decision-making by health and social care professionals, to explore how professionals approach and facilitate decision-making in end-of-life care, and to contribute to policy or practice.

Based on the focus groups, factors influencing decision-making included the professional's knowledge of the patient's health and where they are in their cancer journey, knowing what treatment options are available and being able to weigh up the costs and benefits of undergoing treatment, which mirrors the Llewellyn-Thomas decision-making model (1995).<sup>52</sup>

According to the focus group professionals, decisions to withdraw or provide treatment involve a process of weighing up the perceived costs of adverse effects against the hopeful benefits in terms of quality of life or life expectancy. Professionals indicated that they 'navigate' through such challenging medical decisions regarding the provision or withdrawal of treatment

or deciding if a patient should be admitted to hospital for active medical interventions or offered specialist palliative care services. Winkler et al. (2012).<sup>53</sup> explored this process of weighing up harms versus risks using an ethical algorithm.

According to the literature, professionals are obliged to promote trust, integrity and autonomy in decision-making<sup>54</sup> which underpins humane, ethical, legal and clinically sound shared decision-making<sup>55</sup> and minimises the likelihood of a paternalistic approach to decision-making.<sup>56</sup> As illustrated in the focus group findings professionals were fully aware of their ethical obligations to promote shared decision-making, however this required complex and sensitive communication with patients and their family carers as they 'navigated' their way through decisions, particularly surrounding treatment and care. In most cases, the professionals were fully aware that they were driving or influencing decisions, based on their expertise with the illness and treatments, as well as their knowledge of the patient and the family. There was also recognition that community professionals have more time and privacy to build relationships with patients, compared to hospital staff, but that relatives can obstruct private conversations with patients.

The *Regional Breaking Bad News Guidance*<sup>57</sup> recommends that professionals should give a 'warning shot' about what is going to be discussed, answer the patient's questions, acknowledge any distress and suggest time out for reflection and for the patient to collect their thoughts. Professionals in this study indicated that when they communicate bad news, they use different strategies to gauge what level of information patients actually want to know prior to sharing it with patients and deliver it in 'bite-size chunks' to avoid 'overloading' patients. Similarities in this approach were noted in the international and national literature.<sup>58</sup> Professionals were aware of the variance in patient preferences regarding information needs, which may be linked to levels of acceptance, but highlights the importance of professionals taking time to establish a relationship with their patients, and personalising responses based on cues or prompts from the patient. Respecting that not all patients wish to receive the same depth of information is reported in the literature.<sup>59</sup>

The *Breaking Bad News Guidance* also recommends that bad news should be communicated at a time and place that offers the patient respect and privacy. Focus group professionals confirmed that patients normally receive bad news during busy outpatient clinics. They regarded this as challenging, due to the limited time available to spend with patients, or the lack of privacy, particularly for those who need time to absorb or accept the news of their illness or to make decisions about their future treatment or care. This was similar to findings reported internationally by Deschepper et al.<sup>60</sup> where professionals believed there was a lack of time during consultations.

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- 53 Eva C, Winkler et al., "Evaluating a patient's request for life-prolonging treatment: an ethical framework," *Journal of Medical Ethics* 38, no. 11 (November 2012): 647-651, doi: [10.1136/medethics-2011-100333](https://doi.org/10.1136/medethics-2011-100333)
  - 54 Brescia, "Philosophical oncology," 429-434.
  - 55 Phillip C. Higgins and Terry Altילו, "Palliative sedation: an essential place for clinical excellence," *Journal of Social Work in End of Life and Palliative Care* 3, no. 4 (October 2008): 3-30.
  - 56 Emanuel and Emanuel, "Four models," 221-2226; Keating et al., "Cancer patients' roles," 4364-4370.
  - 57 DHSSPSNI Breaking Bad News Guidelines, 2003.
  - 58 Back et al., "Communication about cancer," 1897-1910; Tang et al., "Patient awareness," 1201-1209; Tuffrey-Wijne, "The preferred place," 16-21.
  - 59 Ramondetta et al., "Approaches for end of life," 580-588.
  - 60 Reginald Deschepper et al., "Truth-telling at the end of life: a pilot study on the perspective of patients and professional caregivers." *Patient Education and Counseling* 71 (2007): 52-56. Doi: [10.1016/j.pec.2007.11.015](https://doi.org/10.1016/j.pec.2007.11.015)

51 "Department of Health, Social Services and Public Safety Northern Ireland" (2003): p. 5.  
 52 Llewellyn-Thomas, "Patients' health care," 101-6.

During the focus group meetings, there was consensus that physicians are not always good at sitting down with patients or family members to plan ahead due to perceived barriers in social attitudes towards death, fears of upsetting the patient or family, or a preference to avoid the issue. According to Raijmakers et al.<sup>61</sup> palliative care experts in different professions and countries encounter similar issues around communication. Such 'hard conversations' require 'clinical maturity', which should not be delegated to junior medical physicians, and need to be appropriately timed. Societal attitudes towards discussing death or ACP are constantly juggled with professionals feeling 'duty bound' to determine patient preferences and expectations. This 'duty' is derived from the medical code of practice, ethical principles<sup>62,66</sup> and trends in end of life care policy.<sup>63</sup>

Professionals recognised that being able to engage in ACP conversations relies on the nature of the relationship between the patient and professional, as well as how much the patient wants to be in charge of decisions regarding their own care or treatment. Deschepper et al.<sup>64</sup> found that professionals and patients were in a 'catch 22' situation, waiting on the other to initiate end of life care conversations and that self-involvement in decision-making is important to the European public.<sup>65</sup>

### Conclusion

Health and social care professionals need timely access to accurate diagnostic or prognostic information and privacy to talk to patients around treatment, prognosis, preferences for end-of-life care. Professionals require a respectful and trusting relationship with patients, underpinned by competent communication skills, so that they can pace and pitch information to suit the patient or family in a way that respects the wishes of the patients. IT systems need to be utilised to improve the flow of diagnostic and prognostic information between medical professionals in hospitals and the community, and multi-disciplinary team working should be encouraged to offer holistic care to patients and their relatives.

### AUTHOR CONTRIBUTIONS

The mentioned author significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

The author declares that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, the author declares that there is no conflict of interest related to this article or its review.

61 Natasha Raijmakers et al., "Issues and needs in end-of-life decision making an international modified Delphi study," *Palliative Medicine* 26, no. 7 (October 2011): 947-53, doi: 10.1177/0269216311423794

62 Katz and Johnston, "When professionals weep,"

63 DHSSPSNI End of Life Care Strategy, 2010.

64 Reginald Deschepper et al., "Truth telling," 52-56.

65 Barbara A. Daveson et al., "To be involved or not to be involved: a survey of public preferences for self-involvement in decision-making involving mental capacity (competency) within Europe," *Palliative Medicine* 27, no. 5 (2013): 418-27, doi: 10.1177/0269216312471883. Epub 2013 Feb 20

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## HUMAN VALUES AND THE FEEL OF SOCIAL AND HEALTH THREATS



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### Abstract

**Background:** The text discusses the relationship between declared instrumental moral values and the feeling of threat in the field of addiction.

**Methods:** The field of measurement of respondent's health and social risks was examined by asking questions with binomial answers (yes / no). As factorial (independent) variables we used the categories such as gender, age, personal situation, family situation and education. For testing of hypotheses we used  $\chi^2$  test of independence for  $r \times c$  contingency tables (each value  $x$  specific threat). The research group consisted of 5425 respondents.

**Results:** The relationship between the size of residence and the degree of feeling threatened by addictive substances has not been proven. We record the threat of drug addiction in a group of people with basic education, specifically among high school students. In terms of religion, there is a statistically significant difference in the risk of dependence on cigarettes and tobacco products. The relationship has also been proven in connection with drug use and the very poor economic situation of the household. For all types of threat, a statistically significant relationship was demonstrated only for the value of honest. Drug threats show high scores for helpful, responsible, faithful, polite and obedient. The risk of alcohol is proven to be helpful, responsible, polite and clean. The tobacco risk is proven to be faithful and obedient. People with a low value of helpful and polite are at risk of drug dependence.

**Conclusion:** The category of health and social risks takes place as a mainstay and suitable for deep elaboration. Based on the results, it can be hypothesized that there is a connection between the recognition of morally instrumental values and health and social threats in the form of dependent behavior.

**Keywords:** Values – Addiction – Health and social risks – Threat.

### Introduction

The values as one of the key philosophical and psychological concepts from the second half of 19th century till today is not often discussed in moral theology and it is not even part of the courses concerning special moral theology. In our paper we would like to offer a little contribution which may help to open the problem of values to theologians also show values as a special kind of bridge which can connect the inner area of values manifested in moral judgements with some impacts into everyday life of the individual. We especially would like

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to show the connection between the values as the specific kind of beliefs<sup>67</sup> and experiencing several social and health threats which are very actual in contemporary society and even some christian communities.

From the psychological point of view values are specific kinds of normative and prescriptive beliefs<sup>68</sup>. They play a significant role in the moral judgements because they help to organize the preferences of each individual. These organized preferences, which are often described as the value system, helps people in everyday situations to judge the thoughts and behavior as morally good or evil. Most of these moral judgements coming from values are confronted also with moral norms coming from religious belief and/or church moral statements and have an impact on an individuals' morals. Although the outer norms may not come from religion (or church or theology) this case is usual because religion is often the source of these norms<sup>69</sup> and also claims the believer should accept and interiorize the moral norms. These judgements can lead to four different situations:

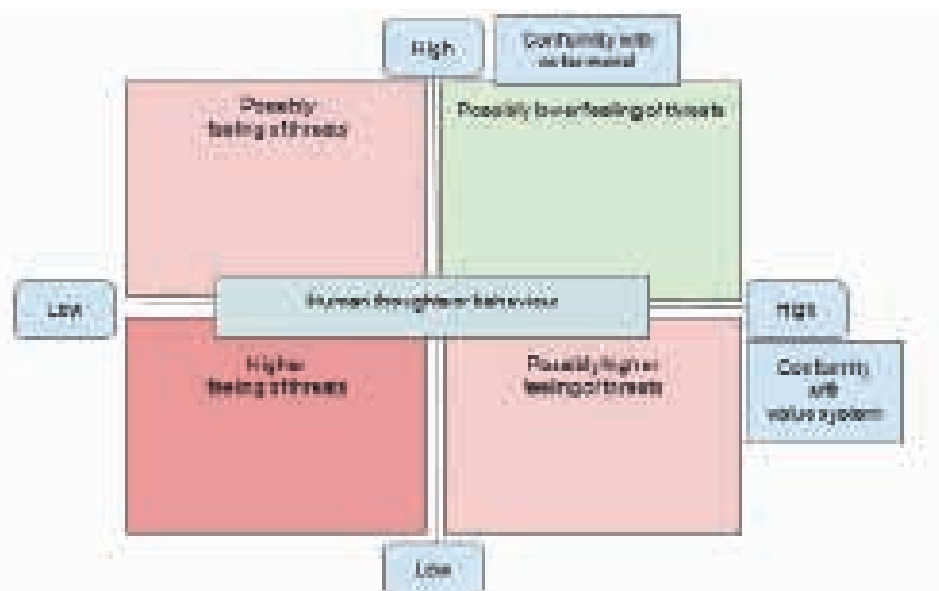
- a) the thought or behaviour conforms with the individuals' values and also the outer moral norms
- b) the thought or behaviour conforms with the individuals' values but is in contradiction with outer moral norms
- c) the thought or behaviour conforms with outer moral norms but is in contradiction with the individuals' values
- d) the thought or behaviour is in contradiction with both the individuals' values and outer moral norms

With case a) is not problematic and describes the ideal situation. On the contrary with case d) which describes a situation when the person does or thinks something, what is even by them recognized as being morally bad. On the other hand cases b) and c) are often the source of inner conflicts between the value system and the outer moral norm. The situation when there exists a contradiction between thoughts or behaviour on one side and value system or/and outer moral norms on the other could be a source of risky behaviour also feelings of threat, including the threats concerning social and health issues. The inner conflict between individuals' value system and outer moral norms possibly make these threats worse and the feeling of threat could be experienced more intensively. The possible situations are demonstrated in the following chart:

67 M. Rokeach, "Beliefs, attitudes, and values: A theory of organization and change" (San Francisco: Jossey-Bass, 1969); M. Rokeach, "The Nature of Human Values" (New York: The Free Press, 1973).

68 M. Rokeach, "The Nature of Human Values" (New York: The Free Press, 1973).

69 Ch. Tamir, A. Connaughton and A. M. Salazar, "The Global God Divide" Pew Research Center, 2020 <https://www.pewresearch.org/global/2020/07/20/the-global-god-divide/>.



The suggested model of the relationship between social and health threats, value system and outer moral norms is not definite and surely does not represent all factors influencing the existence of the feeling of threat. Also not all values nor all outer moral norms have the same influence on these feelings. But, we suppose there should exist a group of values which are more than other sources of the feeling of threat and are also more than others connected with outer moral norms. These values have been recognized by Milton Rokeach<sup>70</sup> as instrumental moral values and in our research we tried to confirm their substantial relation to feel one or more social and health threat. In the context of our research, the connection between instrumental moral values and outer moral norms represent the specific part of personality where the deep understanding between outer system of moral norms and inner value system could exist. But, unfortunately, in a significant number of cases there can also exist a tension between these systems. The problem is much more deeper when the outer moral norms are also legal norms and the conflict between values and outer norms leads to law breaking.<sup>71</sup> In forthcoming research we are going to examine this intrapersonal conflict but in this paper we would like to show the role of social threats as the factor influencing the moral instrumental values and confirm the relationship between the feeling of threat and the measured preferences of the values. For this preliminary study we chose four significant social and health threats (drugs, alcoholism, nicotine and overuse of medication) because they are relatively common and often cause the conflict with both the inner value system and outer moral norms (in the case of drugs and overuse of medication and legal norms).

Although we can say in accordance with the Preamble of the National Drug Policy Strategy for the period 2005 to 2009 that „drug use has become one of the most serious social problems

70 M. Rokeach, "The Nature of Human Values" (New York: The Free Press, 1973).  
 71 S. Oerer, "Conflicting norms, values, and interests: A perspective from legal academia," *Ethics & International Affairs* 33, no. 1 (2019): 57-66, doi:http://dx.doi.org/10.1017/S089267941800093X.

not only in our country but throughout the world<sup>72</sup>, it should be recalled that the severity of these problems and the method of their evaluation depends on the situation in which the assessment is made. Individual opinions and attitudes are variable, especially on the basis of different value orientations of current assessors.

The Annual Report on the State of Drugs in the Czech Republic<sup>73</sup> shows that 14.0–18.1% of people aged 15+ risky drink, 8.5–12.5% have used sedative and hypnotic drugs and / or opioid drugs used for over-the-counter pain in the last 12 months, or have used them against the advice of a doctor or pharmacist. A total of 0.66% of the population aged 15–64 risky uses Crystal Meth or opioids.

According to the CVVM survey (2020), the attitudes of the Czech population to the use of addictive substances have been stable for a long time. However, it should be noted that the acceptability of tobacco smoking and alcohol consumption, especially their regular use, is currently slightly declining, while the acceptability of cannabis and other illicit drugs are slightly increasing. Evidence of the declining tolerance of tobacco smoking is the long-term growing level of satisfaction with the introduction of a ban on smoking in restaurants (in 2019, a total of 75.6% of respondents stated satisfaction, 69.5% in 2018 and 61.4% in 2017). Despite the increasing tolerance to drugs themselves, the group of people addicted to drugs belongs to the category to which respondents in the surveys state the lowest level of tolerance and the highest level of social distance. 86% of respondents would not want to have them in court. This is followed by people with a criminal background, alcoholics and Muslims. One-fifth of respondents (19%) distance themselves from smokers.<sup>74</sup>

**Research methods**

*Identification of social and health threats in the survey*

From the methodological point of view, measuring health and social threats is a problem as these facts cannot be validly measured by direct questioning. Therefore, for the purposes of the survey, we did not go for the measurement of the social threat itself, but we used a subjective perception of the existence of the social threat from the respondent's point of view. We assume that people who subjectively identify a threat, are a subset of people who are really at risk by these threats. We came to such an assumption mainly because of the fact that the current personal situation of the respondent is not, in many cases the significance for the existence of the threat is significant as is the perception of the current or even a potential future threat by the respondent. So the 'felt only' threats could be experienced with the same intensity as real ones and they could in the same way as real ones the cause of values' change. There is growing evidence that imagination can influence the real processes of perception, real-world threats and predict the future events and also emotions.<sup>75</sup> In accordance with these roles we assume the value system could be influenced by real as well as by imagined threats. That was why we considered measuring subjective feelings of threat.

72 Úřad vlády ČR. "Národní strategie protidrogové politiky na období 2005 až 2009" Praha: Úřad vlády ČR, 2005.  
 73 V. Mravčík, et al. "Výroční zpráva o stavu ve věcech drog v České republice v roce 2019" Praha: Úřad vlády České republiky, 2020.  
 74 Milan Tuček, "Tolerance k vybraným skupinám obyvatel – březen 2020." Tisková zpráva. Centrum pro výzkum veřejného mínění, Sociologický ústav AV ČR, v.v.i.  
 75 Marianne, Cumella Reddan, Dessart Wager Tor and Daniela Schiller, „Attenuating Neural Threat Expression with Imagination“ *Neuron* 100, 4 (2018): 994, doi:http://dx.doi.org/10.1016/j.neuron.2018.10.047

The risks examined relate to the area of substance dependence. Therefore, the field of measurement of respondent's health and social risks was examined by asking questions with binomial answers (yes/no) that relate to drugs, drug addiction, including light drugs (133; 2,57 %), alcoholism (481; 9,29 %), addiction to cigarettes and tobacco products (891; 17,22 %) and drug addiction (107; 2,07 %).

Each health and social threat mentioned above categorized respondents to those who are affected by the specific threat and those who are not. These categories determined each threat and were used as dependent variables in statistical testing of hypotheses. As factorial (independent) variables we used the categories described above (gender, age, personal situation, family situation and education). For testing of hypotheses we used the  $\chi^2$  test of independence for  $r \times c$  contingency tables (specific threat  $\times$  each value). In total, we calculated the dependencies for 80 contingency tables and the overall results of these tests are available in Table 1. In each contingency table we determined the standard residuals, as well. Standard residuals were statistically evaluated and for each cell of every table the  $z$  value was calculated. These values allowed us to analyze specific influences of every factor in occurrence of each specific threat.

#### Moral instrumental values measurement

The values were measured using a visual analogue scale from 1 to 10 where 1 represents strongly negative attitude to specific value and 10 represents strongly positive attitude to the specific value.

The research follows the Rokeach's itinerary of instrumental values which is divided into

- 1) moral instrumental values; additionally to Rokeach's itinerary we added the value of protecting the environment because of its importance for the research topic, and
- 2) competence instrumental values.

For this paper we used only moral instrumental values because of the theoretical reasons described before.

For each value the categorization of preferences was provided and respondents were divided into four groups:

1. low preferences of the value (preference is lower than  $\mu - \sigma$ ),
2. lower preferences of the value (preference is lower than  $\mu$  and higher than  $\mu - \sigma$ ),
3. higher preferences of the value (preference is higher than  $\mu$  and lower than  $\mu + \sigma$ ),
4. high preferences of the value (preference is higher than  $\mu + \sigma$ ).

#### Measured data

The above-described concept of the research survey was grasped as a pilot research of health and social threats carried out within the extensive data collection focused on the analysis of the relationship between values and leisure. However, the issue of social and health threats, on the basis of piloting, proves to be the mainstay and deserves deeper elaboration and specifically focused research.

The research group consisted of 5425 respondents. After cleaning up the invalid measurements, 5,175 valid respondents remained. The validity of the measurements was verified on the basis of the heterogeneity of the measured value preferences. Measurements that showed too high homogeneity (standard deviation  $< 0.7$  on scale 1 - 10) were removed due to very low validity. The rational assumption in this case is that no one has the same preferences or very similar preferences of all the values and their results are dubious.

In the research group, women slightly predominate ( $n = 2957$ , 57%) over men ( $n = 2204$ , 43%). This slight predominance is evident evenly across all age categories. Data cleaning had no effect on the resulting male-female ratio. In terms of age groups, the most numerous category is 15-24 ( $n = 1397$ , 26%), the second most numerous category is the group 25-34 ( $n = 1140$ , 22%). On the contrary, the least represented category is the age group 65+ ( $n = 395$ , 7%). In terms of the representativeness of the research file, this is a certain limit of research and this fact is taken into account when interpreting the data. In terms of educational attainment, respondents were asked not only about the highest completed education, but also about the current education. The research group consisted of 10.7% of respondents with basic education, 13.7% of respondents trained in the field of study, 42.3% of secondary school graduates and 33% of respondents with university or higher vocational education. In terms of the structure of the population according to the size of the municipality, our research group is in accordance with the composition of the target population. The proportion of respondents from municipalities with less than 15,000 inhabitants makes up 52% of the research sample. In terms of religion, people without religion predominated in the research group ( $n = 3443$ , 66.5%). The second most numerous group consisted of respondents professing Christianity ( $n = 1582$ , 30%). Other religions are practiced by 2.2% of respondents.

#### **Results**

Respondents were asked whether they were personally or in their household at risk of addiction in the form of a) drugs, drug addiction (including light drugs), b) alcoholism, c) addiction to cigarettes and tobacco products, d) medical drug addiction. This item has been tested in relation to other independent variables. In line with the assumptions, the influence of the size of the residence and the degree of feeling threatened by addictive substances was not proven. It is worth mentioning only the highest score of ( $z: 2.7420^{**}$ ) for the threat of medical drug addiction declared by respondents living in small towns (3500-15000 inhabitants). We record the threat of drug addiction in the group of people with basic education ( $z: 3.6362^{***}$ ). However, it should be noted that a significant proportion of people (61%) in this group are secondary school students ( $z: 2.5496^*$ ). On the contrary, the people least feeling at risk are with university and higher vocational education ( $z: -2.4492^*$ ). University students are also characterized by a very low score for the risk of dependence on cigarettes and tobacco products ( $z: -4.1151^{***}$ ). Respondents trained in the field of study show significantly higher scores against other educational groups in the field of risk of dependence on cigarettes and tobacco products ( $z: 2.6549^{**}$ ) and on medical drugs ( $z: 4.0055^{***}$ ). In terms of religion, there is a statistically significant difference in the risk of dependence on cigarettes and tobacco products among respondents professing Christianity ( $z: -4.9079^{***}$ ) and respondents without religion ( $z: 4.7033^{***}$ ). The relationship ( $z: 3.0776^{**}$ ) was also proven in connection with drug use and the very poor economic situation of the household (the household suffers from shortages, living with difficulties „from paycheck to paycheck“ or living in debt). These respondents also show high scores for the threat of medical drug addiction ( $z: 3.7643^{***}$ )

Specific attention was focused on the relationship between the declared inclination to recognize the values presented and the feeling of being addicted to addictive substances. The results are documented in Table 1.

**Table No. 1 Influence of declared instrumental moral values on health and social threat**

		drugs, drug addiction (including light drugs) n= 133, 2,57 %	alcoholism n= 481, 9,29 %	addiction to cigarettes and tobacco products n= 891, 17,22 %	medical drugs (medications) addiction n= 107, 2,07 %
Value helpful	1	z: 3,9844***	z: 3,4051***	z: -0,0972	z: 3,2421**
	2	z: -1,0801	z: 1,0201	z: -0,1508	z: -0,3683
	3	z: -0,9295	z: -1,6693	z: -0,4961	z: 0,6444
	4	z: -1,2122	z: -1,9601*	z: 0,5672	z: -2,4644*
		p = 0,001131	p = 0,001748	p = 0,940418	p = 0,005448
Value honest	1	z: 4,3566***	z: 5,5949***	z: 2,5310*	z: 4,0143***
	2	z: 1,0985	z: -0,0833	z: 1,2763	z: -0,6945
	3	z: -4,4185***	z: -2,4920*	z: -3,4860***	z: -1,6344
	4	z: -0,1980	z: -1,8382	z: 0,1639	z: -0,9093
		p = 0,000001	p = 0,000000	p = 0,001266	p = 0,000873
Value responsible	1	z: 3,1482**	z: 4,2384***	z: 1,2816	z: 2,4536*
	2	z: 1,1678	z: 0,6213	z: 0,6663	z: 0,0669
	3	z: -1,3106	z: -1,8475	z: -1,4613	z: 0,0470
	4	z: -2,2009*	z: -2,0649*	z: -0,2141	z: -1,9614*
		p = 0,003224	p = 0,000122	p = 0,342193	p = 0,056675
Value faithful	1	z: 3,3239***	z: 1,9411	z: 5,3523***	z: -0,4505
	2	z: -2,8375***	z: -1,5723	z: 0,1286	z: -0,7690
	3	z: 0,4512	z: -1,5334	z: -2,6020**	z: -0,6039
	4	z: -0,9729	z: 1,2573	z: -2,9514**	z: 1,9211
		p = 0,001708	p = 0,054950	p = 0,000000	p = 0,292444
Value polite	1	z: 2,7261**	z: 3,5095***	z: 0,3543	z: 3,3536***
	2	z: 1,1652	z: -0,1408	z: -0,9177	z: -1,0727
	3	z: -2,5680*	z: -0,7702	z: -0,2150	z: 0,0312
	4	z: -0,7738	z: -1,9201	z: 0,7863	z: -1,7002
		p = 0,006094	p = 0,004011	p = 0,753613	p = 0,006468

Value obedient	1	z: 3,3710***	z: 2,2745*	z: 3,4372***	z: 0,4705
	2	z: -1,2561	z: -0,5201	z: 0,0104	z: -0,4514
	3	z: -0,4105	z: -0,5685	z: -2,9702**	z: 0,0147
	4	z: -1,4401	z: -1,0204	z: 0,0920	z: 0,0573
		p = 0,006950	p = 0,140381	p = 0,001354	p = 0,956338
Value clean	1	z: 2,3511*	z: 3,9652***	z: 2,7114**	z: 0,7851
	2	z: 1,9154	z: 0,6422	z: 0,6915	z: 1,3644
	3	z: -1,9001	z: -1,9165	z: -1,7182	z: -0,4498
	4	z: -1,9673*	z: -1,9847*	z: -1,1901	z: -1,6047
		p = 0,005387	p = 0,000271	p = 0,021848	p = 0,271437
Value broad, open minded	1	z: -0,3184	z: 1,6735	z: -0,4113	z: 2,0821*
	2	z: -0,1776	z: -0,0322	z: -0,2128	z: 1,3475
	3	z: -1,1247	z: -0,3274	z: -0,5425	z: -1,1249
	4	z: 1,8401	z: -1,0957	z: 1,2728	z: -2,1510*
		p = 0,297592	p = 0,332114	p = 0,641922	p = 0,023533

Only results for the group of respondents who feel the threats are displayed. The control group (rest of the population) has exactly an opposite z because of the binomial measurement. The preferences of each value were divided into 4 groups (1: low preferences, 2: lower preferences, 3: higher preferences, 4: high preferences).

Table 1 shows that the proportion of people who answered positively to the question of whether they are affected by any of the listed health and social threats was relatively low. Drugs, drug addiction are considered a threat by a total of 133 respondents (ie 2.57%), alcoholism by 481 respondents (ie 9.29%), addiction to cigarettes and tobacco products by 891 respondents (ie 17.22%) and 107 (ie 2.07%) respondents addiction to medical drugs.

If we look in more detail at the value of caring for loved ones (helpful), we will find that this value is characterized by an interesting phenomenon. Respondents who attach the lowest importance to this value also show high scores for drug, alcohol and drug addictions. The strength of this box is saturated mainly by female respondents: drugs (z: 3.5991 \*\*\*), alcohol (z: 2.9248 \*\*), medical drugs (z: 2.7292 \*\*).

Looking at the value of honesty (honest), we find that, as with the value of helpful people, respondents who attach the least importance to this value also have high scores for drug, alcohol and medical drug addictions.

In the value of responsibility (responsible), we observe this phenomenon only in the case of the threat of drugs and alcohol.

The value of faith (faithful) reaches a positive point with low value for drugs and addiction to cigarettes and tobacco products. The strength of the drug score is saturated mainly by male respondents (z: 2.6858 \*\*). The value of faith and faith itself were previously recognized as

a protective factor of more psychological problems, among others also addictions. (Dobříková, 2016, Grim, Grim, 2019). Our results confirm these previous findings through the value of faith and show that people with low preferences of this value are more inclined to drug and tobacco addiction.

For the value of upbringing, good manners (polite), the respondents who attach the lowest importance to this value also show high scores for drug, alcohol and drug addictions. Alcoholism is saturated with men (z: 4.3545 \*\*\*)

In comparison, the obedience value shows a high score of drug dependence and dependence on cigarettes and tobacco products at the low significance of the value. The score is saturated with women: drugs (z: 3.8996 \*\*\*), cigarettes (z: 3.3525 \*\*\*).

The value of moral purity (clean) shows a high score only in alcoholism. With broad, open minded, there was no statistically significant difference in any of the items examined.

### Discussion

Contrary to the original assumptions, the effect of age was not statistically significantly demonstrated in our research group. It should also be emphasized that we measured the subjective perception of the threat of addiction, which, however, can be distorted in the generation of young people. Excessive use of psychoactive substances can provide adolescents with supposed feelings of liberation and detachment.<sup>76</sup> This justifies young people's inclination towards drugs. On the other hand, as physical strength gradually decreases or pains are added, psychoactive substances can act as a relief in such a case. Frouzová<sup>77</sup> thus draws attention to the tabooed excessive use of psychoactive substances by seniors. Therefore, perhaps the result is not surprising given how the question was formed.

The relationship between substance use and the unfavorable socio-economic situation is two-way. For substance users, social exclusion is a significant barrier to returning to society. People at risk of substance abuse are unemployed and have housing problems. Unstable housing as well as indebtedness are also major obstacles to recovery and social integration and, without help, are often an insurmountable problem.<sup>78</sup> The relationship between low socioeconomic status and drug threats is also evident in our data. High demoralization values are associated with the use of tobacco, problem drinking and regular drug intake. In this case, it is appropriate to talk about the essential need for multidisciplinary cooperation.<sup>79</sup>

76 Martin Hajný, "Psychologické, vývojové a rodinné faktory vzniku a udržování závislosti," in Kamil Kalina et al., *Základy klinické adiktologie* (Praha: Grada, 2008): 41-52.

77 Magdalena Frouzová, "Úvod do problematiky specifické klientely a „nových závislostí," in Kamil Kalina et al., *Drogy a drogové závislosti 2: Mezioborový přístup* (Praha: Úřad vlády České republiky, 2003): 229-231.

78 V. Mravčík, et al., "Výroční zpráva o stavu ve věcech drog v České republice v roce 2019" (Praha: Úřad vlády České republiky, 2020).

79 Patricia Dobříková, Barbora Mešková and Jana Brtáňová, "Depression syndrome and demoralization syndrome in palliative care settings," in *Proceedings from the 7th International Conference of Hospice and Palliative Care*. (Olomouc: Solen, 2015).

Melanie Harling et al., "Psychosocial stress, demoralization and the consumption of tobacco, alcohol and medical drugs by veterinarians." *J Occup Med Toxicol* 4, no. 4 (2009): <https://doi.org/10.1186/1745-6673-4-4>

Data from CVVM (2020) shows that when assessing the situation in their place of residence, a significantly smaller part of the Czech population, representing less than half (47%), perceives the drug situation as a problem. Only 14% of Czech citizens do not see drug use as a problem in the Czech Republic, a little more than two fifths (42%) do not evaluate the situation as a problem when looking at the place where they live (sums of answers „rather not a problem“ and „definitely not a problem“). Regarding the place of residence, drug use is perceived significantly less as a problem by respondents from municipalities and cities with less than 2,000 inhabitants. Regionally, the local situation is perceived as problematic more often in the Karlovy Vary and Ústí nad Labem regions, on the contrary, it is less often assessed by the inhabitants of the Hradec Králové and Liberec regions in this way.<sup>80</sup> From our data it is evident that the Moravian-Silesian region shows a low score for drugs (from: -3.0263), while the Vysočina region shows a high score (from: 3.5129). As for the threat of alcohol, the Vysočina region achieves a high score (from: 3.6931 \*\*\*). A statistically significant difference was also recorded for the tobacco threat, in the Plzeň region the score was negative (from: -3.1094 \*\*) and on the contrary in the Liberec region positive (from: 2.6804 \*\*). In terms of drug threats, the Vysočina region (from: 3.8584 \*\*\*) is worth mentioning. As can be seen from the data, the least threatened by addictive substances is felt by people in the Vysočina region.

### Conclusion

Social and health threats, even those which are felt only subjectively, is going to be a significant factor influencing instrumental moral values. Moreover, if our theoretical assumption concerning the connection between instrumental moral values and (at least several) outer moral norms were correct. We could extend this hypothesis on these moral norms, too. So we can state the values are influenced by both real and 'felt only'. It seems important to continue researching the relationship between the inner value system and outer moral norms (and those which are also legal norms). This research could reveal other causes of internal personal conflict and show more details in the relations between the value system and both 'only felt' and real threats.

But, there is one more impact of our results we should discuss. If we accept there are no differences in experiencing both real and imaginary ('only felt') threats in both variables in the hypotheses we tested in this paper can be understood as dependent. That leads us to consider the opposite influence, when the value system of a person influences the threats recognition and the feeling of threat. The mutual influence opens many more questions for future research because the role of values will not only be passive in this recognition. The values, according to the existence of imaginary threats, could play a very strong and active role.

### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

80 Martin Spurný, "Názor občanů na drogy – květen 2019." Tisková zpráva. Centrum pro výzkum veřejného mínění, Sociologický ústav AV ČR, v.v.i.

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## SPIRITUALITY AS A MEANING IN LIFE FACILITATOR IN ONCOLOGICAL PATIENTS

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## Abstract

**Background:** An oncological disease influences directly how the meaning in life is perceived. It has become apparent that spirituality supports this perception and thus may become a factor of forming the general meaningfulness despite the unfavourable circumstances. The objective of the present literature review is to analyse the articles on the relationship between spirituality and the meaning in life in cured oncological patients.

**Methods:** The search was conducted in Web of Science, Scopus and Science Direct databases, and quantitative as well as qualitative studies were included (N=952). The criteria for exclusion were patients' age under 15, terminal stage of disease, absence of completed treatment of cancer, brain cancer; studies which did not deal with the relationship between spirituality and meaning of life were also excluded.

**Results:** Detailed analysis was conducted in case of 8 research studies, based on which the following thematic areas were identified: spirituality as a coping mechanism in forming the meaning in life, spirituality as individual personality transformation factor and spirituality as a direct source of meaning.

**Conclusion:** The study proved the importance of spirituality in forming the meaning in life in cured oncological patients and the need for further research in this area. Spirituality support and development should form an essential part of work with oncological patients.

**Keywords:** Spirituality – Coping – Meaning in life – Oncological patient.

## Introduction

Viktor Frankl pointed out the fact that meaning in life is an important need which can be achieved despite suffering and various unfavourable circumstances in one's life.<sup>82</sup> If suffering can become an impulse for transformation of individual personality in a positive way, understanding and proper grasping of the mechanism in which it takes place, may be essential in working with the suffering individuals. It becomes particularly important in the fields such as healthcare, social, psychological and spiritual care of a person. The discussion about the meaning in life and questions regarding spirituality and its role in shaping the meaningfulness is thus becoming particularly relevant here. The analysed studies and scientific work of the authors show that spirituality can be a trigger of the crisis of meaning in critical situations. What can look contradictory at first

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82 Viktor Frankl, *Utrpenie z nezmyselného života*, 1st ed. (Bratislava: Lúč, 2013); Viktor Frankl, *Hľadanie zmyslu života* (Bratislava: Eastone Books, 2011).

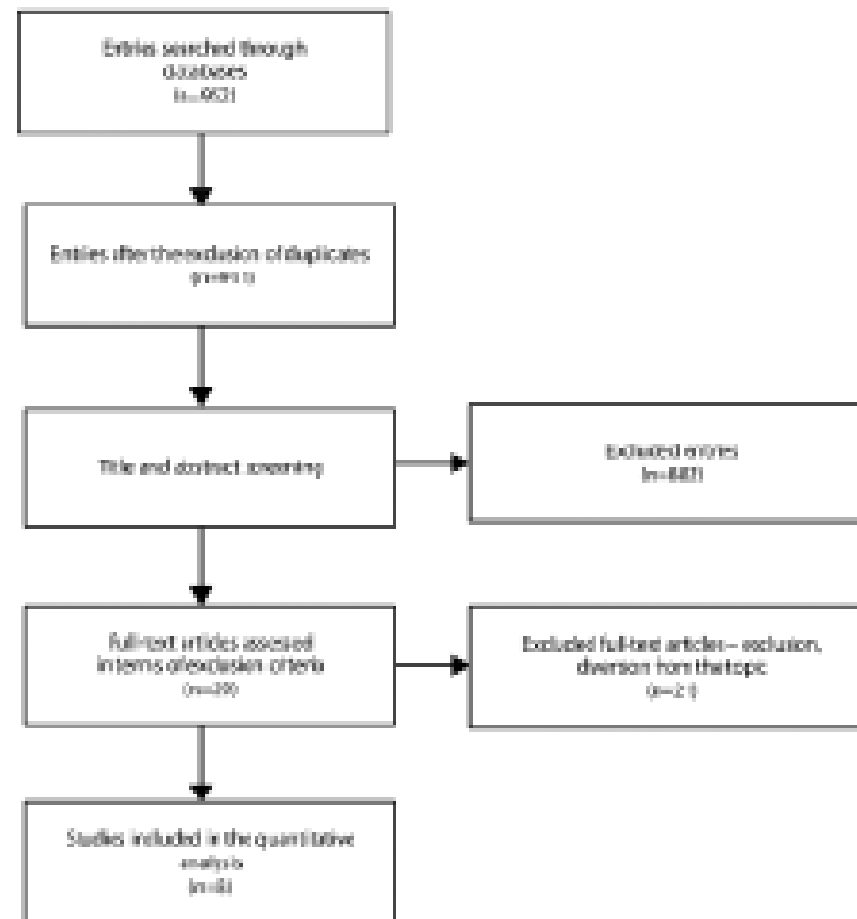
glance, then allows overall personality transformation facing the new reality. At the same time, it can serve as a coping mechanism in adapting to a new suddenly emerging situation. Successful adaptation to adverse life is accompanied by personality growth despite the situation itself. "Spirituality has existential basis, including search for the meaning and creating of the meaning in individual's life and of the world related to the context of immaterial connection to something or somebody greater than oneself."<sup>83</sup> The importance of transcendence and connection to something that transcends an individual is emphasized by Michal Steger. For him, spirituality is an extension where the meaning can be reached. The term itself covers religious activities as well as transcendental and individual experience.<sup>84</sup> However, spirituality does not necessarily have to be identified with religiousness. It has become apparent that transcending a purely individual aspect and creating a relationship with something that transcends an individual as such support search for and finding of the meaning; therefore, spirituality often inosculates with the concept of the meaning in life. Spirituality thus may facilitate the formation of meaning in life.<sup>85</sup>

**Methods**

Articles were searched for in Web of Science, Scopus and Science Direct databases. The search was conducted using the keywords cancer survivor AND spirituality AND coping AND meaning. The word "coping" was also used in the search as the influence of spirituality and meaning is particularly visible in coping with difficult situations in life, where an oncological disease belongs without any doubts. No limits were specified in relation to the year of publication of the studies and both quantitative and qualitative studies were analysed. The criteria for exclusion were patients' age under 15, terminal stage of disease, absence of completed treatment of cancer, brain cancer; studies which did not deal with the relationship between spirituality and meaning of life were also excluded. The final search produced 952 studies, including duplicates. 911 studies remained after duplicate studies were excluded; subsequently, 882 studies were excluded after analysis focused on titles and abstract and 29 studies remained. Exclusion criteria and diversion from the topic of literature review led to exclusion of further 21 studies. Finally, 8 research studies were included in the analysis (see Figure 1). The objective of the study was to find an answer to the question: "What is the relationship between spirituality and the meaning in life in cured oncological patients?"

After analysis of the 8 studies, the following thematic areas were identified: 1) spirituality as a coping mechanism leading to the meaning in life; 2) spirituality as a transformation factor; 3) meaning as a source of spirituality.

**Figure 1**



**Spirituality As a Coping Mechanism Leading to the Meaning in Life**

Spirituality correlates to the meaning in life.<sup>86</sup> This was confirmed by a study aimed at the comparison of personal meaning, spirituality, experienced stress and anxiety in female breast-cancer survivors and in healthy females. The group of female breast-cancer survivors showed higher levels of spirituality and perceived personal meaning. Within this group, the higher levels of perception of the meaning in life were reported in participants with children. The study confirmed correlation between spirituality and the meaning in life (r=0.43). Psycho-spiritual factors had inhibiting effect in the context of stress-producing situations. In the study, Woo<sup>87</sup> also confirmed that presence or absence of children in female respondents' lives had impact in relation to oncological diseases. Children can thus be considered a source of spirituality as regards the existence of social supportive relations. Presence of a child in individual's life implies the formation of aware-

83 Susan Bauer-Wu and Carol Farran, "Meaning in Life and Psycho-Spiritual Functioning: A Comparison of Breast Cancer Survivors and Healthy Women", *Journal of holistic nursing: official journal of the American Holistic Nurses' Association* 23 (July 2005): 175, <https://doi.org/10.1177/0898010105275927>

84 Michael Steger, "Experiencing meaning in life: Optimal functioning at the nexus of spirituality, psychopathology, and well-being", *The human quest for meaning*, (January 2012): 165-84.

85 Paul T. P. Wong, "Implicit theories of meaningful life and the development of the personal meaning profile", in *The human quest for meaning: A handbook of psychological research and clinical applications* (Mahwah, NJ, US: Lawrence Erlbaum Associates Publishers, 1998), 111-40; Michael F. Steger, Matthew J. Bundick, and David Yeager, "Meaning in Life", in *Encyclopedia of Adolescence*, ed. Roger J. R. Levesque (New York, NY: Springer, 2011), 1666-77, [https://doi.org/10.1007/978-1-4419-1695-2\\_316](https://doi.org/10.1007/978-1-4419-1695-2_316)

86 Bauer-Wu and Farran, "Meaning in Life," 175.

87 Bauer-Wu and Farran. "Meaning in Life," 175.

ness of a commitment and transcends an individual life. The authors understand the meaning in life as an integral component of spirituality.

An oncological disease itself very often means questioning of previously formed meaning in life and also is an impulse for a spiritual crisis. An individual often seeks answers to questions like: *Why just me? Can God exist, if he let me get ill?* or deal with other existential topics related to their illness. It has become apparent that deriving the meaning in life from oncological experience and re-arrangement of life values towards the personal growth despite unfavourable circumstances are associated with individual evaluation of the situation that has occurred in the life of an individual. This is also supported by the work of Frankl who claimed that people were always free to adopt an attitude from which the quality of their lives would be derived.<sup>88</sup>

In their qualitative study, Ferrell et al.<sup>89</sup> pointed out that female patients with ovarian cancer perceived their spirituality as an adaptation mechanism. They considered it a way to derive the meaning from their experience with cancer. Spirituality thus becomes a facilitator of the process of a positive assessment of an existential situation. There are many statements pointing to the importance of spirituality in lives of female patients with ovarian cancer. The study was based on an analysis of correspondence with female patients that took place between 1994 and 2000. The respondents described their diseases as a “cycle of treatment, remission, relapse and treatment.”<sup>90</sup> Perception of chronicity of the disease in female respondents was associated with stress, anxiety and uncertainty. In spite of this fact, it was such experience which often led them to finding the deep meaning and to appreciation of life. Many females approached the possibility of relapse into ovarian cancer with “philosophy focused on living their lives to the fullest and appreciating their families and friends without obsessing about cancer which threatened their lives.”<sup>91</sup> The respondents not only relied on spirituality as a possibility of finding the meaning in the disease, but also saw it as a source of hope in the process of a life-threatening situation. They also found the meaning in life through communication with other females with similar experience. The aspect of transcending the purely individual dimension of the disease and connecting to a higher dimension, in this case other people with similar experience or search for an alternative treatment of the disease, had a transcendent nature for the female respondents. It was also pointed out in the study, that a part of the respondents with high levels of perceived spirituality reacted to the confrontation with the disease by loss of belief, uncertainty and hopelessness. Spirituality thus causes a crisis of experienced meaning which may be a factor of positive transformational change, thus helping to form a new meaning in life despite the disease.

In her study, Maria Saarelainen<sup>92</sup> described a religious, spiritual and secular meaning, claiming that in order to achieve the meaning in individual's life, the mutual interaction of the three is necessary. She defined the meaning making process as the one, in which an individual is trying to renew the global meaning after it has been forcefully disturbed. Analysis of respondents' stores showed they were able to find meaning in relation to their oncological experience, with

88 Frankl, *Hľadanie zmyslu života*, (Bratislava: Eastone Books, 2011).

89 Betty Ferrell et al., “Meaning of Illness and Spirituality in Ovarian Cancer Survivors,” *Oncology nursing forum* 30 (March 2003): 249–57, <https://doi.org/10.1188/03.ONF.249-257>

90 Ferrell et al., “Meaning of Illness and Spirituality,” 255.

91 Ferrell et al., “Meaning of Illness and Spirituality,” 255.

92 Sivi-Maria Saarelainen, “Emerging Finnish Adults Coping with Cancer: Religious, Spiritual, and Secular Meanings of the Experience,” *Pastoral Psychology* 66, no. 2 (April 2017): 251–68, <https://doi.org/10.1007/s11089-016-0735-z>

spiritual meaning being important in the context of reducing the impact on identity reshaping and in association with important relationships in individuals' lives. According to Tatiana Schnell, the crisis in individual's life occurs, if they are not able to renew the continuity in the perception of the meaning.<sup>93</sup>

All the described aspects have a common extent of transcendence which leads to detachment from problems related to the disease and to transformation of a negative experience related to an oncological disease to a positive one. The author also pointed out that experiencing of the meaning in any area had a function not only in the area of coping, but also in the area of individual personal growth. Spirituality or spiritual meaning are related to individual's identity transformation. The disease itself presents a stressful situation, which, in case of an oncological disease, often means a change in physical appearance and great demands on mental resilience of an individual who is forced to cope with these facts. In order to cope with the disease and life with this diagnosis, it is important to come to terms with a certain stigma brought by an oncological disease. About half of the respondents reported that cancer presented a change for them which led to a new personal growth. From their point of view, it was finding of certain “inner strength” – existential joy which provided them with answers to important fundamental questions brought about by the disease. Perception of their own inner strength helped the respondents to come to terms with their disease.

Importance of interpersonal relationships is another aspect of spirituality and meaning pointed out in the study. Quality interpersonal relationships, be it peer, family relationships or relationships with people having similar problems, were viewed as strongly supportive. For many of them, peer support represented the meaning brought to them by the disease. The sense of belonging somewhere and being accepted were of central importance in this case. Family and relationships helping the respondents to experience normal lives and transcend their individual situations were viewed as the greatest source of emotional support.<sup>94</sup> Various hobbies like hiking or reading books focused on spiritual topics created certain peace zones; zones which were making them forget about their disease. According to Špatenková et al. who conducted their study on oncological patients, “total of 9 respondents out of 40 found doing leisure time and recreational activities to be a significant problem, while 10 respondents reported minor problems in this area.”<sup>95</sup> While working with oncological patients, it is, therefore, very important to focus on factors which make it impossible to find satisfaction in this area and on looking for new areas which might provide the “peace zone”. According to Maria Saarelainen,<sup>96</sup> all three types of meaning – religious, spiritual and secular interact together. According to the author, finding answers to existential questions related to the disease and forming the coherent life narrative, including the reflection on the oncological disease, are the conditions of achieving the secular meaning. In her study, the author found out that while the religious meaning was purely a source of the meaning connected to the cancer experience, the spiritual meaning was described in connection with a permanent change. Combination of both types of meaning led to self-actualisation of an individual and to finding internal sources that had had a supportive function throughout the

93 Tatjana Schnell, *Psychologie des Lebenssinns* (Berlin: Springer, 2016).

94 Saarelainen, “Emerging Finnish Adults Coping,” 251–68.

95 Naděžda Špatenková, Petra Šmičková, and Ivana Olecká, “Sociální problémy onkologicky nemocných: využití posuzovacího nástroje SDI-21 v klinické praxi,” *SOLEN*, (November 2018): 41, <https://www.solen.sk/casopisy/paliativna-medicina-a-liecba-bolesti/socialni-problemy-onkologicky-nemocnych-vyuziti-posuzovaciho-nastroje-sdi-21-v-klinicke-praxi>.

96 Saarelainen, “Emerging Finnish Adults Coping,” 251–68.

disease. The spiritual meaning was of strong existential relevance, while the secular meaning “often occurred as a result of the spiritual process”.<sup>97</sup> The spirituality concept includes religious, existential and atheistic dimensions; the process of meaning formation thus takes places at all these dimensions – depending on the individual’s view of the world.

### **Spirituality As a Personality Transformation**

Stress arising from the disease can be a part of a positive personality change. Many studies point out the distinct transformational character of spirituality and religious rituals. The presence of spirituality is related to a more positive perception of the disease. Formation of a more positive view of the situation can help with better adaptation to cancer. Gall and Cornblat<sup>98</sup> pointed out the fact that religious-spiritual sources can serve to support the formation of meaning or purpose in life. In their study, they aimed to understand the roles of religiousness and spirituality in adaptation to the disease and in the meaning-making process. The results of their qualitative study showed that religion and spirituality are helpful in changing the cognitive framework of perceiving the life-threatening disease in a positive way, just like in case of reconstruction of the meaning from the negative experience. The relation to transcendence, something that transcends a person, has supportive effect. The authors claim that “most of the survivors who turned to God had not asked for a specific miracle but had only looked for support and comfort.”<sup>99</sup> Spirituality is helpful in structuring the meaning in life and makes it easier to understand what is happening in one’s life. One needs and looks for support in coping with a difficult life situation. Vertical as well as horizontal transcendence of one’s life helps the individual to derive the meaning even from seemingly absurd and negative experiences. Perception of one’s life as coherent and belonging to a larger whole – community, God, nature – supports formation of active approach to the disease. This allows an individual to actively participate in formation of their life despite the disease. In their testimonies, female respondents saw the meaning in life as being formed in a broader spiritual context and partly in relation to a higher power. Adopting a positive approach meant willingness to fight the disease and to live despite being ill.<sup>100</sup> The sense of interconnection related to the experienced spirituality led to the awareness of the value of relationships with other people and the importance of community, which made it possible to integrate a negative experience and to view it as meaningful. In the study, spirituality is viewed as a stable framework of coping with the situation and a source that can help to derive the meaning from it. In their cognitive model of religious/spiritual factors, Gall and Cornblatt recognise the following sources of spirituality: social support, religious activities and relationship with God. Through religious activities (prayer, meditation, etc.), the respondents were not seeking help in a physical or emotional sense, but they were rather trying to understand what was happening to them. Shared prayers for health then brought sense of solidarity to them. Self-help groups also contributed to the sense of sharing the situations they experienced. This study highlighted the importance of social relations in lives of oncological patients and considered those an important part of spirituality. Holistic aspect of connection to something transcendent, be it a relationship with family, friends, nature or God, is a necessary feature of spirituality as well as of the formation of the meaning in life. It

97 Saarelainen, “Emerging Finnish Adults Coping,” 264.

98 Terry Lynn Gall and Mark W. Cornblat, “Breast Cancer Survivors Give Voice: A Qualitative Analysis of Spiritual Factors in Long-Term Adjustment,” *Psycho-Oncology* 11, No. 6 (December 2002): 524–35, <https://doi.org/10.1002/pon.613>

99 Gall and Cornblat, “Breast Cancer Survivors Give Voice,” 527.

100 Gall a Cornblat, “Breast Cancer Survivors Give Voice,” 527.

is associated with the relationship “that nurtures and supports the inner spirit of an experiencing person to grow”.<sup>101</sup>

The above-mentioned personal sources helped to reassess the experience with cancer and to reprioritise the values of research participants in an effort to find the real essence of their own lives. Integration of traumatic experiences helped to form the meaning in life and induced personality growth in more than one half of the respondents. It was not only a passive attitude, but also an active strategy of searching for and forming of the existential meaning. The transformation to a “better person” was associated with formation of the meaning resulting from mutual care in a community and serving others.<sup>102</sup>

### **Meaning As a Spirituality Dimension**

According to Park and Cho,<sup>103</sup> spirituality consists of two parts – spiritual well-being and lack of spirituality. The authors view the category of existential meaning as a subscale of spiritual well-being. The hypothesis that better adaptation to the conditions following an oncological treatment in respondents depends on the level of their spiritual well-being was confirmed by the authors. Those who strongly felt they had meaning in their lives did not lack in spiritual area. The subscale of meaning/peace correlated negatively with lack of spirituality. In the study, it was not associated with any specific religious tradition, but rather represented a general reflection on the feeling that “human life is filled with purpose and is full of inner peace.”<sup>104</sup> The overall level of perceiving the meaning in life can thus contribute to increased perception of spirituality. If an individual views their life as meaningful, they are not motivated to look for spirituality, as they do not feel the lack of spirituality. Experiencing the existential meaning contributes, in greater extent than belief itself, to several adaptation dimensions – in mental, social and health areas. This finding explains the importance of spiritual well-being to the quality of life. The study also points out the fact that a certain level of lack of spirituality at the beginning of the disease can motivate to look for the meaning in life and to try to cope with the disease in a positive way. The lack of spirituality in respondents correlated with anxiety and posttraumatic stress syndrome or fear of relapse. A low level of lacking in spirituality was already related to the presence of “spiritual distress”.<sup>105</sup> This especially applied to those who completed chemotherapy and were strongly religious. The subscales of meaning/peace and lack of spirituality correlated positively with personality growth following the oncological treatment. Knowledge that the lack of spirituality can, to a certain extent, be an evaluation process leading to the formation of meaning, reshaping of cognitive frameworks and value orientation, has been confirmed by several of the analysed studies. The fact that an individual with a high level of spirituality can initially view their disease as a betrayal, equalization of the formed meaning and certainty in life was also pointed out by Bauer Wu and Farran.<sup>106</sup> This finding increases the significance and importance of the search for meaning and recreating the personal coherence in the process of life-threatening event

101 Gall and Cornblat, “Breast Cancer Survivors Give Voice,” 529.

102 Gall and Cornblat, “Breast Cancer Survivors Give Voice,” 529.

103 Crystal L. Park and Dalnim Cho, “Spiritual Well-Being and Spiritual Distress Predict Adjustment in Adolescent and Young Adult Cancer Survivors,” *Psycho-Oncology* 26, no. 9 (2017): 1293–1300, <https://doi.org/10.1002/pon.4145>.

104 Park and Cho, “Spiritual Well-Being,” 1298.

105 Park a Cho, “Spiritual Well-Being,” 1298.

106 Bauer-Wu a Farran, “Meaning in Life,” 175.

or experience.<sup>107</sup> It is essential to realise that the presence of faith, religious belief or another form of spiritual orientation can have counterproductive effect at an early stage of oncological disease and contribute to the origination of spiritual crisis. It has become apparent that effective and understanding intervention at this point can help the individual to improve the quality of their life, come to terms with the presence of their disease and find the meaning in this negative experience.

Anja Visser et al. pointed out the importance of spirituality and subsequent construction of the meaning in coping with stressful situations.<sup>108</sup> In their study, the meaning is considered a spirituality subscale. The study was primarily aimed at finding about the influence of stress on well-being in oncological patients; the spirituality was measured using SAIL (Spiritual Attitude and Involvement List). The aspect of meaningfulness measures individual's sense of purpose and meaning in life. Well-being was assessed using HDI (Health Dynamics Inventory) and its aspect of Joy in Life (JiL). Strong positive correlation was found between SAIL (meaningfulness) and JiL (joy). In her study, the author pointed out the fact that individual spirituality subscales, including meaningfulness, contribute to connection to the overall – general – meaning. Experiencing the existential well-being is identified with experiencing the purpose and meaning in life and it is pointed out that the extent of experienced meaningfulness reflects it. In the study by Saarelainen,<sup>109</sup> experiencing of joy is associated with finding of the inner strength necessary to answer important existential questions presented by an oncological disease. Positive correlations of SAIL subscale of meaningfulness with the aspect of joy in life prove the importance of reaching the meaningfulness in lives of oncological patients. The meaning itself inosculates with the concept of spirituality and it is adequate to conclude that “the meaning in life is more similar to spirituality than to well-being in life”.<sup>110</sup> The results of other studies also point out that the meaning in life is a predictor of satisfaction in life and self-respect.<sup>111</sup> Other findings among chronically ill indicate that increased self – efficacy could as a mediator in the relationship between life meaning and psychological distress.<sup>112</sup> Increased sense of control is considered to be an important factor of better adjustment.<sup>113</sup> Spirituality is shown through attitudes and activities, such as experiencing of the meaning, attitudes of compassion and contemplative activities. Just as in the case of her previous study,<sup>114</sup> Visser used SAIL to measure spirituality in her study in 2018 as well. Six

107 Aaron Antonovsky, “The Structure and Properties of the Sense of Coherence Scale”, *Social Science & Medicine* 36, no. 6 (March 1993): 725–33, [https://doi.org/10.1016/0277-9536\(93\)90033-Z](https://doi.org/10.1016/0277-9536(93)90033-Z)

108 Anja Visser, Bert Garssen, and Ad Jjm Vingerhoets, “Existential Well-Being: Spirituality or Well-Being?”, *The Journal of Nervous and Mental Disease* 205, no. 3 (2017): 234–41 <https://doi.org/10.1097/NMD.0000000000000617>

109 Saarelainen, “Emerging Finnish Adults Coping,” 251–68.

110 Visser, Garssen, and Vingerhoets, “Existential Well-Being,” 234.

111 Peter Halama and Maria Dědová, “Meaning in life and hope as predictors of positive mental health: Do they explain residual variance not predicted by personality traits?” *Studia Psychologica* 49 (January 2007): 191–200.

Jana Vindišová, “Psychosocial model of distress in multiple sclerosis patients,” *Československá psychologie Report* 56, 206 – 220.

112 Anja Visser et al., “Does spirituality reduce the impact of somatic symptoms on distress in cancer patients? Cross-sectional and longitudinal findings,” 214 (August 2018): 57 – 66, <https://doi.org/10.1016/j.socscimed.2018.08.012>

113 Jana Jánošová (Vindišová), “Control cognitions as predictors of distress in a cross-cultural context” *Health psychology Report* 2, no. 4 (2014): 227 – 236, <https://doi.org/10.5114/hpr.2014.46363>

114 Anja Visser, Eltica Jager Meezenbroek, and Bert Garssen, “Does spirituality reduce the impact of somatic symptoms on distress in cancer patients? Cross-sectional and longitudinal findings”, *Social Science & Medicine* 214 (August 2018): 57 – 66, <https://doi.org/10.1016/j.socscimed.2018.08.012>

spirituality aspects were assessed in relation to two directions – Meaningfulness, Acceptance and Care for Others (situational assessment) and Connectedness to Nature, Transcendental Experiences and Spiritual Activities (self-regulatory effect). The findings show that the coping effect in the process of disease is associated with initial situational assessment of the disease, where the spirituality itself and its aspect of meaningfulness may function in two ways. “Experiencing life as meaningful and ability to accept that life has both positive and negative aspects can help to reassess the symptoms, such as tiredness – a part of cancer or life as such – thus not causing further suffering.”<sup>115</sup> The presence of spirituality can also result in a spiritual crisis due to a conflict caused by the presence of a terminal disease and belief in an omnipotent and loving divine entity. Several of the analysed studies point out that a certain extent of spiritual crisis is necessary in the process of situational reassessment and triggering of the process of search for the meaning.

Spirituality thus is a multidimensional construct. According to Yanez et al.,<sup>116</sup> it comprises existential as well as religious dimension. These authors consider meaning/peace to be a spirituality subscale defined under the Functional Assessment of Chronic Illness Treatment Scale (FACIT). Spiritual personal well-being (FACIT-Sp) reflects the sense of purpose and meaning in life and is not associated with any specific religion. Their findings point out the correlation between the presence of meaning in life and decrease of depressive symptoms at an early stage of the disease connected to increased vitality. A negative correlation was found for the relationship between belief and depression. The stronger a person's belief is, the more they tend to suffer from depression at early stages of the disease. This is typical for the first 6 months of having an oncological disease. In this case, mental state of an individual also depends on the level of perceived meaning. This finding corresponds to the knowledge that spirituality itself can also trigger the spiritual crisis due to a confrontation of two contradictory narratives – narrative of existential safety and narrative of a sudden harm in life. Reaching of existential well-being, which is associated by several authors with finding answers to existential questions, then presents a condition for emotional transcendence of physical consequences brought by an oncological disease. Finding of the existential meaning correlates with positive quality of life. The analysed studies point out the fact that belief itself does not have to be sufficiently saturating in confrontation with an oncological disease. If there is no meaning or a sense of purpose in life, it will most probably lead to a conflict. Finding the meaning, as a potential result of this conflict as well as of a spirituality aspect, is a condition for growth. Strengthening of belief is a condition for personality growth, especially in situations where one has not perceived their life as meaningful. On the other hand, presence of meaningfulness in life meant that individual did not only have to rely on their belief to come to terms with an oncological disease. Finding the meaning in life has a long-term effect on coming to terms with an oncological disease, while personal religiousness in form of a belief is mostly related to coming to terms with the disease from a short-term point of view. This has also been pointed out by Maria Saarlainen<sup>117</sup> who views the religious meaning as connected to a situational assessment. Transition to internal sources, such as meaning and peace, is seemingly an adaptive strategy related to coming to terms with unfavourable fate.

115 Visser et al., “Does spirituality reduce the impact of somatic symptoms,” 62.

116 Betina Yanez et al., “Facets of Spirituality as Predictors of Adjustment to Cancer: Relative Contributions of Having Faith and Finding Meaning,” *Journal of Consulting and Clinical Psychology* 77, No. 4 (August 2009): 730–41, <https://doi.org/10.1037/a0015820>

117 Saarelainen, “Emerging Finnish Adults,” 251–68.

### Discussion

An oncological disease places demands on an individual, such as coming to terms with a change in identity, anxiety and fear of death, and coming to terms with secondary aspects of the treatment, such as pain, depression and changes in routine life. However, it has become apparent that the life-threatening disease can also be viewed positively. It is obvious from the analysed studies, that negative experiences can lead to the rearrangement of values and personality transformation resulting in viewing these experiences in a wider context.<sup>118</sup> The fact that traumatic events can contribute to search for and finding of the meaning in life, thus contributing to finding of inner calm and peace has already been pointed out by Frankl.<sup>119</sup> The role of spirituality in this process is to connect an individual with something that is greater and more complex than them and their existence. Transcendence of a purely individual dimension is then essential in order to form the meaning in life. Spirituality allows strengthening of the relationship towards oneself, others and nature, or a relationship towards a metaphysical reality or entity. In this way, it affects intrapersonal, interpersonal as well as transpersonal dimensions.<sup>120</sup> Viewing unfavourable events in a wider context helps an individual to integrate them into their own life story and understand them in the context of their own life. The fact that the meaning in life is especially objectivized when one faces a danger to their life has been confirmed by several authors.<sup>121</sup>

It is obvious that spirituality is a multidimensional construct that participates in formation and recreation of the meaning in life in unfavourable situations in life. In the analysed studies, the meaning in life has often been perceived as an integral part of spirituality and the presence of spiritual approach to reality as an important coping mechanism. Personal spirituality helped the individuals to reassess the experienced stressful situation, adapt better to its occurrence and to a personality growth. Spirituality comprises atheistic, religious as well as existential dimension. The meaning is formed individually in each dimension, with the individual types of the formed meaning in mutual interaction. The analysed studies pointed out the importance of transcendence as an important feature of a spiritual attitude. Transcendence of individual stance and focus on something greater than one's own person and immediate situations related to an oncological disease, has often helped to simplify the process of viewing one's disease in a wider context. Formation of a coherent and comprehensible life narrative is a condition to cope with stressful situations. It is necessary to initiate an identity reshaping process to form the meaning and life and get a positive grasp of the disease itself. Cancer is very often associated with negative physical consequences, such as amputations, hair loss, confinement to the wheelchair, etc. These changes in a physical appearance are closely related to the formed identity of an individual and can present a secondary source of stress and anxiety. Support of a positive transformation of attitude towards one's own identity can help an individual to cope with a terminal disease and significantly improve the quality of their life. Throughout the process, finding answers to existential questions raised by the disease presents an important aspect of a transformative change towards reaching situational and global meaningfulness. The transformation itself is associated with a sense of belonging to a greater whole which can be personified in a divine entity, nature, interpersonal relationships or meditative or religious activities. As the analysed studies show, individuals who overcome this change perceive it as a positive turnabout in their lives. Despite the

118 Bauer-Wu and Farran, "Meaning in Life," 175.

119 Frankl, "Utrpenie z nezmyselného života," (Bratislava: Lúč, 2013); Frankl, "Hľadanie zmyslu života," (Bratislava: Eastone Books, 2011).

120 Reed in Bauer-Wu and Farran, "Meaning in Life," 175.

121 Frankl, "Utrpenie z nezmyselného života," (Bratislava: Lúč, 2013); Steger, "Experiencing meaning in life"; Irvin D. Yalom, *Existenciální psychoterapie*, 1st ed. (Praha: Portál, 2006).

unfavourable diagnosis, they are able to assess their lives as meaningful and view their disease as an important part of their lives. It is at this point, where the importance of a holistic approach to existential dimensions of the disease like cancer comes to the fore. The change of identity triggered by this process (its strengthening) can subsequently mean setting of goals that an individual can achieve despite their disease. This fact contributes to the decrease of frustration and improvement of confidence due to the elimination of the feeling of helplessness. The overall cognitive reframing related to the oncological experience leads to the formation of a strong sense of coherence (SOC)<sup>122</sup> and to viewing of the life as meaningful. Finding of a spiritual meaning often resulted in finding of a secular one. The analysed studies point out the fact that the meaning in life is often identified with the area of spirituality. In most cases, the presence of a spiritual relationship to the reality means better adaptation to the new situation. The presence of spirituality can also trigger a crisis representing the initiation of the process of meaning making and formation of a coherent life narrative despite the terminal disease. It is in this process of formation of the meaning in a seemingly absurd situation, where it is essential to give an individual a helping hand. At the same time, it has become apparent that strengthening of spirituality and spiritual attitude is an important social aspect, even in the context of broader life within a family.<sup>123</sup>

### Conclusion

An oncological disease is often accompanied by a decrease in the overall quality of life. The analysed studies point out the importance of spirituality and life meaningfulness in connection with finding answers to existential questions raised by the disease. Reassessment of one's life, recreation of a coherent life narrative despite the life-threatening disease and ability to find connection with something that transcends a specific individual improve the overall quality of life. Sources which may help an individual to do so can be supportive relationships around them, community, sense of belonging somewhere, etc. Thanks to them, a person can live a full life despite the unfavourable circumstances. It can be concluded that supporting the spirituality and finding of the meaning in life in its context is an important area in the therapy of and psychological care for oncological patients. However, it is also good to view the strengthening of the perception of meaningfulness and spirituality in life in a global context. The present study shows that the spirituality itself is an important coping mechanism and, as such, it allows reflection as well as reassessment of negative experiences. This contributes to a transformation of individual's personality in a positive direction. Creative adaptation to a newly-emerged situation allows the formation of the meaning and finding of alternative life goals that are compatible with the situation. Apart from the formation of the meaning in life, the entire process also results in strengthening of self-respect of individuals and finding of satisfaction in their lives.

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All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

122 Antonovsky, "The Structure and Properties," 725-33.

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**CONFLICT OF INTEREST**

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

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**GUARDIAN AD LITEM AND INTERVENTION BY THE GUARDIAN AD LITEM ASSURING THE BEST INTERESTS OF THE CHILD DURING REGULATION OF RIGHTS AND DUTIES TOWARDS CHILDREN**

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**Abstract**

**Background:** Social-legal protection of children is an important matter in modern society, which implements principles assuring the best interests of children into its legal regulations. In Slovakia, social-legal protection of children is chiefly assured by social workers of the Office for Labour, Social Affairs and Family, Department of Social-Legal Protection of Children and Social Guardianship. Intervention carried out by the social worker – guardian ad litem during regulation of rights and duties towards children, pursues the best interests of the child.

**Methods:** The primary method is univariate analysis of secondary data on intervention by social workers from the Office for Labour, Social affairs and Family, Department of Social-Legal Protection of Children and Social Guardianship. The purpose of this analysis was to establish the development of selected intervention indicators during the period from 2004 to 2019, which are crucial during the process of regulation of rights and duties towards children while assuring their best interests.

**Results:** The results of quantitative analysis pointed out the interest of the state in assuring additional staff for the Social-Legal Protection of Children and Social Guardianship Department, because protection of children is an important matter in relation to the protection vulnerable groups such as children. Despite the declining number of submitted petitions for regulation of rights and duties towards children, the number of children to whom a guardian ad litem was appointed by the Office for Labour, Social Affairs and Family is rising. We also registered increase use of institutions, which allow the child's opinion to be established, which creates opportunity for assurance of the child's best interests.

**Conclusion:** Children are considered individuals with their own rights and personal protection in modern-day society. The principle of the child's best interests is closely connected to parental rights and duties, which unavoidably leads the state to supervise their due execution in relation to care of the child. One important subject for European Commission is protection of children against adverse effects. Social-legal protection of children in the European Union is implemented into the relevant legal systems and its assurance is realised by means of the laws, decrees and regulations of the specific country, and also common conventions and agreements between member states.

**Keywords:** Best interests. Social-legal protection. Regulation of rights and duties.

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**Introduction**

Children require protection of their rights and legal interests and this is a matter for the state, which undertakes to generally provide children with personal protection. Application of the principle of the child’s best interests comes to the fore during this process. The formulation of “the child’s best interest” must be perceived complexly, flexibly and also adaptably, because its content is demined depending on the circumstances of the specific child. Multiple authors are of the opinion that if the parents endanger the welfare of their children, the state must act in the child’s best interests.<sup>125</sup> The best interests of the child is both internationally and nationally accepted as the most central, recurrent concept in modern legislation on childhood as well as in judicial praxis in matters concerning children and their legal status.<sup>126</sup> Pirošíková emphasises that the principle of the child’s best interests is an important principle not only in Slovak legislation, but also in international law.<sup>127</sup> Bagattini also considers protection of children an important subject for states, in which the welfare of children must be protected.<sup>128</sup> A child’s interests are emphasised in Slovak legislation in the amendment to Act No. 36/2005 Z. z. on Family in Article 5 (No. 175/2015 Z. z.), which exhaustively defines the criteria of a child’s interests.<sup>129</sup> according to Greene, the child’s best interests are also determined on the basis of an entire list of factors in other countries (for instance in the USA).<sup>130</sup>

Social-legal protection in Slovakia is primarily carried out by social workers of the Office for Labour, Social Affairs and Family, Department of Social-legal Protection of Children and Social Guardianship (hereinafter the “SLPCaSG”). The fact that great attention is focused on this area is also evidenced by the number of workers of the SLPCaSG Department, who ensure social-legal protection of children.

**Table 1. Number of workers of the Social-Legal Protection of Children and Social Guardianship Department**

	Year							
Number of workers	2004	2005	2006	2007	2008	2009	2010	2011
SLPCaSG	631	632	642	583	591	593	582	547
<i>of this DSLP</i>	407,4	416,2	433,2	399,7	398	405	401	368
<i>% representation</i>	64,56	65,85	67,47	68,55	67,34	68,29	68,90	67,27
	Year							
Number of workers	2012	2013	2014	2015	2016	2017	2018	2019
SLPCaSG	565	581	573	582	574	657	753	814
<i>z of this DSLP</i>	393	413	410	417	418	497	586	646
<i>% representation</i>	69,55	71,08	71,55	71,64	72,82	75,64	77,82	79,36

**Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic) 12-01 for the 2004-2019 period**

During the course of the 2004-2017 period, there was fluctuating development of the number of workers of the SLPCaSG department. Overall we registered an increase by 183 workers between 2004 and 2019 (an increase by 29.00%), however the number of social-legal protection of children workers increased by 238.6 (an increase by 58.7%) during the monitored period. The ratio of social-legal protection of children workers to the total number of SLPCaSG workers also increased during the monitored period and we registered values ranging from 64.56% in 2004 to 79.36% in 2019.

**Guardian ad litem**

If a situation in which the rights and legal interests of the parents - legal guardians of a child, who they represent, come into conflict with each other (just the assumption that these interests will come into conflict is sufficient), the law must react to such a situation.

In the event of a problematic situation between the parents of a child, the social worker primarily provides advice and the worker’s chief interest is to ensure the child’s best interests are being observed. Either of the parents can write and file a petition in matters of the upbringing and maintenance of children to the court of law with jurisdiction over the matter. A legal representative may also carry out these actions on the behalf of the parents of the child. The parents of the child may also as SLPCaSG to execute a petition in matters of upbringing and maintenance, whereas the social workers provide assistance during this action. Each petition for regulation of rights and duties towards the child responds to cardinal aspects, which are: to whose custody the child will be entrusted for upbringing, maintenance for the child and contact between the child and its parents, during which time the child’s best interests are taken into consideration. A summary of development of the number of executed petitions is given in Table 2.

125 See: M. Sormunen. Understanding the Best Interests of the Child as a Procedural Obligation: The Example of the European Court of Human Rights. In *Human Rights Law Review* 20, no. 4 (2020): 745–768, <https://doi.org/10.1093/hrlr/ngaa034>; see: A. Bagattini. Child Well-Being: A Philosophical Perspective. In *Handbook of Child Well-Being: Theories, Methods and Policies in Global Perspective*. Dordrecht: Springer (2014): 180-181.

126 H. Tolonen, S. Koulu, and S. Hakalehto. Best Interests of the Child in Finnish Legislation and Doctrine: What Has Changed and What Remains the Same? In *Children’s Constitutional Rights in the Nordic Countries* (2020): 159–184. [https://doi.org/10.1163/9789004382817\\_010](https://doi.org/10.1163/9789004382817_010)

127 See: M. Pirošíková, M. Protection of Children’s Human Rights in the Council of Europe Member States. *Societas. Et Iurisprudentia* 3, no. 3 (2015): 202-216. <https://sei.iuridica.truni.sk>; see: R. Lapko, Family and marriage in the book of Tobit: sociological and anthropological aspects (Kraków: Wydawnictwo Karmelitów Bosych, 2011); see: J. Fenik and R. Lapko. “Vino zachované až na túto chvíľu: analýza a návrh prekladu Jn 2,10,” *Slavica Slovaca* 54, no. 2, (2019): 142–148.

128 See: A. Bagattini. Child Well-Being: A Philosophical Perspective. In *Handbook of Child Well-Being: Theories, Methods and Policies in Global Perspective*. Dordrecht: Springer (2014) 180-181.

129 See: Zákon č. 36/2005 Z.z. o rodine v znení zmien a doplnkov.

130 See: S. M. Greene, K. Sullivan and E. R. Anderson. Divorce and Custody. In Hersen, M., Gross, A. M. (eds.) *Handbook of Clinical Psychology*. Volume 2 Children and Adolescents. New Jersey: John Wiley & Sons (2008), 833-855.

**Table 2. Executed petitions in matters of the upbringing and maintenance during the process of regulation of the rights and duties towards children**

Cases	Year							
	2004	2005	2006	2007	2008	2009	2010	2011
Petitions	18671	22073	22774	23708	29091	29916	32409	28631
Petitions/ 1 SW	45,82	53,03	52,57	59,31	73,09	73,86	80,82	77,80
Cases	Year							
	2012	2013	2014	2015	2016	2017	2018	2019
Petitions	25588	14776	7367	4574	4006	3187	3273	2586
Petitions/ 1 SW	65,10	35,77	17,96	10,96	9,58	6,41	5,58	4,00

Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic) 12-01 for the 2004-2019 period

During the monitored period we registered a significant decline in the number of executed petitions in matters of upbringing and maintenance of children, from 18,671 petitions in 2004 to 2,586 petitions in 2019. This indicator, and also the increasing number of social-legal protection of children workers, is related to the number of executed petitions by one SLPC worker, this being a decrease from 45.82 (2004) to 4.00 (2019).

The executed petition for regulation of rights and duties (petition in the matter of upbringing and maintenance) is sent to the court with jurisdiction over the matter, which appoints the relevant SLPCaSG as the guardian ad litem of the child.

Within the meaning of the Family Act, social workers representing the child are in the position of guardian ad litem in the event that there may be conflict between the interests of the parents (parent) and the child, the parents are unable to represent their child in legal actions, as is the situation outside these circumstances. "The guardian ad litem is a procedural guardian "ad hoc" for specific actions or for specific legal actions. The function of guardian ad litem is to protect the rights and legal protected interests of the child during proceedings before a court of law the same matter, concerning the care of courts of minors in relation to approval of a legal action on behalf of a minor."<sup>131</sup> Table 3 shows the number of children to whom a guardian ad litem was appointed by the Office for Labour, Social Affairs and Family.

131 See: Ústredie práce, sociálnych vecí a rodiny SR. 2012. Interná norma č. IN – 014/2012 Vykonávanie funkcie kolízneho opatrovníka a súvisiacich opatrení sociálnoprávnej ochrany detí a sociálnej kurately úradmi práce, sociálnych vecí a rodiny.

**Table 3. Appointment of SLPCaSG as a guardian ad litem (number of children)**

Cases	Year							
	2004	2005	2006	2007	2008	2009	2010	2011
Number of children	46553	52001	53159	55953	57300	59745	54169	52366
Children/ 1 SW	114,26	124,94	122,71	139,98	143,96	147,51	135,08	142,29
Cases	Year							
	2012	2013	2014	2015	2016	2017	2018	2019
Number of children	48782	46634	35769	52354	54920	58066	61263	64448
Children/ 1 SW	124,12	112,91	87,24	125,54	131,38	116,83	104,54	99,76

Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic) 12-01 for the 2004-2019 period

The number of cases in which the office was appointed guardian ad litem, showed fluctuating development with a significant decline in 2014 (35,769 children). The number of cases increased from 2015, from 52,354 to 64,448 children in 2019.

When representing the child in matters of rights and duties towards a minor child, the guardian ad litem must take into consideration the child's background, the environment in which the child currently lives, the relations between the parents and the child and relations between the parents themselves and must also take into consideration how the child will live after the child is entrusted into the personal custody of one of the parents or into the joint custody of both parents. When representing the rights of the child, the guardian ad litem must always endeavour to ensure that the child subsequently lives in the best possible conditions<sup>132</sup> and should not be biased towards either parent.

#### **Establishing the child's opinion and the child's best interests**

The social worker must also make sure that the child's best interests are observed during his work. This condition arises from an important document titled the Convention on the Rights of a Child.

The UN Committee on the Rights of the Child issued General Comment No. 14 on the right of the child to have his or her best interests taken into primary consideration in 2013. It is the duty of the state to implement all necessary and specific measures for full execution of this right. The Committee considers this general comment the framework for assessment and determination of the child's best interests. Mátejová<sup>133</sup> states that, during assessment of the child's best interests, all institutions should take into consideration particularly the circumstances that are related to the individual characteristics of the affected child.

According to Trampotová and Lacinová, the child is part of a dispute between the parents during regulation of rights and duties, during which time the child is not simply an observer of this dispute, but may also be actively involved in the conflict by expressing its opinion.<sup>134</sup> If the

132 See: Ústredie práce, sociálnych vecí a rodiny SR. Interná norma č. IN – 039/2018 – Vykonávanie funkcie kolízneho opatrovníka a súvisiacich opatrení sociálnoprávnej ochrany detí a sociálnej kurately úradmi práce, sociálnych vecí a rodiny. Metodický pokyn č. 4 – 6/2018. (Bratislava, 2018) 4-6.

133 See: A. Mátejová, *Limity ochrany práv dieťaťa v procese rozvodu rodičov s medzinárodným prvkom. In Dieťa v ohrození pod názvom Limity ochrany práv detí rozvádajúcich sa a rozvedených rodičov.* (Bratislava: Výskumný ústav detskej psychológie a patopsychológie. 2017), 44.

134 See: O. Trampotová and L. Lacinová Vtahování detí do konfliktu mezi rodiči: porovnání a kritické uhodnocení

child's age and reasoning ability allows this, the child is entitled to express an opinion in regard to regulation of the rights and duties of the parents towards a minor child. Its standpoint will be included in the written report by the guardian ad litem, which is submitted to the court as evidence. In most cases the child's opinion is established by the guardian ad litem, but sometimes the child may also be heard by the court itself. Milojevich et al. are of the opinion that the child's age and maturity must be taken into consideration when it is questioned and an informal environment that eliminates any stress to the child must be created.<sup>135</sup>

One option use form an objective image of the family in which the child is growing up is establishment of the child's opinion, which the social worker may also carry out on the basis of his own decision, or on the basis of a request by a court of law, or other impulse. In relation to this action, it is essential to consider what to ask the child and how. As Šmíd and Šínová state,<sup>136</sup> which parent the child would rather live with after the divorce is a very sensitive question for the child, and should only be asked in exceptional situations.

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současných koncepcí, *Československá psychologie* 59, no. 1 (2015): 57-70; see: Mičková, K. Selected Projects Aimed at Supporting Families Affected by Poverty. In *Theology and social sciences from interdisciplinary perspective*. (Krakow: Wydawnictwo Avalon, 2020), 156-184.

135 See: H. M. Milojevich, et al., Children's Participation in Legal Proceedings: Stress, Coping and Consequences. in: *Advances in Psychology and Law: Volume 1*. (Springer International Publishing Switzerland: 2016): 185-216. edited by Miller, M. K., Bornstein, B. H.

136 See: O. Šmíd and R. Šínová. *Rozvod manželství*. (Praha: Leges, 2013), 232.

**Table 4. Establishing the child's opinion**

Incidents - establishment	Year							
	2004	2005	2006	2007	2008	2009	2010	2011
At the request of a court of law	x	x	x	8890	9358	10724	9 166	10 795
Own decision	x	x	x	12147	14425	13847	14 865	14 735
Another impulse	x	x	x	2251	2975	4518	5 229	5 226
Jointly	x	x	x	23288	26758	29089	29260	30756
per 1 SW / SLPC	x	x	x	58,26	67,23	71,82	72,96	83,57
<b>Incidents – children</b>								
At the request of a court of law	x	x	x	7618	7808	9174	7 523	9 065
Own decision	x	x	x	9483	11875	11369	11 648	11 806
Another impulse	x	x	x	1809	2508	3433	3 807	3 550
Jointly	x	x	x	18910	22191	23976	22978	24421
Establishment / 1 child	x	x	x	1,23	1,20	1,21	1,27	1,26
Incidents - establishment	Year							
	2012	2013	2014	2015	2016	2017	2018	2019
At the request of a court of law	12 547	6 885	3 156	1 887	744	1 305	2646	3025
Own decision	25 560	23 133	19 600	18 216	18 117	18 034	19155	23585
Another impulse	7 120	4 678	1 705	1 459	2 373	2 284	1409	1138
Jointly	45227	34696	24461	21562	21234	21623	23210	27748
per 1 SW / SLPC	115,08	84,00	59,66	51,70	50,79	43,50	39,60	42,95
<b>Incidents – children</b>								
At the request of a court of law	10 842	5 927	2 765	1 624	657	1 231	2416	2737
Own decision	21 307	16 288	12 700	11 526	11 684	12 012	13122	15847
Another impulse	5 038	2 883	1 494	1 215	1 908	2 041	1120	940
Jointly	37187	25098	16959	14365	14249	15284	16658	19524
Establishment / 1 child	1,21	1,38	1,44	1,50	1,49	1,41	1,39	1,42

**Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic)12-01 for the 2004-2019 period**

We register information about establishment of the child's opinion in statistical reports from 2007. During the monitored period we registered fluctuating development of the number of incidents of establishment and also the number of children whose opinion was established. Social workers most often establish the child's opinion on the basis of their own decision.

The number of incidents in which the child's opinion was established on the basis of a decision by the social worker was significantly higher than the number of incidents on the basis

of a request by a court of law. The highest number of incidents of establishment occurred in 2012 (25,560 incidents of establishment of a child's opinion) and the lowest number occurred in 2007 (12,147 incidents of establishment of a child's opinion) The highest number of incidents of establishment of a child's opinion on the basis of a request by a court of law also occurred in 2007 (12,547) and the lowest occurred in 2016 (744). Social workers can also establish a child's opinion on the basis of a suggestion from another body (not a court of law). This indicator reached its maximum in 2012 – 7,120 cases of establishment of a child's opinion, and its minimum in 2019 – 1,138 cases.

On the basis of investigations in the natural environment of the client, investigations in institutions and also on the basis of the child's opinion, social workers of the SLPCaSG Department submit a report based on objective facts to the court with jurisdiction, which issues a ruling in matters of the upbringing and maintenance of a child, and also other reports for other government bodies. Development of the number of submitted reports, which are considered important evidential material, is given in Table 5.

**Table 5. Reports submitted in matters of the upbringing and maintenance to a court and other government body**

	Year							
Cases	2004	2005	2006	2007	2008	2009	2010	2011
Reports	54231	56201	60942	63381	61258	56126	53455	57492
Reports/ 1 SW	133,11	135,03	140,67	158,57	153,91	138,58	133,30	156,22
	Year							
Cases	2012	2013	2014	2015	2016	2017	2018	2019
Reports	54878	38045	23881	19802	22966	22871	24227	25532
Reports/ 1 SW	139,63	92,11	58,24	47,48	54,94	46,01	41,34	39,52

**Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic) 12-01 for the 2004-2019 period**

The established data shows a significant decline in the number of written reports on upbringing and maintenance, from 54,231 reports in 2004 to 25,532 reports in 2019. The number of reports submitted by one social worker fell in proportion to this – from 133.11 (2004) to 39.52 (2019). When making decisions in matters of upbringing and maintenance, the relevant SLPCaSG Department appointed as guardian ad litem and is also a party to court hearings.

According to the principle of verballity, the guardian ad litem is entitled to express an opinion of matters that it established by investigation of the child's situation and also of circumstances in regard to which the child expressed an opinion, verbally before the court.<sup>137</sup> Development of the number of incidents of the participation of a guardian ad litem at court hearings in matters of regulation of rights and duties towards children is shown in Table 6.

<sup>137</sup> See: J. Andrušová and J. Laľová, *Manuál činnosti sociálnych pracovníkov k problematike sociálnoprávnej ochrany detí a sociálnej kurately* (Bratislava: SAP Slovak Academic Press, s.r.o., 2009), 26.

**Table 6. Court hearings in matters of regulation of the parents' rights and duties towards children**

	Year							
Incidents	2004	2005	2006	2007	2008	2009	2010	2011
Hearings	67267	68347	69384	65711	67784	71861	66982	66217
Hearings / 1 SW	165,11	164,21	160,16	164,40	170,31	177,43	167,03	179,93
	Year							
Incidents	2012	2013	2014	2015	2016	2017	2018	2019
Hearings	59441	40967	28451	23624	22016	21797	21798	21249
Hearings / 1 SW	151,24	99,19	69,39	56,65	52,66	43,85	37,19	32,89

**Source: Own work according to module V (Ministry of Labour, Social Affairs and Family of the Slovak Republic)12-01 for the 2004-2019 period**

We can observe a decline in the number of court hearings at which a social worker in the function of guardian ad litem was present. At the beginning of the observed period, in 2004, social workers participated in 67,267 hearings, but, in 2019, this number was only 21,249. The number of hearings per social worker also fell, from 165.11 hearings (2004) to 32.89 hearings (2019).

**Conclusion**

Protection of children, as a vulnerable group, is an important matter for modern society. The Slovak Republic also assures social-legal protection of children with the goal of respecting the child's best interests.

A univariate analysis of secondary data on intervention by social workers from the Office for Labour, Social Affairs and Family, Social-Legal Protection of Children and Social Guardianship Department for the period from 2004 to 2019, pointed out a number of circumstances. There was a significant increase in the number of workers of the Social-Legal Protection of Children and Social Guardianship Department during the monitored period, which had an influence on the decline in the number of actions per social-legal protection worker.

Social workers executed a total of 272,630 petitions during the 2004-2019 period, an annual average of 17,039 petitions. During the monitored period the Office for Labour, Social Affairs and Family was appointed guardian ad litem to 853,482 children, an average of 53,343 children per year. From the aspect of the number of children per 1 SLPC social worker, this was an average of 123 children per calendar year during the entire monitored period, during which time this number gradually fell, which is also related to the increase in the number of workers. Despite this trend, the number of children to whom the Office was appointed guardian ad litem was nearly 100 per social worker in the last monitored year.

Despite the fact that there was a significant decline in petitions executed by OLSAaF social workers (7.22 x reduction) and also a decline in the number of executed petitions per social-legal protection of children worker (11.45 x reduction), the OLSAaF was appointed guardian ad litem for children more often in 2019 than in 2004 (an increase by 38.44%).

During the monitored period, from 2007 to 2019, the when this indicator was established within the terms of statement V 12-01, social workers carried out a total of 358,912 incidents of establishment of a child's opinion, with an average 27,609 incidents per year. The total lowest number of incidents of establishment occurred in 2016 (21,234) and the highest in 2012

(45,227). Incidents of establishment of the child's opinion had a rising tendency during the monitored period and culminated in 2012 (45,227 incidents of establishment of a child's opinion). The number of incidents of establishment per SLPC social worker shows similar development and achieved its maximum in 2012 (115 incidents of establishment).

Social workers submitted a total of 695,288 reports to courts of law and other government bodies in matters of upbringing and maintenance during the monitored period, the annual average was 43,456 reports, and participated in 782,896 court hearings, with an average of 48,931 court hearings per year.

Even though the analysed indicators of intervention by social workers show a decline in absolute numbers, it is essential to state that social work, particularly in relation to the social-legal protection of children, cannot be assessed using quantitative indicators alone, because each child and each action carried out by a social worker requires professionalism, competence and thorough adherence to the principle of the child's best interests. It is also essential to take into consideration the complexity of the case and actions carried out within its terms. The healthy psychohygiene of guardians of children and their further education also affects the efficiency of work, the quality of actions, decisions, procedures and professional statements and also the perspective of decisions. This seems an essential requirement in the portfolio of services. Consultancy and legal activities, as well as further education of guardians in Slovakia, is completely absent. The Act on Social Services imposes the obligation of further education, supervisory meetings to provide support, development and protection against burn-out on employers and employees. However, employees of Labour Offices fall under this act as a result of the social work and social services they carry out for the target group. They are however dealt with within the terms of the government administration under which they are categorised and this causes problems with application of the Law on Social Services. This is why it seems necessary to explicitly formulate this requirement in the Act on Civil Services and the catalogue of work activities.

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## DIGITAL CONTENT AND THE IMPACT OF VERBAL COMMONALITY ON DIFFERENT JURISPRUDENTIAL RULINGS - AN APPLIED STUDY



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### Abstract

**Background:** This study aimed to find out the impact of Islamic digital content on the Internet. Knowledge is considered the basic issue and intellectual ideology of societies that aspire to develop to become in the ranks of scientifically and cognitively advanced societies as knowledge and modern technology are complementary to each other and each of them is considered an entrance and a measure of the development of societies in our present time.

**Methods:** This research followed the comparative analytical inductive approach, which is based on tracking what is related to the verbal participant in the books of linguists and fundamentalists as well as jurists, and analyzing and comparing it with others, while tracing the jurisprudential implications that resulted from it.

**Results:** Among the most important findings of the research: that the verbal commonality is a sign of the development of the Arabic language, and it is permissible to ever occur in speech in the Qur'an and the Sunnah, and others.

**Conclusion:** Because usage is evidence of participation, and whether the verbal participant is less or more, and because of its presence in some of the legal texts, because of it the difference between the jurists has occurred. The research reached important results that are listed.

**Keywords:** Digital Environment – The Internet – Virtual Knowledge – Verbal Common –Jurisprudential Rulings.

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### Introduction

Today, the world has become a village due to seven technological advances, the information and communication revolution, and the overlapping of different societies and cultures. More precisely, it can be said that the world went into living rooms in which the public and the private were intertwined, and the information became available in every way, and its types, which led to a steady increase in data and information, which created chaos in the circulation of the information and the difficulty of repeating the extent of the validity and stability of the support in order to create new papyri in the space of knowledge to verify its authenticity is particularly true with regard to Islamic religious digital information<sup>139</sup>.

The information seeker is no longer a researcher in the local community only, but he has become a researcher in an international community, and he is living in a rapidly evolving era looking for skills and information to help him live in the age of information.

Today, the circuit is the basis of strength for societies and the basis for their success and progress. And there became in the so-called pro-social societies what is called the society of profiteering, which is required by the production of the craft which is considered the most important factor in production and surpasses the head of the signifier and the effort that goes into the work, which aims to create environments that are suitable and build knowledge and matters that are delayed. And the application of individual intelligence and dealing with the problems of independent or individual learning, and the encouragement of effective participation in education and learning. And it depends on linking information, its information, its criticism and its synthesis again, so that information becomes knowledge that can be used in solving the individual's life problems, building relationships with others, communicating with it, developing creativity and innovation<sup>140</sup>.

Verbal participation in the legal texts is one of the topics that were taken care of by scholars of Sharia and linguists alike, but this research did not receive full attention, and careful research with regard to the applied aspect of it, and the explanation of the benefits in jurisprudence, and the one who is familiar with the chapter in the books of origins finds The fundamentalists mention the verbal joint from its sections, but they repeat repeated examples such as: Al-Qurra and Asas, without explaining the jurisprudential impact of this verbal sharing, which calls for a thorough study of the common examples, and an explanation of the jurisprudential impact resulting from them<sup>141</sup>. The importance of this topic is due to the fact that it has a relationship with multiple sciences, for it has a relationship with some chapters of origins, such as the general and general, and it has a relationship to books of verses of rulings, books of jurisprudence, books of similarities and analogues, and it is also about the sciences of the Arabic language, so writing in it allows access to all these arts.

139 Syarilla Iryani A. Saany, Elsayed M. S. S. Elawadi, Yasser M. Tarshany, M. Hafiz Yusoff, Yousef A. Baker El-Ebiary, Nur Hikmah Binti Ismail. (2020). Utilizing the AR and Mobile Apps to Show the Rhetorical Miracle of the Fetal Growth Stages According Quran. IJFGCN, 13(3), 1068–1081.

140 Yousef A. Baker El-Ebiary, Elsayed M. S. S. Elawadi, M. Hafiz Yusoff, Syarilla Iryani A. Saany, Yasser M. Tarshany, N. Jannah Binti Abdullah. (2020). Mobile Application Utilizing 2D Animation to Learn Animals Stories in Quran in Multi Languages. IJFGCN, 13(3), 1082–1091.

141 1- Ibn al-Atheer, Majd al-Din Abu al-Sa'adat al-Mubarak bin Muhammad bin Muhammad bin Muhammad ibn Abd al-Karim al-Shaybani al-Jazari (deceased: 606 AH), the end in Gharib al-Hadith and al-Athar, i: The Scientific Library - Beirut, 1399 AH - 1979 CE, edited by: Taher Ahmad al-Zawy - Mahmoud Mohammed Al-Tanahi.

Verbal participation, which is: “the subject term for two or more meanings”<sup>142</sup>, and in summary: what bears two or more meanings alike, singular or compound<sup>143</sup>, and common names: names assigned to two or more different meanings alike<sup>144</sup>.

The scholar Al-Ragheb Al-Safhani mentioned, “It is known that a word with meaning has five states”<sup>145</sup>, including: that they agree on the wording and differ in the meaning, and this type is called the joint, as it is called the agreed upon. Most linguists have proven the phenomenon of sharing the Arabic language. Because it does not make sense to deny it, with what has been mentioned of many examples, which are not addressed by suspicion. Ibn Faris said about it: “That the word is possible for two or more persons”<sup>146</sup>. It is permissible for the word to occur, either from two formulas, that one of them puts a term for a meaning, then the other puts it for another meaning ..., or from one who puts it ..., and among the linguists who must have it occurring. Because “the meanings are infinite and the terms are infinite, so if they are distributed, it is necessary to participate”<sup>147</sup>.

Some linguists believe that this phenomenon is most likely, explaining that the letters are all common, and past verbs are common between preaching and supplication, and the present tense is common between adverbs and receptions, and the nouns in which this phenomenon appeared a lot, and because of all this, the participation is most, yet they decided that this phenomenon is a „disagreement.“ The original „<sup>148</sup>.

#### **Digital Content and Management Systems**

A digital content is a social network of a group of individuals who interact with each other using some method of communication, bypassing all geographical and political barriers in pursuit of common interests and goals.

Virtual societies have received a lot of research attention in the West, but their treatment in the Arab world remains hostage to translation from Western thought, so the terms remain strange, repellent and unpalatable, for example, digital, digitalization and cybertheory. The the-

142 2- Ahmad bin Faris, bin Zakaria al-Qazwini al-Razi, Abu al-Husayn, (deceased: 395 AH), al-Sahbi on the jurisprudence of the Arabic language and its issues and the Sunnah of the Arabs in its speech, first edition, 1418 AH-1997AD.

143 3- Al-Bahsin Al-Tamimi, Yaqoub bin Abd Al-Wahhab bin Youssef, Al-Takhreej among the jurists and fundamentalists (a study of an applied and original theory), I Library of Rushd, 1414 AH.

144 4- Al-Tahanawi, Muhammad bin Ali Ibn al-Qadi Muhammad Hamid bin Muhammad Saber al-Faruqi al-Hanafi (deceased: after 1158 AH), Encyclopedia of Scouts of Art and Science Terminology, presented, supervised and revised by: Dr. Rafiq Al-Ajam, investigation by: Dr. Ali Dahrouj, translating the Persian text into Arabic: Dr. Abdullah Al-Khalidi, foreign translation: Dr. George Zinani, Publisher: Lebanon Library Publishers - Beirut, Edition: The First - 1996.

145 5- Al-Juwaini, The End of the Muttalib in the Derayat al-Madhab, Abd al-Malik bin Abdullah bin Yusuf bin Muhammad, Abu al-Maali, Rukn al-Din, nicknamed Imam of the Two Holy Sanctuaries (deceased: 478 AH), U: A. Dr. Abdul Azim Mahmoud Al-Deeb, ed.: Dar Al-Minhaj, 1st Edition, 1428 AH-2007 AD.

146 6- Hafez Thana Allah Al-Zahidi, Summarizing the Principles, i: Manuscripts, Heritage and Documentation Center - Kuwait, 1st Edition, 1414 AH - 1994 AD.

147 7- Al-Hefnawi, Hamad Ibrahim, Fundamental Studies in the Holy Qur'an, Al-Issa Art Library and Printing Press - Cairo.

148 8- Al-Ragheb Al-Isfahani, Abu Al-Qasim Al-Hussein Bin Muhammad, (deceased: 502 A.H.), Interpretation of Al-Ragheb Al-Asfahani, investigation and study: Dr. Muhammad Abdel Aziz Bassiouni, Faculty of Arts - Tanta University, 1st floor, 1420 AH - 1999 AD.

oretical frameworks remain capable of comprehending the vocabulary of Arab-Islamic culture. Systems dealing with digital content can be included under the following categories<sup>149</sup>:

2.1 Enterprise Content Management System ECM: It is the systems responsible for managing documents, records, multimedia files, processes and transactions at the level of institutions, companies and agencies. These systems are concerned with the standards by which information is created, circulated, modified, maintained, and published during the production process carried out by the establishment and related mainly to the primary purpose of its existence so as to ensure its confidentiality and availability to the decision-maker and workers when needed and its compatibility with the laws and obligations that the establishment has. In its field of operation. This type of system is often concerned with large establishments such as banks, insurance companies, government institutions, hospitals, pharmaceutical companies, energy companies, and contracting companies. It is also important for small and medium companies and even individuals as services such as Box and Dropbox offer this type of benefits as well. According to the latest Gartner report for the year 2015, the content management systems market is led by IBM, OpenText, Microsoft, Lexmark, ORACLE, EMC, Hyland, in addition to other companies that have influence in this market such as Alfresco, M-Files, Xerox, EverTeam and others. Recently, these systems have tended to serve certain sectors of the market after they were multi-purpose and general to all, making them only targeted by specific customers.

2.2 Web Content Management System WCMS / CMS: It is the systems responsible for creating, maintaining and publishing content for websites and digital media in general, and it is essential today for any company or facility that owns a website where it is difficult to manage a site and publish information on it without that Systems. Statistics indicate that only about 50% of websites operate on content management systems. The WordPress open source content management system controls about 50% of those sites, equivalent to a quarter of the websites as a whole. According to Gartner's latest report for the year 2015, the companies leading this market in commercial terms are SiteCore, Adobe, IBM, HP, Oracle, Acquia, in addition to other companies affecting the market, mostly for open source applications such as WordPress, EZ System, Extron and other commercial applications as well as OpenText, SDL, Microsoft.

2.3 Learning Content Management System LCMS / LMS: It is the systems concerned with disseminating content related to electronic courses according to certain standards that ensure the sequencing of educational content and the training and exams that may accompany it. These systems enable the teacher to prepare and publish the content of his e-course to be accessed and interacted with by students registered in the system. This marketplace is led by blackboard, Moodle (open source) and Desire2Learn apps. Many specialists are calling for the abandonment of traditional electronic learning systems in favor of more open systems, such as content management systems without restrictions, as they are restrictive systems and most of them have not developed to accommodate today's generation.

2.4 Portals: These systems mainly work to bring different types of content and services to the user from various sources for one place only, which is the internal or external electronic portal of the facility. These systems are characterized by their high ability to integrate with other systems to fetch information from them and present them to the user, as well as the ability to manage

149 Elsayed Mohamed Salem Elawadi, Zulazhan Ab. Halim, Najeeb Abbas Al-Sammarraie, Yousef Abubaker El-Ebiary, Bishwajeet Pandey, (2019). „The Impact of E-Learning in Teaching Arabic Language for Non-Native Speakers“, (IJRTE), Volume-8 Issue-253, pp. 1159-1162.

a large number of users and provide appropriate information to each user according to his file and his powers on each of those systems. Hence, these systems are directed more towards large companies and websites. According to Gartner's latest report for the year 2015, this market is being led by IBM and the Liferay app (open source), which are widely used in e-governments as well as Oracle, Microsoft, and SAP used in large and medium enterprises. Also, open source portal systems have a good share in this market, especially for WordPress, Dropal, DNN, Jahia, and Red Hat applications, which vary in the technologies they use between PHP, Dot Net, and JAVA.

The functions performed by these three types of systems are so intertwined that you may even find one application that performs them all, such as SharePoint from Microsoft, WebCenter from ORACLE, in addition to SiteCore and OpenText, depending on the customer's need to own the application.

**Verbal Joint, When Linguists and Fundamentalists**

The common expression is defined as: the single word that is assigned to two or more two parties, and it was said: It is "what is united in its image and its meaning differs", and it was said: "The fact that the singular expression is the subject of both meanings as a substitution without preference." Among the common expressions is the letter ('Aen), as it is called the sight of the eye, and it is called the running eye. The Almighty said: There is a running ('Aen) in it. And the spy is called, and it is said: The enemy sent in Medina his ('Aen), meaning: his spies. It is used to mean gold and silver<sup>150</sup>.

Ibn Faris said, indicating the types of wording in terms of agreement and separation: "This is in terms of: .... and from it the many things are called by one name." The agreement of the word and the difference of meaning, such as our saying: the eye of water, the eye of money, the eye of clouds, and this is the common verbal. He ruled in the sense: to decree, and ruled in the meaning: to command, and judged in the meaning: to know, and to decree in the meaning: to void, and if the wording differs, then the original is one and from it. Genders, including the verbal commonality, this type that has spread in the language books and the scholars have taken care of it<sup>151</sup>. Al-Suyuti has its meaning among the people of origins as "the one word that denotes two different meanings or more, indicating both among the people of that language, then he explained the opinion of some scholars about it, where he said: and differed The people in it, the majority of them, as it is possible to fall; It is permissible for it to occur either from two signifiers, one of them assigning a pronunciation to a meaning, then the other assigning it to another meaning, and that expression is popular between the two sects in his testimony of the two, or from a single one for the purpose of the thumb on the listener. Where the permit is the cause of the spoilage; It was also narrated on the authority of Abu Bakr Al-Siddiq - may God be pleased with him - and a man asked him about the Prophet --When they went to the cave, from this he said: This will guide me to the path. Al-Suyuti mentioned that the majority of people are as real, because the people of the language say that in many terms, and among the people who „necessitated its occurrence; Because the meanings are infinite, and the terms are infinite; If it is distributed, it is necessary to share. Then he explained the differences in the sayings of the

150 9- Al-Rafi'i, Abd al-Karim bin Muhammad bin Abd al-Karim, Abu al-Qasim al-Qazwini (deceased: 623 AH), al-Aziz Sharh al-Wajeez, known for his great explanation, edited by: Ali Muhammad Awad - Adel Ahmad Abd al-Mawjid, i: Dar al-Kutub al-Ilmiyya, Beirut - Lebanon, i1 1417-1997AD.

151 10- Al-Zarkashi, Abu Abdullah Badr al-Din Muhammad bin Abdullah bin Bahadur Al-Zarkashi, Al-Bahr Al-Muheet in Usul Al-Fiqh, Dar Al-Kutbi, ed / 1, 1414 AH - 1994 AD.

scholars on this issue, saying: Some of them went to the majority, because the letters are common, and the past verbs are common between the news and the supplication, and the present tense as well. In the two sections of letters and verbs, participation was most, and it was stated that most of the expressions are nouns, and there is little participation in them by induction, and there is no dispute that participation is contrary to the original, and then he mentioned multiple examples from books for this type of speech<sup>152</sup>.

Usool scholars have examined verbal participation in terms of its definition, its occurrence or non-occurrence, its reasons, and its being one of the reasons for the disagreement of the mujtahids, and the common origin is common in it, because the formula is shared in it, which is: the word placed for two different facts or more is first placed in terms of which they are different. Al-Shawkani knew him, so he said: The word used for two or more different facts. And it came in the previous two definitions, "the word placed for two different facts," meaning that what is meant is that the term is used for two different facts, so it is not common for the term to be given to one of the meanings as a fact, and for the other meaning as a metaphor<sup>153</sup>.

The scholars of assets differed in the occurrence and non-occurrence of the participant, and some of them believe that it does not happen. Because the terms are only used to define the meanings and understand them, and if the word has been assigned to two meanings or several meanings, the meaning of them or them is rarely understood if there is no presumption, in addition to the fact that the participation results in a vagueness as long as it is not indicated. Judge Casablanca chose that it is possible and realistic<sup>154</sup>. Ibn al-Hajib said: It is permissible and true among the investigators, and the most correct is that it came in the Holy Qur'an as narrated by Ibn al-Hajib. Although it is permissible and located in the Arabic language, it is „contrary to the original“, meaning that if the matter is between participation and non-participation, then most likely it is not taken into account, because participation leads to a breach of understanding for the addressee. It may be difficult for the listener to inquire, either because of his shyness, or the prestige of the speaker, or for any other reason, and he may make him fall into ignorance, until it was said: The participant is a greater cause in the occurrence of mistakes. Among the aspects in which he also inferred that sharing is contrary to the original, induction indicates that the common words are less than the single words<sup>155</sup>.

Among the examples of the participant in the books of assets are: the pronouncement of an eye, and the word: recitation for menstruation and purity, and evening nights, meaning: come and turn, and from it in the Noble Qur'an it has been ruled in the sense of: decree, as the Almighty says: Then the one over which the time has been spent (Surat al-Zumar: 42), Meaning: command in the Almighty saying: "And your Lord has decreed that you should worship only Him." (Al-Israa:

152 11- Al-Suyuti, Abd al-Rahman ibn Abi Bakr, Jalal al-Din (deceased: 911 AH) is authentic and weak in al-Jami ,al-Sagheer and its increase.

153 12- Al-Suyuti Jalal al-Din, Abd al-Rahman bin Abi Bakr bin Muhammad bin Sabiq al-Din al-Khudairi al-Suyuti, al-Muzhar in the sciences of language and its types, edited by: Muhammad Jad al-Mawla - Muhammad Abu al-Fadl Ibrahim - Ali Muhammad al-Bajawi, i: Modern Library, illustrated on the edition of Issa al-Babi Halabi.

154 13- Shams al-Din al-Isfahani, Mahmoud ibn Abd al-Rahman, Bayan al-Mukhtasar, Explanation of Mukhtasar Ibn al-Hajib, T / Dar al-Madani, Saudi Arabia, ed / 1, 1406 AH / 1986 CE.

155 14- Al-Shawkani, Muhammad bin Ali bin Muhammad bin Abdullah Al-Shawkani of Yemen, Guiding the Stalions to Realize the Truth from the Science of Usul, investigation by: Sheikh Ahmad Ezzo Enaya, Damascus - Kafr Batna, presented to him by: Sheikh Khalil Al-Mayes and Dr. Wali Al-Din Salih Farfour, i: Arab Book House, i / 1, 1419 AH - 1999 CE.

23). The Almighty said: “Redeem what you are a judge” (Surah Taha: 72). And some fundamentalists mentioned that the common name is like the recitation of the purification and menstruation, and it is actually like a lassa, and a letter K from the neighbor that is to start and to spend<sup>156</sup>.

### Reasons for Verbal Participation

Among the most important reasons that lead to the emergence of the verbal joint among linguists:

4.1 Metaphorical usage: Modern linguists have unanimously agreed that sensory meanings are earlier in existence, and more deserving to be considered true meanings and other branches of it through metaphor, and accordingly the multiple meanings of the word were related in the minds of the first Arabs to the sensual meaning, and with the passage of time this relationship was hidden. For example: when the eye that was originally placed for the organ of vision in man points to the cloud, or to rain of days that does not stop, to the last of those meanings, the relationship between it and the original meaning is not clear, then the relationship was present in the minds of the early adopters<sup>157</sup>.

4.2 The overlap of dialects: This is as if the word puts one of the meanings “Arab neighborhood,” and another living meaning, and each group knows about the position of the other, and the two uses are common. Then the different meanings of the same word combined in the language and the participation emerged<sup>158</sup>.

4.3 The overlap of languages: for example, if the Arabic language borrows a term that resembles an Arabic word. But it has a different connotation. For example, love indicates affection and love, as well as the huge jar in which water is: But the word in its second meaning is Persian Arabized<sup>159</sup>.

4.4 Phonological development: such as if some of the phonemic sounds are changed, deleted, or added to some of them. It agrees in its form with another term that differs from it in meaning; Participation arises, such as: support when it indicates strength and appeal; The second meaning is for flesh with bark. But H has turned to Al-Ain because of its proximity to the invisible sign, and the lack of support in the sense of power. Verbal sharing arose in this word<sup>160</sup>.

156 15- Subhi Ibrahim Al-Saleh (died: 1407 AH), Studies in Philology, House of Knowledge for Millions, First Edition, 1379 AH - 1960 CE.

157 16- Al-San'ani, Muhammad bin Ismail bin Salah bin Muhammad al-Hasani, Al-Kahlani, then, Abu Ibrahim, Izz al-Din, known as his predecessors, deceased: 1182 AH, Subul al-Salam, I: Mustafa al-Babi al-Halabi library, 4th ed.

158 17- Al-Taher Bin Ashour Al-Tunisi, Al-Tahrir and Enlightenment, “Liberating the Good Meaning and Enlightening the New Mind from the Interpretation of the Glorious Book”, I: Tunisian Publishing House - Tunisia, Publication year: 1984 AH.

159 18- Al-Tibi, Sharaf al-Din al-Husayn bin Abdullah, Sharh al-Tibi on the lamp of al-Misbah, ed.: Nizar Riyadh Library), 1st Edition, 1417 AH - 1997 AD.

160 19- Abd al-Karim bin Muhammad al-Lahim, who is familiar with the minutes of Zad Al-Mustaqni, “The Jurisprudence of the Family”, ed.: The Treasures House of Seville for Publishing and Distribution, Riyadh, 1st Edition, 1431 AH - 2010 AD.

4.5 The morphological symptoms: for example, the morphological rules lead to the agreement of two close words in one form. This results in a multiplicity of meaning. So the word sunset is a source of the setting of the sun, and it may be the plural of west, meaning the great Aquarius<sup>161</sup>.

4.6 The difference in the situation between the Arab tribes. That one tribe assigns the word a meaning, and another tribe assigns it to another meaning, then the term is used in the two meanings without a text on different subjunctive ones. The word is put to a real meaning, then it is used in another metaphorical meaning for a relationship between the two meanings: the real and the metaphor. In the metaphorical sense, and with the length of time the permissibility is forgotten, and thus the release becomes a customary reality in it, and the word is transferred to the children of the Arabic tongue as a fact in both meanings<sup>162</sup>.

That the term has a common meaning between two or more meanings due to the presence of an inclusive meaning between them. With the succession of time, the overall meaning is forgotten, and the word becomes a common verbal.

### The Effect of Verbal Participation in The Different Jurists

Sharing the pronunciation is one of the reasons for disagreement among scholars. Because if the legal text includes a common word, it is often necessary to differ in defining what is meant by this word (Surat Al-Baqarah: 228). The word (Qurou') in Arabic carries more than one meaning, so it is possible to mean menstruation, just as it is possible to mean purity, just as it bears the will of those concerned together ... The purity of menstruation with menstruation as a recitation. And since this legal term is possible, therefore the jurists differed as to what is meant by it, so Imam Al-Qurtubi said in his interpretation of this verse: “The scholars differed about the recitation, so the people of Kufa said: It is menstruation, and it is the saying of Omar, Ali, Ibn Masoud, Mujahid, Qatada, Al-Dahhak and Ikrimah ... And the people of the Hijaz said: They are the pure ones. This is the saying of Aisha, Ibn Umar, Zaid bin Thabit, Al-Zuhri, Aban Ibn Uthman and Al-Shafi'i, and from that also the word (Taher), in the hadith of Abdullah bin Omar, that the Messenger of God - may God bless him and grant him peace said: The Qur'an only touches the one who is pure<sup>163</sup>. Out of context. As is the possibility and participation in the articulation, it is in the manner and composition, and that is the saying of the Prophet - may blessings and peace be upon him - in the hadith: “The slaughter of the fetus is the slaughter of its mother.” For the second word zakat is narrated by raising and accusative, so whoever takes the narration of the revelation makes it news for the beginner who is the slaughter of the fetus, so that “the slaughter of the mother for him is the slaughter of the fetus,” and the fetus does not need an appellant slaughter<sup>164</sup>. And whoever chooses to narrate the accusative narration of the first and second dhikr, the meaning

161 20- Alaa Al-Din Al-Bukhari, Abdul Aziz bin Ahmed bin Muhammad, Al-Hanafi, (deceased: 730 AH), Kashf Al-Asrar Explanation of the Origins of Al-Bazdawi, Dar Al-Kitab Al-Islami, without edition and without date.

162 21- Al-Ayni, Abu Muhammad Mahmoud bin Ahmed bin Musa bin Ahmed bin Hussein Al-Gheitabi Al-Hanafi Badr Al-Din (died: 855 AH), Sharh Al-Hidaya Building, T: Dar Al-Kutub Al-Ilmiyya - Beirut, Lebanon, 1st edition, 1420 AH - 2000 AD.

163 22- Fakhr al-Din al-Razi, Abu Abdullah Muhammad bin Omar bin al-Hasan bin al-Husayn al-Taymi al-Razi, nicknamed Khatib al-Ray, (deceased: 606 AH), Keys to the Unseen = The Great Interpretation, House of Revival of Arab Heritage - Beirut, Edition: the third - 1420 AH.

164 23- Fakhr al-Din al-Razi, Abu Abdullah Muhammad bin Omar bin al-Hasan bin al-Husayn al-Taymi al-Razi, (deceased: 606 AH), results, study and investigation: Dr. Taha Jaber Fayyad al-Alwani, ed: Foundation for the message, 3rd edition, 1418 AH - 1997 AD.

for him is: the slaughter of the fetus is the slaughter of his mother, so the owners of the second opinion agree on the issue.

### **Application Forms for The Verbal Participant**

Applied examples of the different mujtahids, as a result of their difference in defining what is meant by the common wording in legislative texts are many, including:

The first example: The Almighty's saying: "The divorced women lie in wait for themselves for three reciters" (Surat Al-Baqarah: 228). The days of her readers (i.e., the days of her menstruation), and whoever comes to it with the meaning of purity, the words of Al-Asha: "In every year, you are a jassim of a battle - to the end of which is your consolation drawn up ... a legacy of money, and in the neighborhood, a splendor - for what is lost in the reading of your women." Which is the purest of them because of the invasion, and the evidence for the proven sharing of the two meanings is a language: the differences of the Companions - may God be pleased with them - in that and they are the people of the language. Some of them believed that "what is meant by recitation is purity, and some of them saw that it is menstruation." Each of the two parties weighed his opinion with evidence, as follows<sup>165</sup>:

6.1.1 Feminizing the name of the number three, which indicates that the numbered is masculine, and this suggests that what is meant by recitation in the verse is purity, because if the purpose of menstruation was to come with the wording of three masculines, not feminine.

6.1.2 If recitation is combined with recitation, it means purity, and if recitation is combined with recitation it means menstruation. And if it was a singular that could have the two meanings: menstruation and purity. And Hanifa responded by saying: If this was true, the Companions, may God be pleased with them, would not disagree about that, for they are the people of the language and I know it.

6.1.3 That God Almighty said: (So they divorced them for their sake). And the meaning of (so they divorced them for their return) at the time of their waiting period, which is the time during which divorce is enjoined, and in the sense of (and counted the waiting period), what the divorced woman takes, which is the purity, as the Prophet, peace and blessings be upon him, said. What is meant by reading in the verse is purity.

The Rightly Guided Caliphs, Abdullah bin Amr and Ibn Masoud see this as the opinion of many of the Companions, and it is the opinion of the majority of the Taabi'een, according to which Abu Hanifa and Ahmad took in a narration, that what is meant is "reading in the verse of menstruation" and they supported their opinion with the following:

6.2.1 The Prophet -- said in the case of the woman who is obliged to pray: "Leave prayer during the days of its reciters." They see that the use of recitation in menstruation is here, which indicates that the recitation is singled out for menstruation without purity. This is supported by the Almighty's saying: "The one who is menstruating from the menstrual cycle is the place of your wives.

165 24- Al-Qurtubi, Al-Jami, al-Ahkam al-Qur'an, edited by: Hisham Samir Al-Bukhari, ed: Dar Alam Al-Kutub, Riyadh, Kingdom of Saudi Arabia, year: 1423 AH / 2003 AD.

6.2.2 That the wisdom behind legislating the waiting period is to recognize the innocence of the uterus and its freedom from pregnancy, so that the lineages do not mix, and what shows that is menstruation, not purity.

Several issues result from this difference, including the following:

3.3.1 The waiting period for the end of the waiting period: With regard to the interpretation of the recitation of the purity, the woman's waiting period ends if she enters the third menstruation. As for those who interpret it as menstruation, it ends with entering into the fourth purification (Islamic jurisprudence and its evidence) which includes legal evidence, doctrinal opinions, the most important jurisprudential theories, and the verification and graduation of the hadiths of the Prophet.

3.3.2 It is permissible for a woman to marry another woman if she enters the third menstruation according to the one who interprets the recitation with the purity, and after the end of the third menstruation, according to those who interpret it as menstruation.

The second example: The difference of the jurists regarding the meaning of menstruation in the saying of God Almighty: And they ask you about menstruation, say it is a harm, so remove women during their menstruation (Surat Al-Baqarah: 222). Scholars differed as to the meaning of menstruation. Because it comes as a source, and it comes as a name for the place, meaning: it is a common phonetic meaning the place of blood, or the time of the presence of blood, according to two sayings as follows:

3.4.1 The first view: The Hanafis, the Malikis and the Shaafa'is went to the fact that menstruation is a name for the place, and the meaning is: they retired from the place of menstruation, which is the vagina, and they said: It is permissible for a man to engage his wife in the vagina without penetration. Because the command to retire in the verse relates to the place of menstruation, meaning: in the vagina, so they said: It is permissible for a man to kiss and embrace and take and go under the navel and at the vagina without penetration, but what is forbidden is penetration. During menstruation. Meaning: they retired from the place of menstruation, which is the vagina only, or they stopped inserting the vulva into the vagina, but otherwise, you have the right to enjoy your wife as you wish. They said: from the Sunnah what supports this meaning. He said: "Do everything but the marriage" meaning: intercourse<sup>166</sup>.

3.4.2 The second saying: The Hanbali and Dhahiriyah went to the meaning of the Almighty's saying: "Then remove women in the menstrual cycle" means: the time of menstruation, meaning: that a man does not start with his woman when she is menstruating, and he has the right to do what is above the navel and below the knee. Allah on her authority - that she said: "The Prophet used to order one of us while she was menstruating to wear a woman, and to start with her from above the mizarah." So they said: This is also evidence that the meaning is: do not approach her during menstruation. He penetrates the vulva, even if she is menstruating.

166 25- Al-Nawawi, Abu Zakaria Muhyiddin Yahya Bin Sharaf (deceased: 676 AH), Rawdat al-Talibeen and the Mayor of the Muftis, edited by: Zuhair Al-Shawish, T: The Islamic Office, Beirut - Damascus - Amman, 3rd Edition, 1412 AH / 1991 AD.

### Conclusion

The choice of the appropriate application depends on the need first, as the system that fulfills your needs without much programming, customization and change remains the most appropriate one, and the cost has a major impact on the decision, which does not stop at the cost of purchasing those systems, but on the cost of implementing and maintaining them periodically. As some of these systems require high periodic costs, which requires a strong justification for owning and using them. And open source applications may be a suitable option for many establishments, as these applications have proven remarkable success and highly dynamic in achieving customer requirements and have, over time, possessed a large community of developers and supporting companies that contributed to that success.

Concerning the verbal common, it is an expression indicating two or more different definitions alike, and it exists and cannot be denied. The verbal joint is a sign of the development of the Arabic language. The permissibility of the common verbal person in speaking absolutely, in the Qur'an and Sunnah, and others. Because usage is a sign of participation, whether the verbal participant is less or more, which is that it is present in the language and has a role in determining this or that connotation. The presence of verbal participation in some legal texts was a reason for the differences of jurists, and thus their jurisprudential rulings. Studies must be carried out that concern the words of the verbal common, and their effect on the difference of rulings, and this type of studies is what our libraries lack today.

### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

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## TIME MATCH BETWEEN POLITICAL THOUGHT AND POLITICAL ACTION AT THE BEGINNING OF ISLAM



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### Abstract

**Background:** Islam emerged in Arabia land; a land without government in which the Arab tribes lived scattered. Domination and acceptance of Islam led to the alliance of tribes and reaching a trans-tribal situation. With the formation of new nation, the first signs of establishment of government were revealed. After the demise of the Prophet, the first scientific-ideological conflict began in Islam; In Islamic society after the Prophet, who should take the responsibility for the leadership and how a leader should be elected or appointed were the first political questions and the approach of power implementation in this religious society. This is the issue that the author tries to review it in the present paper.

**Conclusion:** These important questions and trying to find answers through the words of the Prophet Muhammad and the Quran can be considered the first theological discussions in the Political Thought of Islam.

**Keywords:** Islam – Thought – Government – Politics – Political action.

### Introduction

The foundation of the first community of Islamic government was built with the migration of the Prophet from Mecca to Medina. In the absence and lack of a stationed and former state in Arabia and a state power, a new state-like foundation was formed in this country for the first time with the combination of religion and power. The sunnites believe that the demise of the Prophet, there were no instructions and criteria for selecting a successor, whereas the Shiites believe that the prophet determined his successor and introduce him to the people in the last year of his living. From the selection of Abu Bakr as caliph or imam in the absence of the bin Hashim, at least the following seven essential points can be extracted:

- .....
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1. The need to a caliph for governance
2. The theory of Qureshi Caliphate
3. Reasoning and sophistry method to prove the legitimacy
4. The subject of two Imams
5. The people who bind and loose (ahl-al halwal- aqd)
6. Consensus (Ijma)
7. Allegiance

Omar, the second Caliph was appointed by the first Caliph that then the theory of substitution was derived from it. The third caliph, Othman, was chosen by a Six-member council of the companions designated by Omar which created the theory of council. Ali, the fourth Caliph, was elected to the Caliphate according to the theory of common election and public vote that is flushed with today's democracies. During the sovereignty of the first four caliphs, the political words Imam, Caliph, and Amir had almost the same meaning. Reviewing the history of the early political thought of Islam shows that referring to the Quran and Hadith was one of the most important practices to prove the integrity and legitimacy of affairs, not philosophy and thinking based on critical, self-reliant human intellect. It can be concluded from what happened that political action has had precedence over political thought in political theory of the sunnites.

#### The era of the Prophet Mohammad

Islam begins with the descent of the first verses of the Quran to the Prophet. According to verses 214 and 215 of Al-Shuara (The Shuara Sorah) which says: "Warn your tribe and your near kinsmen and lower your wings to the believers who follow you"<sup>168</sup>, the Prophet invited his relatives to his house to promote and establish his teachings, offer Islam to them, and ask them to support him. This can be considered the first political-social movement of the Prophet. Some scientists believe that the Prophet migration from Mecca to Medina and establishment of government is beginning of the political history of Muslims.<sup>169</sup> The foundation of the first community and Islamic government was built with the migration of the Prophet from Mecca to Medina and Muslims turned from a mere religious nation to a religious-political one. With the boom of Islam in Medina and establishment of the first organizations in this city, tribes became united and a new foundation was formed in this land for the first time with the combination of religion and power in the absence and lack of a stationed and former state and a state power. This combination created a sense of Arab nationality and forming of concept of ommah that overshadowed a large part of the civilized world of that time by its power in less than fifty years. This newly-emerged power spread to Morocco in the sides of the Atlantic Ocean in the west and the sides of India in the east. The Prophet taught the spiritual brotherhood accompanied with the universal law of Sharia and acquisition of complete political domination inviting other nations to Islam with the use of reasoning, convincing necessity of oppositeness of enemies and needing of equipping to of military power. The Prophet enabled his followers to simultaneously reach from polytheism to monotheism, from tribalism to nationalism and then to internationalism.<sup>170</sup>

168 Quran 26:214-215

169 Ghadery, Hatam, Political Thoughts in Islam and Iran, Tehran, Samt, 7th ed, 1385, p9.

170 Black, Antony, The History of Political Thought; From The Prophet to The Present, Trans by Mohammad Hossein Vaghar, Tehran, Ettelaat pub, 3rd ed, 1386, p.15.

It can be said that at the beginning the emergence of Islam thinking style and mental space of Muslim Arabs was teemed with the last tribal images. Despite the Prophet's great emphasis on the need to avoid ethnic and tribal prejudices and to focus on Islam as the doctrinal basis of Muslim unity; this approach continued after his death. This approach continued to exist in most of the living history of the Islamic communities and even in mountainous areas and deserts until the 20th and 21st century.<sup>171</sup>

Thus tribal identity still found its meaning in the main trend of Islamic societies and continued its life. Social realities including tribe, clan, and lineage had a considerable stability and continuity in the Arab-Muslim world.<sup>172</sup> Even after the Arabs became Muslim, some tribal customs and values continued their life and were also confirmed in Islam. Some features of this tribal society were directly transferred to the new nation.<sup>173</sup>

Despite the lack of codified political theories, Muslims had political-social actions in construction of a modern society that were taken from divine commandments. Practices such as prayer, Hajj, etc that was the cause of political and social in the modern nation. However, some like Ali Abdul Al-Raziq and Dr. Mehdi Haeri Yazdi believe that government establishment by the Prophet was according to the natural need of human society rather than divine and religious duty. They also believe that the government of the prophet is a human issue and has nothing to do with God and religion.<sup>174</sup>

#### The selection of the first Caliph (Beginning of political thought and practice in governance)

Prophet Muhammad died in 632 (AD). Some of great men of Ansar and the immigrants had a meeting to select a successor to the Prophet in a place named Saqifah. None of two sides had real unity and Bin Hashim from the immigrants leading by Imam Ali (the son-in-law and the cousin of the Prophet) was the major absent of this meeting. There were no criteria for choosing a successor and almost nothing about political leadership or the structure of government.<sup>175</sup> Each of the Ansar and the immigrants groups began to argue for its primacy in the succession to the Prophet. So, Saqifah event can be considered the simultaneous starting point of the Muslim political thought and action. The immigrants argued the following reasons for their being entitled in the succession of the Prophet:

1. Kinship and affinity with the Prophet
2. Primacy in accepting Islam
3. Abandoning their homeland- Mecca
4. Being Qureshi as the most important tribe in the Arab ethnic group.

171 Ibid, p. 16.

172 Guichard, p.(1977), Structures Sociales Orientales et Occidentales dans l'Espagne musulmane, Paris, Mouton & Ecole des hautes études en sciences sociales, p.23.

173 Helms, (ed), Essays on the Problem of Tribe, University of Washington Press, 1967, pp.1 & 24.

174 Mohajerani, Ataollah, Islam and West, Tehran, Ettelaat pub, 1382, pp.112 & 143

175 Black, Antony, Ibid, p.22.

By contrast, the immigrants, previous residents of Yasrebi proposed the following reasons:

1. Harboring the Prophet
2. Residence of the Prophet in Medina and declaring this city as the center even after the conquest of Mecca
3. Helping to Islam and Muslims

Each of these two groups of the immigrants and Ansar referred to the Prophet's words and behaviors which were said or done in various situations about a certain person or group of them and interpreted then to their own benefit. Abu Bakr with Omar Ibn al-Khitab and four others were present in Saqifah on behalf of the immigrants. Ansar also introduced Saad al-Ebadeh as their representative. Ansar had a negative attitude to the attempts of some immigrants over power and governance. Abu Bakr resorted to narrative "Imams are from Quraysh" against the government claim of Ansar quoted by the Prophet and said that Ansar can be sure of having ministry. This narrative was effective according to general claims of Ansar and they stepped back from their wishes and called for the establishment of a government ruled by two rulers, "From us one Amir (boss) and from you one Amir" one from the immigrants and one from Ansar. Abu Bakr again resorted to another narrative of the Prophet, in which priority and superiority of Quraysh was stipulated; "Qurashis have priority and no one has priority over them, they educate others and there is no one to educate them ..."<sup>176</sup>

Finally, Ansar accepted the government of the immigrant's companions. Omar and Abu Ubaidah, two Qureshi immigrants refused to accept the suggestion of Abu Bakr being Caliphate to each of them. Mutually, they declared Abu Bakr a nomination of Caliphate. Omar comprehensively tried to show Abu Bakr superior to himself and mentioned the background of Abu Bakr in Islam such as being a close friend to the Prophet in travel from Mecca to Medina and being liturgist when the Prophet was sick. Eventually, those presents in Sqifah swore allegiance with Abu Bakr as the successor to the Prophet. Abu Bakr was the Caliph from 632 to 634.

If Bins Hashim and Imam Ali were present in Saqifah, a worse anecdotal and narrative-citation conflict would take place. After hearing that Abu Bakr had referred to being Qureshi of Imam, Imam Ali believed that they had argued the tree but ignored its fruits.<sup>177</sup> This was the starting point of Sunni and Shiite that are two major branches of Islamic sects. Omar later described Saqifah an even with a happy end.<sup>178</sup> Abu Bakr also talked about his dreams in the final moments of his life. He had two wishes that asked the Prophet some questions about the emirate of Muslims:

- Who is entitled for the Caliphate after the Prophet?

- Did Ansar have the right in Caliphate?<sup>179</sup>

176 Ghadery, Hatam, Ibid, p.10.

177 Ansarian, Ali(with attempt), Al-Dalil ala louzooatiNahjolbalaqa, Tehran, Jahan Pub, 1357, p.517.

178 Al-Tabari, Abu Jafar Mohammad Bin Jarir, Tarikh al-omamwalmolook, 3rd ed, Beirut, Dar al-toras, n.d, p.205.

179 Masaudi, Ali Bin Hossein, Morooj al-zahab, Trans:Abo al-qasimpayande, 8th ed, Tehran,Elmi&farhangi Pub, 1387, p.658.

Words exchanged in Saqifah and the way of deduction, sophistry, and its structural form played a special role in formation and construction of Muslim political thoughts. This role is that quote of the Prophet, the Quran, and Hadith are used to prove the legitimacy and integrity of its idea and philosophy and thinking based on critical, self-reliant human intellect are not used on who and how should govern and how should be chosen, but religious issues and roots are the reference (Beginning of theology and political jurisprudence).

Theoretically, at least the following seven essential points can be extracted from Saqifah even:

1. The need to a calipha for governance: After the demise of the Prophet, it was felt that someone should take the responsibility of leader, Imam, or the Caliph of the Prophet. On the other hand, there was almost nothing about political leadership or the structure of government (According to the Hadith of Ghadir, Shiites have a different ideaand believes that the Prophet had completed the mechanisms of appointing his successor to lead the ummah and manage the society.). This verse which says, „Believers, obey Allah and obey the messenger and those in authority among you. Should you dispute about anything refer it to Allah and the messenger, if you believe in Allah and the last day. That is better and the best interpretation,“<sup>180</sup> are mostly referred. Hadith collected many years later were also referred. The important point is that the principle of Kingdom meaning monarchy was strongly rejected and considered a special advantage to God.

2. The theory of Qureshi's Caliphate: Reference of Abu Bakr to the narrative Imams are from Quraysh can be considered the most important interpretation in the selection of Muslims' Imam or Caliph, as became more common later. This impression was emphasized for centuries and still has some fans. This principle was supported by many theoreticians and jurists like Maverdy, Ibn Fara, and Ghazali. By contrast, Mu'tazila and Khawarij didn't consider this condition.<sup>181</sup>

3. Reasoning and sophistry method to prove the legitimacy: The way of selection and arguments presented in Saqifah event indicate that there was no previously thought framework about the ruler. Another point is that the Prophet's words were referred to prove the integrity and legitimacy of their idea (Beginning of news school), not critical, self-reliant human intellect. This method of reasoning and sophistry and taking advantage of Hadith and narratives became the superior and dominant style of reasoning in all subsequent periods of Islamic thought history.

4. The subject of two Imams: "Two Imams Cilaphate" which was proposed by Ansar in Saqifah was one of the theoretical achievements. In this model the intention was allegiance with two Imams or two Caliphas in one territory, which was not welcomed and accepted? The action of Abdullah bin Zubair at Mecca and the Hejaz and simultaneous Caliphate of the Umayyad of Andalusia and the Fatimids in Egypt are two examples of the governance of two Imams or Caliphs in different lands and territories.<sup>182</sup>

5. The people who bind and loose: the people who bind and loose are a group of elders and the heads of tribes who have an honorable position and social status to remove a problem and establish a new thing. This theory was initially due to the lack of official in the community and the selection of the first Caliph caused the emergence of this theory in Islamic political thought. Var-

180 Quran 4:59.

181 Ghadery, Hatam, Ibid, p.12&13.

182 Feirahi, Davood, Political System and State in Islam, 8th ed, Tehran, Samt, 1389, p.89.

ious theories have been proposed in terms the people who bind and loose and their characteristics. Imam Abu Hanifa, founder of Hanafi religion- The first juridical school of Sunni-, accepted the idea of the people who bind and loose and found it superior than other selection methods at least with two persons.<sup>183</sup> The people who bind and loose in jurisprudence of Sunni means the people who possess empowerment: "Ahli al-ikhtiar" that three conditions have been mentioned for them. These conditions include justice, adequate knowledge of Caliph and those eligible for Caliphate, and contrivance which leads to the selection of the most qualified and eligible person for the Muslims.<sup>184</sup> The theory of the people who bind and loose has been rarely theoretically, quantitatively, and qualitatively reviewed in the history of Islamic thought.

6. Consensus (Ijma): Consensus means a collective agreement on a particular topic. In the view of Sunnis, consensus is the greatest justifying and legitimizing principle of political regime, especially for Rashidun Caliphs. From the perspective of Sunnis, companions agreed that someone should be the successor to the Prophet after his demise and no one heard of companions that even one had talked in refusal of Imam or Caliph. Thus, they proved the consensus of companions on the necessity of Caliph Position, this principle of consensus which legitimizes the Caliphate. In political system of Sunnis, consensus is not on Caliph but it is on the necessity to establish the Caliphate as a political system. Quran, Sunnah of the Prophet, and the companions are three sources of consensus in Sunni religion.<sup>185</sup>

7. Allegiance: Allegiance is a bilateral treaty and agreement that one side is the Caliph and the other side is the nation. Allegiance is also defined as oath of loyalty. Saqifah was done with the acceptance of the Caliphate of Abu Bakr by the people who bind and loose and proposal of Bashir Ion Ebadeh from Ansar. There are two types of allegiance; particular allegiance which is the allegiance of the people who bind and loose with the Caliph and general allegiance which is the allegiance of Muslims.<sup>186</sup>

Theory of substitution (Istikhlah): The first Caliph died in 634 (AD) and had elected Omar as his successor before death. This method underlay the establishment of theory of substitution in political system of Sunnis. According to this theory, the Caliph, as the official of the Islamic community, has the authority to select the next leader to guide and govern the community. But there is no acceptable answer to the question that why didn't the Prophet select his successor himself in this theory. Omar was the Caliph for 12 years and many lands were conquered in this period. Muslim gradually became familiar with the concepts like state, government, and thinking. With the influx of booties, wealth, and the need for bureaucracy, political governance of Islam started from the period of Omar.

The theory of council: The historical basis of the theory of council goes back to the selection of six companions of Islam by Omar (the second Caliph) to choose the next Caliph. According to the theory of council, when the Caliph don't want for specific reason to implicitly or explicitly choose a successor for the Caliphate, he can organize the power transfer and selection of successor by establishing an assembly. Since the members of this council or assembly are chosen

183 Sharif, Mian Mohammad and Colleagues, *The History of Philosophy in Islam*, Trans: Nasrollah Poorjavadi and Colleagues, 2nd ed, Tehran, Daneshgahi pub, 2 vol, 1370, p, 135.a

184 Feirahi, Davood, *Ibid*, p.36.

185 Hasn, Hasan Abbas, *Al- siaqa al- mantiqialilfkr al-siasia al-islami*, Beirut, Dar al-alamialiltiba a wal-nashr.,1992, P. 364.

186 Al-fara, Mohammad Bin Hossein, *AL-ahkam al-soltania*, Beirut, Dar al-fkr, 1994, p.24.

by the ruling Caliph, foundations of the legitimacy of the theory of council can be found in the theory of substitution. However, the selection of Othman as the third Caliph was the first experience of this council. Of course, the Shiites hold the view that the mechanism for appointing the members of this council and the way of voting in it was regulated in such a way that it became clear that one of the members of this council (Abd al-Rahman ibn Awf) had a veto and a fundamental role in appointing the caliph.

The election of the fourth caliph, Imam Ali, was largely based upon the popular choice and public opinion in today's democracies. That is, in the period of intermission caused by the assassination of the third caliph, with the general election and allegiance of a large number of the companions and the people of Medina, the caliphate of Imam Ali was established.<sup>187</sup>

### Conclusion

In early Islam, there was no political theory or particular guidelines for the issue that who and how should govern and how should be chosen (Shiites have a different idea in this regard). In early history of Islam, especially from the demise of the Prophet to the selection of the fourth Caliph, political action had priority over political thinking and theory. Following the development of behaviors and political systems, political theories were created. This indicates that Caliphate types have been emerged within the framework of various components of Islamic community and power struggles. Formation of these theories goes back to the Abbasids Caliphate. Authors and jurists like Maverdy and Ibn Fara have a superior position due to relative completeness of their writings and their priority. Another important point is that Islamic thought is mainly focused on Quran, Sunnah, and Hadith, not philosophy and thinking based on critical, self-reliant human intellect.

### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

187 Ghadery, Hatam, *Ibid*, p.26.

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**INVESTIGATING THE COMPONENTS AND SYMBOLS OF WAR IN MUSLIM CHILDREN'S LITERATURE WITH EMPHASIS ON THE ZAKARIA TAMER'S WORKS**

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**Abstract**

War is an important issue in the world today and unfortunately many children have been the main victims of war. Children and adolescents have always suffered from the negative and unpleasant consequences of war and their innocent and simple lives have been attacked and undoubtedly harm to defenseless children is one of the bitter and lasting truths of war. Therefore, writing about war and the components of sustainability is very important for children. In this study, we intend to examine two works by Zakaria Tamer called Rabi fi alamad and Qalt al-Warda Lelsono and the effects of war in the literature of Muslim children and adolescents of this Arab author. This study is based on library study data and analytical-descriptive method. The results showed that the components of stability in the works of Zakaria Tamer include war, libertarianism, occupation, victory, homeland and peace. Using the elements of nature while expressing the spirit of compromise, Tamer tries to make war an ugly and vulnerable thing and peace a valuable and glorious issue that can bring peace to others. According to the results, he has used various symbols to express the concepts of war for example the horse is a symbol of the glorious Arab past and the victories achieved by the ancestors on the battlefield. He depicts the river as a symbol of freedom and liberation and the sparrow is a symbol of the oppressed that are killed by the enemy and cannot defend themselves. The rooster is also a symbol of conscious human beings who can move towards victory by rescuing the homeland from the siege and occupation and the bully is a person who is unable to fight oppression and wants to defend himself by paying a ransom to the oppressor. In Tamer's mind the fighters of the homeland are people whom nothing can stop on the battlefield. In fact, they take their lives for nothing and go to war with the enemy to defend the integrity of the country.

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**Conclusion:** Tamer's use of natural elements in children's stories causes the child's mind to establish an easy and understandable connection with the essence of the subject so he can express his main and desired meaning in this way. In general, these stories form the beginning of the right path for Arab children and spread human, ethnic and militant values in a novel language and in the form of modern art.

**Keywords:** Children's Literature – Components of Sustainability – Literary Symbol – Zakaria Tamer.

### Introduction

War is a well-known term that refers to armed and violent clashes between two or more governments or ruling groups. The phenomenon of war can be studied from different perspectives. From the past to the present, war literature has been a favorite work of all ages even children and adolescents. Undoubtedly, war is an important issue in the world today and many children have been and are the main victims of war. So this issue also belongs to children. War has never been limited to commanders, soldiers and the military and what makes war bitter is the civilian conflict in war. Today „children's literature“ in its broadest sense is all the texts that children and adolescents read and that stimulates and nurtures their emotions, imagination and thinking. According Hejazi, 2003: Children's literature is a collection of works and writings (books and articles) that are prepared by expert authors for the free study of children, and in all of them, the taste and level of development and maturity of children are considered. The beginning of this type of literature in the Arab countries, especially Egypt, Syria and Iraq, was in the form of translating the works of famous French writers and adapting their works. Zakaria Tamer Souri, the father of short stories, is one of the most important innovators in this field, whose stories for children include the spirit of jihad, the struggle against oppression, inequality, poverty and ignorance. He is not only a popular writer and a representative of his troubled society, but he also pays attention to the basic issues of humanity. In his stories, he recounts hunger, poverty, bigotry, oppression and government pressure on the people. So far, numerous works on the effects of war have been published in children and adolescent literature around the world. For example, Moghaddari and Jahangir (2015)<sup>189</sup> critically analyzed the poetry of sacred defense for children from the perspective of Van Lemon's approach. According to the results of this research, discourse-oriented components have been used in children's poetry and the amount of literary components has been more. Abedi and Zinivand (2016)<sup>190</sup> in a study entitled „Childhood Imagery and War in Mostafa Rahmandoust's Poetry“ examines the characters, the various combinations of the focus of narration (the omniscient and the infinite whole, the narrative self, and the types of monologues), the imagery, the language games and the choice of different titles for the poems and studied a wide range of symptoms in dealing with childhood and war. This study was performed by descriptive-analytical method, case evaluation and statistical table. Sharififar (2003)<sup>191</sup> in a study examined the psychological aspects of war in children. According to the results, intense fear, nightmares, repeated reminders of the incident in the form of repetitive dreams, repetitive games, reconstruction of the accident scene in the mind, from Behavioral disruption, emotional behaviors, irritability, nervous behavior in reaction to people and ob-

189 Meghdari, Sedigheh Sadat and Shokoofeh Jahangir. Critical Analysis of Sacred Defense Poetry for Children from the Perspective of Van Lemon's Approach, 19, 65 (2015): 121-160.

190 Abedi Hossein, Zinivand, Touraj Illustration of a child and war in the poetry of Mostafa Rahmandoust. National meeting of the Iranian Persian Language and Literature Promotion Association. 2016.

191 Sharififar, Simin Taj. "Psychological aspects of war in children," *Journal of Medical Sciences of the Army of the Islamic Republic of Iran* First year-No. 4. (2003): 247-253.

jects around the child, avoidance of thinking, feeling or being in places that are reminiscent of the accident, and mental numbness are symptoms of a child with post-traumatic stress disorder. Early intervention and appropriate family and social support are effective in the child's adaptation to disaster.

Hassani and Seyed Rezaei (2012)<sup>192</sup> studied the image of war in the poetry of Iranian children and adolescents. The results made it clear that the poetry of war is a reflection of the sufferings, joys, sorrows and aspirations of most of the children of this land. In addition, overcoming oppression is the most prominent message of poetry for children and adolescents. Arab Yousefabadi et al. (2015)<sup>193</sup> in their study examined child and war, the connection between two motifs in Persian and Arabic poetry. The results showed that topics such as the epic of heroism, belief in victory, the spirit of resistance, honoring the martyrdom and memory of the wounded and martyrs of war are the most important common themes in Persian and Arabic children's poetry. Therefore, poets are trying to convey the message to the child that right will always triumph over oppression and falsehood and by doing so they will revive a kind of hope and desire in their hearts. Sarfi and Hedayati (2013)<sup>194</sup> studied the symbolism and violation of symbolic elements in the stories of children and adolescents of war. According to the findings of this study, the use of symbols to objectify the events and facts of war for children and adolescents is an artistic tricks and this category of works in addition to bringing the minds of specific audiences to the flow of these events will also enrich the literary works of children and adolescents.

The aim of this study is to investigate the reflection of war in Muslim children's literature. Children are the heirs of the soil and water of every frontier and the main victims of wars. As the Middle East War unfolds, we are witnessing the successive massacres of innocent children and what better than literature express the need for peace for children.

### Materials and Methods

The present study is based on library study data and has been done using analytical-descriptive method. In this article, two works of Zakaria Tamer were studied. The great Syrian writer Zakaria Tamer has about 150 short stories, many of which were written for children and teenagers; This makes him one of the most famous writers of children's literature in the Arab world. In this regard, first both works of Zakaria Tamer were thoroughly studied and his thoughts were introduced. After collecting and categorizing the materials of his works in the field of war in the next stage based on the information obtained a relatively complete description of the subject was provided. Simplicity of language is one of the characteristics of Tamer stories; The simplicity of language is very valuable in children's stories; because it prevents distractions.<sup>195</sup> In such stories, the subject and style of writing are combined to achieve a sin-

192 Hassani, Tahereh, Seyed Rezaei, Tahereh. "The Image of War in Iranian Children and Adolescents' Poetry," *Quarterly Journal of Persian Poetry and Poetry* 5, 2 (Summer 2012): 163-147.

193 Arab Yousefabadi, Abdul Basit; Arab Yousefabadi, Faezeh and Shahriari, Leila, 2015, Child and War: The Link of Two Motifs in Persian and Arabic Poetry, The First National Conference on Children and Adolescent Literature, Pomegranate <https://civilica.com/doc/512393>

194 Sarfi, Mohammad Reza, Hedayati, Fatemeh. "Symbol and role of symbolic themes in the stories of children and adolescents of the Holy Defense," *Journal of Sustainability Literature* Fourth year, number eight. (2013): 1-17.

195 Omid Majd and Mirout Salman, "A study of children's literature in Iran and Syria based on two works by Nader Ebrahimi and Lina Kilani," *Quarterly Journal of Comparative Literature Studies* 8, 29 (2016).

gle work. The straightforward, uncomplicated prose of these stories is in fact a mirror that reflects an empty life. The language of his story is very simple and clear in which the words have their true meaning; because the limited space of the story and the excessive shortness deprive the author of the opportunity to use literary arrays. He conveys his message easily by using appropriate words. By choosing the word in the true sense and establishing the connection between the words using proportions, contradictions and contrasts, Tamer combines simplicity with the stability and depth of the structure. In addition, he creates a text far from any rhetoric and complexity with a dignified tone and avoiding industrialization and arrangement. These stories are the beginning of the right path for Arab children and spread human, ethnic and militant values in the form of modern art in a novel language.

### **Discussion and Findings**

#### 1-3 Psychological characteristics of children and adolescents

First let's take a brief look at the psychological characteristics of adolescents and see the reflection of these characteristics in war fiction. The age of children and adolescents is the most sensitive and decisive period of human life. The set of direct and indirect trainings has a profound effect on the formation of a person's future personality. Here are four psychological characteristics of children and adolescents that should be considered when creating art works.

- A - The impact of society
- B - The desire to think and reflect
- C - Paying attention to artistic productions
- D - Increasing one's patience

Today's children and adolescents can reflect on the highest human values and enjoy spiritual joy by reading the story of war.

#### **The result of writing a war story for children and adolescents**

1. Proper satisfaction of the spirit of heroism
2. Displaying the various moral values
3. Imaginary participation and presence in war
4. Blowing the epic spirit in them
5. Psychological preparation for future battles
6. Values explanation

#### **Illustration of War in Children and Adolescent Literature**

Poets and writers in addition to conveying historical and national concepts have also narrated religious and Islamic teachings in the form of war stories for children and adolescents. Thus, such works are not only cross-sectional but can be considered forever because of their human and religious themes. Attention to themes such as enduring the oppressive conditions of the front, the importance of the first time prayer, the preference of weak people and children and adolescents over other people in difficult conditions, contentment, veterans, etc. are all among these concepts.

„Of course we have to write about war for children and adolescents. They have to get acquainted with the war as if the war might happen to them and basically the war happened to some of them. They were either war-torn or attacked by planes or may have been on the battlefield as a teenager. So writing about war is a necessity, but we must pay attention to their age differences. If we can introduce the child to death and disability in the story, he can cope better with such problems in the real world.“<sup>196</sup>

War imagery generally includes three basic and general spectrums: (according Mohammadi, 1999).

- A) Positive and pragmatic imagery: In this attitude, spiritual and human values are usually introduced in the story or poem, and it inductively tries to indirectly teach the basic concepts of value to the reader.
- B) Realistic imagery: In this attitude, the author deals realistically with all the devastation, destruction and events of the war.
- C) Negative imagery: This type of story is mostly directed by intellectuals who did not have an active presence in the war and only sympathizes with the victims by chanting anti-war slogans.

#### **Developments in children's and adolescents' fiction literature**

The well-known defeat of the Arabs against Israel on June 5, 1967 or the defeat of June was closely linked to developments in children's and adolescent fiction. After this defeat many writers of Arab children's literature dealt with the war and its effects on this group. This defeat had a profound effect on Zakaria Tamer. „After the June war, I became more connected to reality and my perspective on children expanded. They were a generation that had to respond to this savage enemy; So the sense of struggle must be awakened in them. They had to change drastically to become a generation capable of self-sacrifice and sacrifice for justice, freedom and prosperity“. Tamer believed that it is impossible for children to grow up healthy in a society where their parents were suffering from oppression and misery. According to him real and special attention to children and adolescents depends on simultaneous attention to adults.

#### **Zakaria Tamer's view on the analysis of sustainability literature of children and adolescents**

It should be said that „war has always been against humanity and that is why the historical sources of countries are often descriptions of wars and many literary and artistic works are also indebted to this ominous phenomenon. But undoubtedly whenever this ugliness has taken on the color of defense and has occurred under the pretext of expelling the aggressor from the homeland, it has become a sacred practice and considered beautiful, and participation in it has been called courage.“<sup>197</sup>

196 Hanif, "Stages of creating," 2007.

197 Hanif, Mohammad. Stages of creating a story Tehran Sur Publishing 2007.

## Components of sustainability in the works of Zakaria Tamer

### A. War

In these works, Tamer expresses war in a way that is understandable and tangible to children; using words such as horse, homeland fighters and sword and with this type of expression, while avoiding the negative impact on the child's mind he conveys the concept of war to the audience:

The concept of horse in the works of Zakaria Tamer

The horse is a symbol of the glorious Arab past and the victories of the ancestors on the battlefields, so Tamer seeks to revive the zeal of those warrior riders in the souls of Arab children.

Somewhere Tamer describes the horse as follows:

„Do not be afraid, I am a horse who fought with your ancestors in hundreds of battles. The children say, „Our ancestors are dead, how did you survive?“ Two children are fascinated by talking to a legendary horse who escapes the clutches of death and learns from him the meaning of resistance, struggle and the place of weapons in battle. The children ask the horse to stay with them, but the horse says, „I cannot stay with you because I am looking for the oppressed all over the world to guide them to the weapon by which they fight the oppressors and that is why I always avoid death.“<sup>198</sup>

### Zakaria Tamer's view on the fighters of the homeland

According to Tamer the fighters of the homeland are people who cannot be stopped by anything on the battlefield and that are why they consider their lives worthless and go to war with the enemy to defend the integrity of the country:

Tamer describes the homeland fighters as follows:

„The enemy attacked the city. Ayoub drew his sword and wanted to leave the house. His wife begged him: Stay at home! „If you fight, you will be killed.“

„Death is now just scary for those who do not love their mothers, fathers, children and homes,“ he told his wife.

### B. Liberalism

In his works, he uses words such as river to express freedom. He believes that freedom is possible in the light of consciousness and depicts the river as a sign of freedom and liberation. The Marwa River is a symbol of freedom; A river that once flowed on the earth but with the arrival of oppressive and colonial governments it has separated from its former freedom and in fact, freedom has diminished. Until a libertarian comes and saves the country from drought by rescuing the country from the colonialists. Drought is a symbol of a world of oppression that has gripped the homeland and deprived it of its right to freedom and liberation. In the story, Tamer establishes a close connection between the main character and the river, so that the river is happy with the release of the main character and is sad by his arrest. In this story the sound of the river is a symbol of freedom, which at first is scary and like a howl but then disappears. Omar al-Saadi's character in this story is preoccupied at first and after his arrest his thoughts are finally drawn into the abyss of destruction. At the end of the story the character is transformed and longs for freedom and as a result one can feel joy in the river.

198 See also: Tamer, Zakaria. 2010; Tamer, Zakaria. Rabi Fi al-Ramad, Damascus: Dar al-Awda. 1994; Tamer, Zakaria. Qalt al-Warda for Lansuno, Lebanon: Dar al-Hadaïq for printing, publishing and distribution. 2003.

Zakaria Tamer uses the symbol to raise the issue of freedom and liberation from the trap of domination. The expression of protest, anger, rebellion, endurance and resistance of Omar Al-Saadi against oppression, expresses the inner thoughts of Zakaria Tamer:

„Omar al-Saadi heard the roar of a ruthless country, and his voice rose in imitation of the voice of a cat; At first his voice was frightened and helpless, but he did not delay in his work he intensified his voice and mixed it with the cat's meow in a terribly harsh cry ...“ Omar started shouting and as the guard approached the cell door, he was overjoyed, so he got up and stood up firmly and eagerly waited for the guard to kick.“

The cruelty of the man in the war with the forest dwellers causes him to punish them with the sword and put them in the worst possible conditions. In this story, the sparrow symbolizes the oppressed and defenseless people who are killed by the enemy.

### C. Occupation of the homeland

In his works, Tamer tells the story of a man named Ayub who intends to defend the homeland against the enemy invasion and prevent its occupation. Ayub is not armed to fight the enemy, so he decides to defend the integrity of his homeland by preparing a sword from a plow. Tamer tries to acquaint the child with defense and struggle and to show that man can save his homeland from the clutches of the enemy by any means:

„Once upon a time there lived an honorable man named Ayub. He loved his farm and his house. He loved children, flowers and sparrows. One day he realized that the enemies wanted to occupy their city, so he decided to fight them but had no weapons. So he made a sword out of his plow.“ Ayub went out of the house and looked at the houses, the streets, and the people; He felt his heart beat with love and did not recognize failure. So he drew his sword, but stood for a moment and wondered what the enemies would do to the city if they won. The people will lose their bread and freedom, and the children and the flowers and the houses will have no destiny but death. „At this time, he became very angry and went to the enemies and fought them with courage and bravery.“

### D. Victory

Tamer speaks of a fighter who achieves victory on the way to the goal and the enemy can not defeat him:

“People defeated their enemies. Ayub returned home tired and happy and slept for a long time. He woke up at sunrise and soon turned his sword into a plow and returned to work on the farm, laughing happily. His plow will turn into a sword again in times of danger and he will fight the enemies.”

Tamer uses the rooster as a symbol.

In childish language, Tamer speaks of a rooster that prevents the enemy from dominating the homeland, so the children realize the importance of fighting and achieving victory. The rooster is a symbol of conscious human beings who by their behavior can save the homeland from siege and occupation and lead it to victory:

The rooster lived in a city whose inhabitants believed that sleep would eliminate grief and disease and bring health and happiness to humans. The people of that city hated the rooster that always sang and woke them up.

One night the inhabitants of the city were in a deep sleep as usual, and in the morning the enemies came to the city and tried to besiege and occupy it. The rooster saw them standing on the city wall, so he immediately walked through the streets and sang.

The people of the city woke up hating the rooster, but after a while they noticed the enemies and defended their city. After a fierce battle, they were able to drive out the enemies and defeat them.

From that day on, the rooster sang every morning and asked the people to wake up and fight the enemies.

### E. Homeland

Tamer speaks of the originality of the homeland and the struggle for it in childish language. This sense of patriotism and struggle to regain a lost identity is seen in the dialogue between children and horse. In the other words, the author believes that we must rise up to drive out the enemies and occupiers and sacrifice our existence for the freedom of the homeland and liberation from the clutches of oppression. Drawing a picture of the greatness and glory of the homeland makes the feeling of patriotism flourish in the souls of children and that is why the homeland is of great value and importance to them:

"Strangers have occupied our house," said the girl. The horse said: Why did you not take them out? The boy replied: They have weapons and we are small and have no weapons. "When you grow up, I will guide you to hide your ancestral weapons." The horse said.

"However, the boy and the girl did not cry but laughed and returned safely to their home, which was occupied by strangers. "Using allegory, Tamer tells children about the importance of the homeland and in the language of fish describes the homeland as an important and valuable place on which our lives depend. The author's use of fish in expressing the value of the homeland makes the child's mind more prepared to understand this issue and to establish an easy and sincere relationship with the subject:

"What do you say?" Said the big fish. "Fish live only in water, and the river is their homeland in which they were born. You must love it and not be separated from it."

### F. Peace

According to Tamer, the inhabitants of the forest are those who are not able to fight against oppression and defend themselves by paying a ransom to the oppressive man and take steps towards peace and reconciliation. Sparrows with singing, trees with fruit, Roses with flowers and cats with games try to warn him of this war, but the man does not accept any of their reasons and tries to continue oppression and stay away from peace:

The sparrows said: We will sing the most beautiful songs for you.

The man replied: Gold is better than singing.

The trees said: We will give you the most delicious fruits.

The man said to the trees: I eat your fruit whenever I want and no one can stop me.

The rose said: I will give you the most beautiful flower.

The man replied sarcastically: What is the use of the most beautiful flower? The cats said:

We play the most beautiful games for you every day and we support you at night.

The man said: I do not like playing with cats and my sword is my only trusted guard.

By using natural elements, in addition to expressing the spirit of compromise of the forest dwellers, Tamer tries to make war ugly and vulnerable, and introduces peace as a valuable and glorious issue that can bring peace to others.

### Conclusion

One of the issues that the authors have paid special attention to is the resistance and stability in children's poetry. Zakaria Tamer is one of the people who portrayed resistance and stability in his speech and expressed its important aspects. As we know, children are the fu-

ture makers of the country and their upbringing is important and fundamental, so the literature of resistance and stability as one of the most important issues of the country has affected the lives of children and is reflected in their literature. In this study, we intended to examine two works by Zakaria Tamer called Rabi fi almad and Qalt al-WardaLelsono and the effects of war in the literature of children and adolescents. The results indicate the widespread use of symbols in Tamer's works and he turned to symbolism to facilitate the subject and increase children's understanding. Tamer symbols are realistic because they originate from a creative mind. On the other hand, in addition to abstract symbols the poet has also used plants and animals for symbolization. War, freedom, occupation, victory, homeland and peace are the components of stability in the works of Zakaria Tamer. By examining his works, various symbols were found in expressing the concepts of war. For example, the horse is a symbol of the glorious history of Arabia as well as the victories that the ancestors achieved on the battlefields. The river is another symbol in his works that is depicted as a symbol of freedom and liberation, and the sparrow is a symbol of people who are oppressed and killed by the enemy and cannot defend themselves. The rooster is a symbol of conscious human beings who can save the homeland from siege and occupation by their behavior. The bully is a symbol of those who do not have the ability to fight oppression and want to defend themselves by ransoming the oppressor and move towards peace and reconciliation. In Tamer's works, the fighters of the homeland are people who cannot be stopped by anything on the battlefield and who sacrifice their lives to defend the integrity of the country. In general, these stories form the beginning of the right way for children to understand the effects of war and spread human, ethnic and militant values in a novel language and in the form of modern art.

### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

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## THE BENEFITS OF ONLINE COUNSELLING IN DEALING WITH THE PSYCHOLOGICAL CONSEQUENCES OF THE COVID-19 PANDEMIC RELEVANT FOR THE POST-COVID ERA



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### Abstract

**Background:** The article discusses the specifics of online counselling that could be beneficial in critical situations not only during the COVID-19 pandemic, but also in the post-COVID era and the benefits and risks of counselling that need to be addressed when working with clients. This article is based on the results of a survey conducted in Italy involving three hundred respondents during the period January 2020 to April 2021 who, as a result of the crisis situations related to the COVID-19 pandemic, became afflicted with alcohol dependence.

**Methods:** The research was carried out on the basis of qualitative research strategies. The used tool was an in-depth online interview. The aim of the survey is to point out the benefits of the unique strategies that online counselling can provide to a group of respondents with such a problem.

**Results:** The aim of the online interviews was to make respondents aware of the symptoms of their estrangement and to provide them with help by motivating them, which is necessary in order to change their situation. The author of the survey, and at the same time the counsellor during the online interviews, worked with the potential of accepting each individual respondent. He attuned himself internally to their thoughts and mental states, made them aware of the prospect of hope, reassured them of their dignity and ability to establish relationships with the people in their surroundings, and helped them to enter a therapeutic community, which has clearly defined rules of conduct that must be respected by all members. He helped them to restore the right hierarchy of values, stimulated their will to heal and supported their gradual reintegration into society. Through online counselling they were repeatedly instructed to focus on hope, on the possibility of change, and on the fact that they are capable of achieving this change in order to begin their new life journey.

**Conclusion:** The post-COVID era opens up new challenges for online counselling, in directing this form of assistance so that it retains its uniqueness while protecting it from the risks posed by virtual reality. The given analysis can be the basis for a series of new research approaches which will be more precisely specified for the benefits of online counselling during the post-COVID era.

**Keywords:** COVID-19 – Consequences of COVID-19 – Post-COVID era – Psychological Consequences – Online Counselling.

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### Introduction

The COVID-19 pandemic and all the restrictions, as well as the serious consequences associated with it, have taken without a doubt a significant toll on the emotional, cognitive, behavioural, psychological, and social well-being of the global population. In particular, the diverse psychological consequences of the COVID-19 pandemic require the acute attention of scientists and practitioners working during the post-COVID era. In relation to these consequences it is also important to be aware of the fact that they manifest themselves to an increased extent especially in people who are already mentally fragile: transient depression, anxiety, restlessness and stress are commonly associated with similar types of crisis situations as the COVID-19 pandemic. Some of these consequences have been addressed in the research of Jiju Varghese et al. from the year 2020.<sup>200</sup> He identified some negative consequences associated with the COVID-19 pandemic, such as: "anxiety and fear of danger, intense feelings of losing control over one's life, negative emotions, depression, disorientation, psychosomatic disorders, aggression, increased risk of being manipulated or controlled, reduced ability to distinguish and analyse information."<sup>201</sup>

The promotion of mental health and well-being is, therefore, one of the major issues to be addressed not only during the pandemic but also in the post-COVID era. In order to promote mental health and well-being, a report on mental health and psychosocial issues regarding education and certain social considerations during the COVID-19 outbreak was released on 18 March 2020 by the WHO.<sup>202</sup> Specialized personal and professional guidance of people suffering from psychological problems related to the COVID-19 pandemic, as well as its consequences, is an effective response to this type of support. Counselling has many definitions. For example, The British Association for Counselling (BAC), now BACP, defined professional counselling in 1986 as the principle-based use of a relationship to facilitate self-knowledge, emotional acceptance, and the optimal growth and development of personal resources.<sup>203</sup> A specific type of counselling is online counselling, which is suitable for people who are experiencing certain mental difficulties such as stress, confusion, fear, or feelings of loss of control over the situation in their lives. They are aware of these feelings and want to discover their own internal resources and energy to overcome them. On the other hand, online counselling is not suitable for people with severe and long-term, chronic mental illnesses that require the physical presence of a counsellor.

The article discusses the specifics of online counselling that could be beneficial in critical situations not only during the COVID-19 pandemic, but also in the post-COVID era and the benefits and risks of counselling that need to be addressed when working with clients. This article is based on the results of a survey conducted in Italy involving three hundred respondents during the period January 2020 to April 2021 who, as a result of the crisis situations related to the COVID-19 pandemic, became afflicted with alcohol dependence.

200 Jiju Varghese et al., "Certain negative consequences related to the coronavirus pandemic and relevant possible solutions," *Acta Missiologica* 14, no. 1 (2020): 83–91. <https://www.actamissiologica.com>

201 Varghese et al. "Certain negative consequences" 85.

202 WHO, "Mental Health and Psychosocial Considerations during the Outbreak of COVID-19," last modified March 18, 2020, <https://apps.who.int/iris/bitstream/handle/10665/331490/WHO-2019-nCoV-MentalHealth-2020.1-eng.pdf>

203 British Association for Counselling (BAC). *Counselling-definition of terms in use with expansion and rationale* (Information Sheet 1). (Rugby: British Association for Counselling, 1986).

### Specifics of Online Counselling that Are Beneficial in Critical Situations During the COVID-19 Pandemic

Especially during the COVID-19 pandemic, online counselling has quickly become a popular assistance model, mainly for those living in rural or isolated areas, those who were afraid of getting the virus or those who were already infected. It has also become a preferred choice for those who have little time and are well versed in modern technology. This type of distance help is defined in various ways: e-therapy<sup>204</sup>, cybertherapy<sup>205</sup>, online or Internet therapy<sup>206</sup>, e-mail therapy<sup>207</sup>, e-counselling<sup>208</sup>, Internet counselling<sup>209</sup>, cybercounselling<sup>210</sup>, and therap-e-mail<sup>211</sup>. In general, online counselling can be viewed as an ongoing, interactive, electronic communication between a client and a mental health professional<sup>212</sup> in an environment that is not [taking place in person]<sup>213</sup> and is focused on behavioural or mental health improvement.<sup>214</sup> It can be carried out via telephone, asynchronous e-mail, synchronous chat, or videoconferencing<sup>215</sup> and include both asynchronous communication (a delayed response exchange) and synchronous communication, a conversation between participants who immediately receive and respond to each other's exchanges. Videoconferencing and "voice over IP" (i.e. internet telephone) are examples of synchronous internet communication, though currently synchronous internet communication most often takes the form of internet relay chat, commonly known as "online chat", "instant messaging", or "text messaging". The form of online counselling allows the client to communicate their problems and feelings in a confidential and reliable environment. It is conducted through online communication, which suits the clients best and is pleasant for them and it takes place in a safe atmosphere of acceptance and trust that is more confidential than friendship, and perhaps less stigmatising than the helping relationships offered in traditional medical or psychiatric contexts.<sup>216</sup> By establishing such a supportive environment, albeit in the online sphere, it provides clients with an opportunity to work towards living more satisfyingly and

204 M. Manhal-Baugus, "E-therapy: Practical, ethical, and legal issues," *CyberPsychology & Behavior* 4, no. 5 (2001): 551–563.

205 J. Suler, "Psychotherapy in cyberspace: A 5-dimensional model of online and computer-mediated psychotherapy," *CyberPsychology & Behavior* 3, no. 2 (2000): 151–159.

206 A.B. Rochlen, J.S., Zack and C. Speyer, "Online therapy: Review of relevant definitions, debates and current empirical support." *Journal of Clinical Psychology* 60, no. 3 (2004): 269–283.

207 E.E., Shapiro and C.E. Schulman, "Ethical and legal issues in e-mail therapy," *Ethics & Behavior* 6, no. 2 (1996): 107–124.

208 D.F. Tate, E.H. Jackvony and R.R. Wing, "Effects of internet behavioral counselling on weight loss in adults at risk for type 2 diabetes: A randomized trial," *Journal of the American Medical Association* 289, no. 14 (2003): 1833–1836.

209 S.L. Pollock, "Internet counselling and its feasibility for marriage and family counselling," *The Family Journal: Counselling and Therapy for Couples and Families* 14, no. 1 (2006): 65–70.

210 M.F., Maples and Han, S. "Cybercounseling in the United States and South Korea: Implications for counselling college students of the millennial generation and the networked generation," *Journal of Counselling, Development* 86, no. 2, (2008): 178–183.

211 L.J., Murphy and D.L. Mitchell, "When writing helps to heal: E-mail as therapy," *British Journal of Guidance & Counselling* 26, no. 1 (1998): 21–32.

212 J.R. Alleman, "Online counseling: The Internet and mental health treatment," *Psychotherapy: Theory, Research, Practice, Training* 39, no. 2 (2002), 200.

213 M.J. Mallen and D.L. Vogel, "Introduction to the major contribution: Counselling psychology and online counselling," *The Counselling Psychologist* 33, no. 6 (2005), 764.

214 Alleman, "Online counselling," 200.

215 Mallen and Vogel, "Introduction to the major," 764.

216 C., Feltham and W. Dryden, *Dictionary of Counselling* (London: Whurr. 1993).

resourcefully.<sup>217</sup> Talking about their problems with the counsellor through the online form helps clients improve their understanding of their situation and under the guidance of the counsellor, they are able to work on changes that will help improve their lives.<sup>218</sup>

### **Several Benefits and Risks of Online Counselling that Are Also Relevant for the Post-COVID era**

Online counselling offers many possibilities. The following sections summarise some of its specific benefits as well as potential risks:

- Online counseling services can be provided at any time of the day<sup>219</sup> and clients can send messages whenever they feel most in need of, or interested in<sup>220</sup>. Online counseling can be accessed from anywhere in the world having Internet access<sup>221</sup>. It also allows individuals to access counsellors from the comfort of their home. Can take less time away from home or worry about traffic. From the counsellors' perspective, it allows them more flexibility in their work schedules. This also creates an opportunity for the counsellor to extend their services to more clients as appointments can be potentially scheduled over 24 hours and reach a larger geographical region. There are no difficulties in having to schedule an appointed time because the counsellor and client do not have to be sitting at their computers at the same time. The flexibility of electronic communication can also increase a counsellor's accessibility, especially for clients with erratic or demanding personal schedules<sup>222</sup>;

- Online communication is very convenient, especially for young adults or those who often use technology. More and more people are using email, webinars and text messages to communicate during the pandemic, and it may seem more comfortable or easier for them than talking to someone in person, especially when personal or private information is revealed<sup>223</sup>;

- Online counseling overcomes the barriers that can prevent people from seeking counseling. It can also be useful for those who are ambivalent and uncertain about the in-person counselling process, or who are afraid to seek face-to-face counselling<sup>224</sup>;

- Online counseling can be a solution for patients living in remote areas. They don't have to travel great distances (or miss a whole day) every time they have a session. Customers can maintain physical distance more easily, so strongly advised during the pandemic<sup>225</sup>. This approach is also

217 British Association for Counselling (BAC). *Counselling-definition of terms in use with expansion and rationale* (Information Sheet 1). (Rugby: British Association for Counselling, 1986).

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219 Manhal-Baugus, "E-therapy," 551–563.

220 R. Bailey, J. Yager and J. Jenson, "The psychiatrist as clinical computerologist in the treatment of adolescents: Old barks in new bytes," *American Journal of Psychiatry* 159, no. 8 (2002): 1298–1304.

221 Maples and Han, "Cybercounseling," 178–183.

222 M.R. Peterson and R.L. Beck, "E-mail as an adjunctive tool in psychotherapy: Response and responsibility," *American Journal of Psychotherapy* 57, no. 2 (2003): 167–181.

223 J. R. Suler, "The online disinhibition effect," *CyberPsychology & Behavior* 7 no. 3, (2002): 321–326.

224 A. Lange et al., "Intertapy: Treatment of posttraumatic stress via the Internet," *Cognitive Behaviour Therapy* 32, no. 3 (2003): 110–124.

225 Krzysztof Trębski, Cecilia Costa, Mária Šmidová and Mária Nemčíková, "The costs of the COVID-19 pandemic.

ideal for those with a physical condition that limits mobility or does not have adequate means of transport. Some people with COVID-19 disease, chronic illness or disability can greatly benefit from online counseling<sup>226</sup>;

- Working online offers clients advice with numerous advantages in terms of choice of consultants and "meeting" arrangements. Clients can choose an online consultant for reasons completely independent of geographical proximity, such as theoretical orientation or specialization. Those who need to change their residence or who temporarily move to another country can continue their counseling without interruption;

- Online consultancy is economically more convenient because it reduces travel expenses for clients and reduces the cost of using the office for the consultant. This makes online consulting services more accessible financially<sup>227</sup>;

- Prison inmates who for security reasons, and also for public health reasons (in fact, the various prison districts can become COVID 19 clusters) cannot make use of face to face therapy can have access to online counseling and take advantage of this type of support<sup>228</sup>;

- Online counselling may also be effective in eliminating social stigma associated with receiving therapy. For those who are uncomfortable with receiving face-to-face therapy, online counselling allows access to such services in private without having to visit the counselling centre. Counselling can take on a whole different image when executed by the client in their own home through the computer<sup>229</sup>. It may also allow the client to feel less stigmatised without having to be seen by others in the waiting room, the administrative staff or any other person. Online counselling offers an unusual level of privacy<sup>230</sup>. The anonymity of online counselling may also ease the discomfort and potentially embarrassing disclosure of behaviours and thoughts. It may be especially important for individuals with issues of shame or fear and also for those who are afraid of being judged<sup>231</sup>;

- Online counseling ensures flexibility with scheduling, as everything is done online, clients can schedule sessions that fit your life. They can plan therapy based on their work schedule, family obligations, or caring for a loved one. Convenience and flexibility are ideal for making therapy a comfortable part of clients' routine;

The italian perspective," *Acta Missiologica* 14, no. 2 (2020): 127–136.

226 Krzysztof Trębski, "Online counselling: opportunities and challenges," *Charity, Philanthropy and Social Work* 2, (2017): 7–23.

227 M. Griffiths, "Online therapy: A cause for concern?" *The Psychologist: Bulletin of the British Psychological Society* 14, no. 5 (2001): 244–248.

228 M. Liebrez et al., "Caring for persons in detention suffering with mental illness during the Covid-19 outbreak," *Forensic Science International: Mind and Law* 1, (2020), <https://doi.org/10.1016/j.fsml.2020.100013>

229 G. E. Cohen and B. A. Kerr, "Computer-mediated counselling: An empirical study of a new mental health treatment," *Computers in Human Services* 15, no. 4, (1998): 13–26.

230 S. Chakrabarti, "Usefulness of telepsychiatry: A critical evaluation of videoconferencing-based approaches," *World Journal of Psychiatry* 5, no. 3 (2015): 286–304.

231 M. Fenichel, et al., "Myths and realities of online clinical work," *CyberPsychology, Behavior*, 5, (2002): 481–497.

- Individual counseling carried out over the Internet may include asynchronous communication method where a message is placed in a message queue and does not require an immediate response to move forward with processing (examples include e-mail and SMS messaging), which provides both client and counsellor the opportunity to reflect on thoughts, feelings and other reactions to the other person's words. For most people, typing is harder and more time-consuming than speaking, but it is valuable because it "slows down thoughts" and helps to define them well. Writing can also reduce the emotional burden on patients by enabling them to say whatever they want to say. Yager further explains: "Computers benignly and approvingly accept whatever patients care to reveal without interrupting them, including all confessions, admonitions, quirky ideas, and other communications"<sup>232</sup>. Some clients find it easier to express lengthy or complex ideas or feelings via email, knowing that they have time to "finish the thought" before eliciting another person's reaction to the initial parts of what they have expressed. E-mail contact can allow clients to raise issues they may have forgotten during a session or were reluctant to raise in person<sup>233</sup>. The act of writing about one's experiences can itself be therapeutic, and the exchange of emails with a counsellor creates an automatic transcript of all sessions<sup>234</sup>. It gives clients the ability to re-read e-mails to look for approaches that they have used to overcome previous problems and to review positive and encouraging comments that their counsellor has made about them<sup>235</sup>. It can be used to remind both clients and consultants of things they had previously expressed<sup>236</sup>, to allow both to fully reflect on the issues discussed in previous correspondence<sup>237</sup>.

Even though the delivery of technology-based counseling continues to grow, questions and critiques of distance online counseling seem to increase<sup>238</sup>. For this reason, it is important to remember some drawbacks of online counseling:

- Traditional counselling is largely based on the characteristics of both verbal and non-verbal cues as a form of communication. These are considered essential to assess what the client feels and to identify discrepancies or inconsistencies between verbal and non-verbal behaviours<sup>239</sup>. Online counselling does not give an indication of characteristics such as voice tone, facial expression, body language and eye contact<sup>240</sup>. This can potentially impact negatively on the counselling outcomes as the counsellor has no opportunity to observe and interpret such cues;

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- 232 J. Yager, "E-mail as a therapeutic adjunct in the outpatient treatment of anorexia nervosa: Illustrative case material and discussion of the issues," *International Journal of Eating Disorders* 29, no. 2 (2001): 135.
- 233 M.M. Maheu, "The online clinical practice management model," *Psychotherapy: Theory, Research, Practice, Training* 40, no. 1/2 (2003): 20–32.
- 234 S.L. Pollock, "Internet counselling and its feasibility for marriage and family counselling," *The Family Journal: Counselling and Therapy for Couples and Families* 14, no. 1 (2006): 65–70.
- 235 L.J. Murphy and D.L. Mitchell, "When writing helps to heal: E-mail as therapy," *British Journal of Guidance & Counselling* 26, no. 1 (1998): 21–32.
- 236 A. Barak, "Psychological applications on the Internet: A discipline on the threshold of a new millennium," *Applied & Preventive Psychology* 8, no. 4, (1999): 231–245.
- 237 J.A. Oravec, "Online counselling and the internet: Perspectives for mental health care supervision and education," *Journal of Mental Health* 9, no. 2 (2000): 121–135.
- 238 J.V. Laszlo, G. Esterman and S. Zabko, "Therapy over the Internet? Theory, research & finances," *CyberPsychology & Behavior* 2, no. 4 (1999): 293–307.
- 239 P. C. Abney and D. Cleborne, "Counseling and technology: Some thoughts about the controversy," *Journal of Technology in Human Services* 22, no. 3 (2004): 1–24.
- 240 M.P. McCrickard and L.T. Butler, "Cybercounseling: A new modality for counselling training and practice. *International Journal for the Advancement of Counselling* 27, no. 1 (2005): 101–110.

- The lack of visual cues (for example in the counselling by telephone) is also particularly important for clients who wish to discuss a visible physical disability and want their counsellor to be able to see exactly what they are talking about. Moreover, the lack of a physical presence of another person in the same room can make some people less intimate and less comforted in moments when they express their greatest difficulties because that "increasing human connectedness is a key ingredient of healing, and online counselling is to condone the separateness between people that many therapeutic interventions are aimed at repairing"<sup>241</sup>;

- The absence of the structure which fixed appointments provide can be a disadvantage for some clients. Many of them prefer the structure of "having" to attend a session at the same time every week;

- Other potential drawbacks of online counselling are that unskilled individuals can take advantage of vulnerable people. Unfortunately, "counsellor" is not a legally protected word in most countries, which means that anyone can claim to be a counsellor and offer services that may appear to be therapy. It may not always be easy to know that the client is receiving evidence-based counselling. In fact, in many countries counsellors have gathered in various associations that do not always communicate with each other and often there is no single national list of professional counsellors that can be consulted by potential clients. It would be important that licensing laws protect clients and ensure that only those who are trained and qualified to practice receive a license;

- Relying on computers as a communications medium can bring technology into the foreground of the counselling process. Ideally, technology simply acts as a communication tool; however, even the best technological tools sometimes require attention, and can be frustrating if this occurs during an exchange of advice. Hardware or software failure or internet service failure can impact the online availability of both counsellor and client<sup>242</sup>;

- The ability of online counselling to develop a positive and effective therapeutic alliance has been questioned<sup>243</sup> because the ways in which counsellors form a therapeutic bond have a different effect in an online environment than in a face-to-face environment;

- For the client can be frustrating to have to wait for the counsellor answer when using e-mail and other forms of asynchronous communication (which means that two people write at different times instead of conversing in real time). In a similar vein, the inevitable time delay associated with email exchanges precludes the kind of urgent attention (or even emergency response) which is possible in a face-to-face setting;

- Online counsellors should have the ability to order quickly, compose expressively and be proficient in online communication, encryption and web browser administration. Online counselling requires from counsellors the dexterity and creativity in their actions, which they have not always been able to develop during traditional counseling<sup>244</sup>;

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- 241 M. Rosenfield, *Counselling by Telephone* (London: Sage, 2000). 279.
- 242 K. D. Baker and M. Ray "Online counseling: The good, the bad, and the possibilities," *Counselling Psychology Quarterly* 24, no. 4 (2011): 341–346.
- 243 J. E. Barnett, "Online counseling: New entity, new challenges," *Counseling Psychologist* 33, no. 6 (2005): 872–880.
- 244 A. Barak, B. Klein and J. G. Proudfoot, "Defining internet-supported therapeutic interventions," *Annals of Be-*

- With online therapy the security of the client's records and information could be jeopardised and confidentiality is at greater risk of being inappropriately breached given the written nature of the medium. Counsellors will have to continuously upgrade their technology to prevent security breaches<sup>245</sup>. The fact that using a computer at work, in an internet café or in a public library, or in any other environment in which other people have access to the same equipment, also introduces particular dangers for privacy in the e-mail counseling;

- The lack of face-to-face interaction could increase the risk of misdiagnosis by the counsellors and therapists<sup>246</sup>. For this reason, online therapy is currently deemed inappropriate for diagnosis of clinical issues such as suicidal or homicidal feelings, chronic depression and psychotic, those who presently experiencing a severe crisis which is impinging upon their overall functioning. In these situations, counsellors must be on-site to observe the client in person and evaluate the degree of risk and the best continuing course of action;

- Online counseling raises concerns about legal and ethical issues. Considering the legal aspects of counseling and respective territorial jurisdiction, many online consultants offer e-mail advice only to clients over the age of 18. Of course, the client should be made aware of the potential risks of receiving online mental health services. For example, the potential risks of email can include failure to receive messages and breach of confidentiality. Emails may not be received if they are sent to the wrong address (which may also violate confidentiality) or if they simply may not be noticed by the consultant. Confidentiality could be breached in transit by hackers or Internet Service Providers or, in extreme cases, by others with access to your email account or computer. Additional safeguards should be considered when the computer is shared by family members or others who have access to the same device<sup>247</sup>;

- Online therapy can pose a greater security risk than in-person sessions. Someone could hack the client's or consultant's computer or plug into the wifi connection. Since what is revealed during the meeting can be very sensitive, both the client and the counsellor must be aware of the significant privacy risks;

- Online consultants should avoid forming "dual relationships" (i.e., those which are simultaneously counseling relationships and something else) both in face-to-face and internet-based work, so they should not work as counsellors with friends or family;

- It is important to bear in mind that online counsellors should avoid forming "dual relationships" (i.e. those that are both consulting relationships and something else) both in face-to-face work and internet-based work. For this reason, even during a COVID-19 emergency, they should not work as a counsellors with friends or family.

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*havioral Medicine* 38, no. 1 (2009): 4–17.

245 M. O. Dunaway, "Assessing the Potential of Online Psychotherapy," *Psychiatric Times* 17, no. 10 (2000): 1–9.

246 P.R. Recupero and S.E. Rainey, "Informed Consent to E-Therapy," *American Journal of Psychotherapy* 59, no. 4 (2005): 319–331.

247 ISMHO (International Society for Mental Health Online), "Suggested principles for the online provision of mental health services," last modified January 9, 2000, <https://ismho.org/resources/archive/suggested-principles-for-the-online-provision-of-mental-health-services/>

### **Methods and results**

The survey was conducted in Italy involving three hundred respondents during the period January 2020 to April 2021 who, due to the crisis situations related to the COVID-19 pandemic, became afflicted with alcohol dependence. The aim of the survey was to point out the benefits of the unique strategies that online counselling can provide to a group of respondents affected with such a problem. The respondents were contacted by the author of the survey through the hospitals in which the author of the survey had been working professionally as a counsellor for a long time, and then in person, via telephone or through various mobile applications. The condition for entering the survey was the age of the respondents (from 35 to 60 years), psychological problems related to the COVID-19 pandemic and its consequences, the occurrence of alcohol dependence during the pandemic, the emergence of problems related to alcohol dependence, job loss, economic uncertainty, relationship problems, problems with maintaining relationships within the nuclear family as well as extended family, and many other related difficulties. The survey was conducted on the basis of qualitative research strategies and the tool was an in-depth online dialogue.

The results of the survey showed that the respondents felt lonely, separated from their family, they had feelings of guilt, despair, anger and they felt that they had failed and ruined everything, that they had lost everything and had nowhere to turn to because they had destroyed all their relationships and lost the trust of their family, loved ones and friends. They felt unable to find their place in life, and they longed for everything to be the same as it had been before the pandemic and before their addiction.

The aim of the online interviews was to make the respondents aware of the symptoms of their estrangement and to provide them with help by motivating them, which is necessary in order to change their situation. The author of the survey, and at the same time the counsellor during the online interviews, worked with the potential of accepting each individual respondent. He attuned himself internally to their thoughts and mental states, made them aware of the prospect of hope, reassured them of their dignity and ability to establish relationships with the people in their surroundings, and helped them to enter a therapeutic community which has clearly defined rules of conduct that must be respected by all members. He helped them to restore the right hierarchy of values, stimulated their will to heal and supported their gradual reintegration into society. Through online counselling they were repeatedly instructed to focus on hope, on the possibility of change, and on the fact that they are capable of achieving this change in order to begin their new life journey.

### **Discussion**

The implementation of online counselling with this group of respondents was quite demanding. It required great skill in understanding the life situations of the respondents and in identifying their dilemmas, feelings of concern and insecurity. The respondents often fell into depression, stating that they could not move forward as they wished; they often deliberately wallowed in feelings of fear and isolation so as not to accidentally fall back into addiction, if they, for example, started working in a new job. These repetitive and cyclical states only strengthened their feelings of helplessness and emptiness. A positive factor was the fact that the respondents were willing to work on themselves despite these mental states. A repeated series of online dialogues throughout the survey gradually helped the respondents to become aware of their own personal resources and abilities. Their psychological functions and also personal communication skills improved. After the completion of the survey, there was a noticeable positive shift in their interest in recovery, to start living a new life, re-entering the work force and gradually growing as people. Through online dialogues with the author of the survey/the counsellor, the respondents also had

the opportunity to experience affirmation and recognition of their values and dignity, while also promoting their autonomy and the worthiness of their existence.

### Conclusion

The COVID-19 pandemic, as well as the post-COVID era, is unprecedented and affects contemporary society and the world in many different ways. Everything from health services to supermarkets, to workplaces, schools and cultural institutions, has been affected. Furthermore, with physical distancing and self-isolation measures in place, it is not surprising that the COVID-19 epidemic had an effect on the physical and mental well-being of many, especially the most vulnerable. Online counselling provides a valid answer to the needs of many people who wish to find psychological support to face the difficulties related to the COVID-19 epidemic and represents a valid alternative to face-to-face therapy, not always possible due to health constraints.

The article discusses the specifics of online counselling that could be beneficial in critical situations not only during the COVID-19 pandemic, but also in the post-COVID era, and the benefits and risks of counselling that need to be addressed in working with clients. With regard to the provision of online counselling it is also necessary to realize that the post-COVID era opens new challenges for the field of online counselling in directing this form of assistance so as to maintain its uniqueness and protecting it from the risks that are associated with virtual reality. The given analysis can be the basis for a series of new research approaches, which will be more precisely specified for the benefits of online counselling in specific areas that are and will continue to be relevant in the post-COVID era.

### AUTHOR CONTRIBUTIONS

The mentioned author significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

The author declares that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, the author declares that there is no conflict of interest related to this article or its review.

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## ANALYSIS OF MOTIVATION TO WEAR FACE MASKS IN THE SARS-COV-2 PANDEMIC RELEVANT ALSO FOR THE POST-COVID ERA



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### Abstract

**Background:** Objective of the research was to analyse the perception of face masks in the first period of the SARS-CoV-2 pandemic and impact of information about efficiency of wearing masks spread on the internet and in media, including motivational factors and examined reactions to messages promoting the use of face masks against COVID-19.

**Methods:** The data-gathering process was held between March and April 2020, involving slovak inhabitants working in public and private sector at age of 30-55 years old as well as we set the sample criteria such as age, gender, job position and education. Data were collected by questionnaire including three main dimensions: 1. Impact of published offline/online messages about face masks on behavioural attitudes of the people, 2. Impact of existing strategies from the public health authorities, 3. Personal protective behaviours vs. personal motivational factors to wear masks, 4. Focuses on adherence to behaviours required to reduce virus transmission. 5. Perception of purpose of the respiratory masks and the data were analysed using the SPSS.

**Results:** There is significance between information about masks, willingness to wear face masks and follow government restrictions due the coronavirus pandemic. Refusal to wear masks included physical discomfort, confusion or misinformation, low perceived susceptibility to COVID-19, and perceptions of losing identity or autonomy due governmental restrictions. The motivational factors are in relation with the perception of self-protection, protection of others and social norms in society. At the beginning of the pandemic in March 2020 in Slovakia, the most of the people used home-made masks (35.91%) or surgical masks (39.66%) mostly due to lack of the respirators, even in the second wave of pandemic we can see people preferred colourful home-made masks or medical masks to respirators that are less comfortable (24.43%) and the motivation has been changed.

**Conclusion:** There is need to know motivational factors and aspect of human behaviour to eliminate transmission of virus that causes COVID-19, and changing behaviour is crucial to preventing the increased number of Covid-19 cases. The goal is to develop resilience and new patterns of behaviour in preparation for future pandemics.

**Keywords:** COVID-19 – Wearing mask – Protection SARS-CoV-2 – Post-COVID era.

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### Introduction

The COVID-19 pandemic in Slovakia is of the worldwide pandemic of coronavirus disease 2019 caused by severe acute respiratory syndrome coronavirus (SARS-CoV-2). Experimental and epidemiological data analysed the impact of wearing face masks to reduce the spread of SARS-CoV-2 and confirmed the relationship between source control and personal protection. In Slovakia, the virus was confirmed to have spread on 6 March 2020 when first restrictions were held, two weeks later wearing masks was compulsory. The most of Slovak inhabitants started to wear masks at the very beginning of pandemic in March 2020 before the official campaign was held. The local pharmacies have introduced a rule: one face masks per citizen due to lack of protective equipment in Slovakia, so people in community started to sell a home-made mask as a reaction to this situation. In March 2020 at time of first wave of COVID-19, there were different types of face masks from home-made to FFP respirators, especially seniors, disabled and Roma people had a problem to buy one, so people did not look at the level of its protection so much. Mask-wearing practises and their efficiency have been a source of researches all over the world and there are different attitudes and opinions among healthcare workers and the general public in Slovakia whether face mask protect you against the COVID-19 pandemic.

### Efficiency of wearing masks

At the time of COVID-19 pandemic there are available two common types of masks: surgical masks and filtering face piece (FFP) respirators. Surgical masks comprise of three layers: an inner soft absorbent layer, a middle polypropylene barrier and an outer hydrophobic fabric. Proper use of surgical masks, with moulding to the user's nasal bridge, can as a barrier to infectious droplets (>5 µm), and offer a sixfold exposure reduction.<sup>249</sup>

Respirators, on the other hand, provide additional benefit to surgical masks by containing a mechanical filter, which can remove airborne contaminants through interception. There are three categories of FFP in Europe: FFP1, FFP2 and FFP3 (FFP3 respirators provide 99% efficiency in filtering particles sized from 100 to 5000 nm, including airborne small droplets).<sup>250</sup>

The most of the existing evidence on the filtering efficacy of face masks and respirators comes from in vitro experiments with nonbiological particles,<sup>251</sup> which may not be generalizable to infectious respiratory virus droplets. Some of them are concentrated on the influenza.<sup>252</sup> Surgical masks can efficaciously reduce the emission of influenza virus particles into the environment in respiratory droplets, but not in aerosols.<sup>253</sup>

249 J. Gawn et al., Evaluating the protection afforded by surgical masks against influenza bioaerosols: gross protection of surgical masks compared to filtering facepiece respirators. Buxton: Health and Safety Executive; 2008. 33. Report no. 1.

250 H. Naveed et al., Controversies regarding mask usage in ophthalmic units in the United Kingdom during the COVID-19 pandemic, *Eye* 34, (2020): 1172–1174, <https://doi.org/10.1038/s41433-020-0892-2>

251 R. B. Patel et al., Respiratory source control using a surgical mask: an in vitro study, *J. Occup. Environ. Hyg.* 13, (2016): 569–576.

252 NHL Leung et al., Respiratory virus shedding in exhaled breath and efficacy of face masks, *Nat Med.* May 26, no. 5 (2020): 676–680, doi: 10.1038/s41591-020-0843-2

253 D. K. Milton et al., Influenza virus aerosols in human exhaled breath: particle size, culturability, and effect of surgical masks, *PLoS Pathog* 9, (2013): e1003205

In 2008 there is systematic review of face masks in influenza epidemics, which included standard surgical masks and respirator masks and found some efficacy of masks if worn by those with respiratory symptoms but not if worn by asymptomatic individuals.<sup>254</sup>

Leung, Chu D, Shiu et al. (2020)<sup>255</sup> demonstrated the efficacy of surgical masks to reduce coronavirus detection and viral copies in large respiratory droplets and in aerosols. This has important implications for control of COVID-19, suggesting that surgical face masks could be used by ill people to reduce onward transmission.

From 2020 we can find, systematic reviews comparing standard surgical masks and respirator masks, which included a single small trial from 2009 of respirator masks, standard masks, and no masks among the general public during an influenza epidemic in Australia.<sup>256</sup> Masks were worn less than 50% of the time and the study did not show significant differences - no benefit of respirator masks over standard ones.<sup>257</sup>

Marasinghe et al. (2020)<sup>258</sup> reported that they “did not find any studies that investigated the effectiveness of face mask use in limiting the spread of COVID-19 among those who are not medically diagnosed with COVID-19 to support current public health recommendations”. Howard et al. (2020)<sup>259</sup> is one that analysed “exhaled breath and coughs of children and adults with acute respiratory illness”<sup>260</sup>, i.e. used a clinical setting.

Mitze et al. study (2020)<sup>261</sup> argues that a region's demographic structure, such as the overall population density and age structure, its basic health care system, including the regional endowment with physicians and pharmacies per population, are important factors for characterizing the local context of COVID-19.

Face masks may have made a particular difference in the spread of COVID-19, particularly in larger cities with higher population density and accordingly higher intensity of social interaction. Over a period of 10 days, we observe an average reduction of 12.3 cases between treated and control regions. Relative to the average number of cumulative COVID-19 cases on May 1 in control regions (295.6), this amounts to a reduction of 4.2% of cases.<sup>262</sup>

For reducing infection rates, the estimates of cluster-RCTs were in favour of wearing face masks vs. no mask, but not at statistically significant levels (adjusted OR 0.90, 95% CI 0.78-

254 B.J. Cowling et al., Face masks to prevent transmission of influenza virus: a systematic review, *Epidemiol Infect* 138, (2010): 449–56, doi:10.1017/S0950268809991658 pmid:20092668

255 Leung et al., Respiratory virus shedding, 676–680.

256 CR MacIntyre et al., Face mask use and control of respiratory virus transmission in households, *Emerg Infect Dis* 15, (2009): 233–41, doi:10.3201/eid1502.081166 pmid:19193267

257 T. Greenhalgh et al., Face masks for the public during the covid-19 crisis, *BMJ* (2020): 369:m1435. <https://doi.org/10.1136/bmj.m1435>

258 KM. Marasinghe et al., A systematic review investigating the effectiveness of face mask use in limiting the spread of COVID-19 among medically not diagnosed individuals: shedding light on current recommendations provided to individuals not medically diagnosed with covid-19. Version 2. Research Square 2020.[Preprint.] doi:10.21203/rs.3.rs-16701/v2. <https://www.researchsquare.com/article/rs-16701/v2>.

259 J. Howard et al., Face Masks Against COVID-19: An Evidence Review, Preprints 2020, 2020040203. <https://www.doi.org/10.20944/preprints202004.0203.v1>

260 Leung et al., Respiratory virus shedding, 676.

261 T. Mitze et al., Face Masks Considerably Reduce COVID-19 Cases in Germany: A Synthetic Control Method Approach. IZA – Institute of Labor Economics (Germany);2020.ISSN: 2365-9793, DP No. 13319. <http://ftp.iza.org/dp13319.pdf>

262 Mitze et al., Face Masks Considerably, 2365–9793.

1.05). Levels of mask filtration efficiency were heterogeneous, depending on the materials used (surgical mask: 45–97%). One laboratory study suggested a viral load reduction of 0.25 (95% CI 0.09–0.67) in favour of mask vs. no mask.<sup>263</sup>

In Germany, the daily growth rates in the number of infections when face masks were introduced was around 2 to 3%. These are very low growth rates compared to the early days of the epidemic in Germany, where daily growth rates also lay above 50%.<sup>264</sup>

The similar situation was in the Slovakia at the beginning of the pandemic. Now it seems as it is hard to prevent as the number of covid case has been increasing rapidly (2630 people infected per day and tested by PCR in January 2021; 1717 moving median 7 days) German study has ignored spatial dependencies in the epidemic diffusion of COVID-19, it can play important role. There are various types of face masks and different climatic conditions and educational awareness of health in the regions that might have a impact on the spread of COVID-19.<sup>265</sup>

If individuals are not wearing a face mask, the risk of spreading the infection through coughing or sneezing out droplets is higher. On the other hand, if healthy individuals in close proximity are not wearing face masks, they may be at a higher risk of contracting COVID-19 through respiratory droplets. This kind of transmission is not rare especially in public transit during rush hour in any part of the world.<sup>266</sup>

In Slovakia, during a situation where the public is at risk of a real or potential health threat, there might be better and understandable campaigns explaining the state as the vulnerable groups from the local Roma settlements accept and understand them as a prevention, not prohibition. In 8 March 2020, the local authorities make their own initiatives to make positive impact on the willingness of people to protect themselves by wearing different types of masks, later on there were public campaigns requiring it. The spontaneous campaign from people and local authorities spread the message: wearing a mask is not a shame.

Currently, there is no known effective approach to prevent such type of transmission to healthy individuals other than to assume that asymptomatic, pre-symptomatic or symptomatic individuals who have not yet been medically diagnosed follow recommended precautionary methods such as hand hygiene, cough and sneeze etiquette, and wearing the face masks.<sup>267</sup>

Daoud, Hall et al. (2021)<sup>268</sup> included studies examining the efficacy and/or effectiveness of cloth masks in filtering bacteria or viruses or comparing a cloth mask to an industrial medical or surgical mask. The use of multiple layers increased the viral filtration efficacy of cloth mask material. Both types of mask, polyester alone and combined with paper towel, blocked ~95% of viral particles similar in size to SARS-CoV-2, as detected by PCR. However, the authors of the study considered this insufficient protection for health care clinicians and suggested use of N95 respirators.<sup>269</sup>

263 D. Coclite et al., Face Mask Use in the Community for Reducing the Spread of COVID-19: A Systematic Review. *Front Med (Lausanne)*. 2021 Jan 12;7:594269. doi: 10.3389/fmed.2020.594269. PMID: 33511141; PMCID: PMC7835129.

264 K. Wälde, Corona-Blog, Einschätzung vom Freitag, 20. März 2020, <https://www.macro.economics.uni-mainz.de/2020/03/20/einschatzung-vom-freitag-20-marz/>

265 Mitze et al., Face Masks Considerably, 2365–9793.

266 WHO, Coronavirus Disease 2019 (COVID-19): Situation Report-46. (2020). <https://www.who.int/emergencies/diseases/novel-coronavirus-2019/situation-reports>

267 Marasinghe et al., A systematic review investigating the effectiveness of face mask,

268 AK, Daoud et al., The Potential for Cloth Masks to Protect Health Care Clinicians From SARS-CoV-2: A Rapid Review, *The Annals of Family Medicine* 19, no. 1 (January 2021): 55–62, DOI: <https://doi.org/10.1370/afm.2640>

269 QX. Ma et al., Potential utilities of mask-wearing and instant hand hygiene for fighting SARS-CoV-2, *J Med Virol*. 92, no. 9 (2020):1567–1571.

The qualitative synthesis suggested that cloth materials provide a measurable level of particle filtration. On this basis alone, cloth masks are superior to complete lack of face protection. However, this cannot serve as reassurance of sufficient protection for health care clinicians. The level of filtration provided is highly variable and consistently inferior to standard medical masks.<sup>270</sup>

Although multiple studies indicated that cloth masks might be somewhat efficacious, the single clinical investigation suggests that they provide inferior protection in clinical settings and might even increase risk to health care clinicians. Whereas that work suggested that clinicians should exercise caution when choosing to use cloth masks, as no investigations as to why cloth masks might have increased risk of viral infection. Although they considered poor filtration, moisture retention, ineffective cleaning, and reuse of cloth masks as possible contributors, 80% of cloth mask wearers washed their masks at home with soap and water rather than in hospital-grade laundry.<sup>271</sup>

The Centers for Disease Control and Prevention (CDC) recommends that during crisis situations, N95 respirator masks be used only during aerosol-generating procedures, but that means risking exposure of health care workers using less protective surgical masks around patients with confirmed or suspected Covid-19 infection. Additional guidelines from the CDC include reusing masks and respirators intended for one-time use and, if stocks are fully depleted, using scarves or bandanas. The evidence to support these recommendations is thin.<sup>272</sup> The similar situation was in Slovakia at first wave of COVID-19 there were no enough protective equipment for medical staff.

Some recommendations emphasize that other precautionary methods are more important than wearing a face mask while some suggest face masks are only effective in combination with other precautionary practices.<sup>273</sup>

The behavioural sciences seek to understand the psychological, biological, social and environmental factors that influence behaviour with a view to developing interventions and policies to help achieve societal, organisational or personal goals to reduce virus transmission and to develop resilience and new patterns of behaviour in preparation for future pandemics.

Face masks have become a clothing accessory that is worn every day and everywhere. A variety of shapes, forms, and materials are being used and advertised to the point that in 2020 the business of producing and selling face masks was born.<sup>274</sup>

From 6 March 2020, it is mandatory to wear respiratory masks covering mouth and nose as an effective strategy to reduce spread of SARS-CoV-2 infections in Slovakia. Due this reason, the research study is focused on the perception of importance of respiratory masks, analysis of personal protective behaviour and motivational factors to wear masks to protect against COVID-19.

270 Daoud et al., The Potential for Cloth Masks, 55–62.

271 CR. MacIntyre et al., A cluster randomised trial of cloth masks compared with medical masks in healthcare workers, *BMJ Open* 5, no. 4 (2015): e006577

272 ML. Ranney et al., Critical supply shortages - the need for ventilators and personal protective equipment during the Covid-19 pandemic, *N Engl J Med* 382, no. 18 (2020): e41

273 M. Abedi, Demand for face masks on the rise amid coronavirus outbreak - but are they effective? *Global News*. 2020. <https://globalnews.ca/news/6451929/coronavirus-china-face-masks/>

274 C. Matuschek et al., Face masks: benefits and risks during the COVID-19 crisis, *Eur J Med Res* 25, no. 32 (2020), <https://doi.org/10.1186/s40001-020-00430-5>

**Methods**

The research study aim is to analyse the attitudes of public to wearing face masks to reduce the spread of SARS-CoV-2 in these dimensions:

- 1, Impact of published offline/online messages about face masks on behavioural attitudes of the people
- 2, Impact of existing strategies from the public health authorities
- 3, Personal protective behaviours vs. personal motivational factors to wear masks
- 4, Focuses on adherence to behaviours required to reduce virus transmission.
- 5, Perception of purpose of the respiratory masks

The research study aim is to analyse impact of the spread messages about importance of face masks on the human being behavioural attitudes, to identify personal protective behaviour and motivational factors to wear or refuse the face masks and to map other factors that make an impact on reducing virus transmission.

The data-gathering process was held between March-April 2020, refers the staff at Slovak public services. The data collection was done via the email contained a letter of introduction outlining the research's social value and its ethical criteria (voluntary participation and confidential treatment of data). The data were analysed using the SPSS (v.18) statistical package. Based on an initial descriptive analysis of the variables' characteristics, we have proceeded to study the relationship between them, using the Spearman correlation coefficient for measuring ordinal variables and the chi-squared statistic when the aim has been to study the relationship between categorical and nominal variables.

The research hypothesis includes domains to analyse the research subject:

**Hypothesis 1: There is correlation between the public information/messages about face masks and gender attitudes to them.**

**Hypothesis 2: There is different perception of government measures against the spread of COVID-19.**

**Hypothesis 3: There are different factors influencing acceptance/refusal to wear the face mask.**

**Hypothesis 4: Personal protective behaviour is connected with the understanding of the purpose of the respiratory masks.**

**Sample**

In a total sample of 532 participants, 51.88% were women and 48.12% were men. The age structure was divided into three categories from 30 to 55 years old. 39.47% achieved secondary education, 30.82% got bachelor degree and 33.08% had a master degree. 39.85% respondents reported wearing masks the most of the time and 35.71% used masks only if it is mandatory and when they leave the public place, they did not use them anymore. 20.11% of the respondents used masks sometimes and 4.32% never used the masks to protect against COVID-19. At the beginning the most of the respondents used home-made masks (35.91%) or surgical masks (39.66%) mostly due to lack of the respirators, even in the second wave of pandemic we can see people preferred colourful home-made masks or medical masks to respirators that are less comfortable (24.43%) and the motivation has been changed (Table1).

**Table 1. The characteristics of the sample**

Demographic characteristics		N	%
Gender	Female	276	51.88
	Male	256	48.12
Age	30-44 years old	191	35.90
	45-50 years old	181	34.02
	51-55 years old	154	28.95
Education	Secondary education	210	39.47
	Bachelor degree	164	30.83
	Master degree	158	29.70
Working place	Public sector	196	36.84
	Corporate sector	160	30.07
	Non-profit sector	176	33.08
Social status	Married	281	52.82
	Single	144	27.07
	Divorced	107	20.11
Wearing masks at first wave of Covid-19 pandemic	Only at mandatory time and places	190	35.71
	The most of the time	212	39.85
	Sometimes	107	20.11
	Never	23	4.32
Type of face masks	Home-made masks	191	35.91
	Medical/surgical masks	211	39.66
	Respirators	130	24.43

**Results**

We analysed the impact of the public messages sharing about the face masks on the basis of the statements, the sample used scale 1-4 to point out if they totally agree or absolutely disagree with the positive and negative aspect of the wearing masks and their purpose.

The level of significance has shown (p=0.046) people believe that any type of masks can protect them. On the other hand, wearing masks should be mandatory, otherwise people are not wearing masks properly (p=0.040). Respondents agreed with the statement: It is essential to wear the mask correctly. It must fit airtight to the skin, otherwise its effect is lost. Doffing of the mask needs to be properly done as well (p=0.014).

Breathing dampens the mask so the mask is losing the protective effect (p=0.017). 35.33% of women and 40.03% of men agreed that masks give a false sense of security (p=0.032).

**Table 2. Dimension 1: Impact of messages about face masks**

Gender	Women	Women	Men	Men	Chi-test
Statements	Agree	Disagree	Agree	Disagree	P
The precautionary principle states we should sometimes act and protect ourselves without definitive evidence about purpose of the masks	35.33	16.54	18.42	29.70	0.038
Whether masks will reduce transmission of covid-19 in the general public is contested	21.61	30.26	22.18	25.94	0.124
Even limited protection could prevent some transmission of covid-19 and save lives	31.01	20.86	20.49	27.63	0.106
Covid-19 is such a serious threat, wearing masks in public should be mandatory	36.27	15.60	18.79	29.32	0.040
Any type of masks (even those made at home) is better than nothing to protect Covid-19.	34.58	17.29	17.85	30.26	0.043
Masks give a false sense of security. The main role of MNC is the protection of people standing nearby. MNC do not protect the wearer.	35.33	16.54	40.03	8.08	0.032
It is essential to wear the mask correctly. It must fit airtight to the skin, otherwise its effect is lost. Doffing of the mask needs to be properly done as well.	38.90	12.97	37.21	10.90	0.014
Breathing dampens the mask. Therefore, air is inhaled and exhaled unfiltered around the edges, losing the protective effect.	39.66	12.21	37.60	10.52	0.017
Producing millions of masks increased number of negative impacts on the climate changing and environment.	27.63	24.25	26.69	21.42	0.205

**Hypothesis 1: There is correlation between the public information / messages about face masks and gender attitudes to them.**

The significance  $p=0.027$  has shown there is relation between impact public information about face masks and attitudes of woman and men to them.

Rather, 35.33% of women thought that we should act intuitively without having direct evidence of the usefulness of masks if we are to protect ourselves. 29.70% of men, on the other hand, disagreed with this statement and 18.42% think that the usefulness of masks should be substantiated ( $p=0.038$ ).

22.18% of men and 21.61% of women agreed with the statement whether masks will reduce the transmission of covid-19 in the general public is challenged and they have doubts about the sufficient protection of face masks (0.124). However, most respondents believe that the mask will protect them.

In the first wave of the COVID-19 pandemic at the beginning of March 2020, in Slovakia there were lack of the surgical masks and respirators, so messages started to be spread into the public: Even limited protection could prevent some transmission of covid-19 and save lives ( $p=0.106$ ). This message made a great impact people started to search for any type of masks to wear to protect themselves massively. Who could not buy mask, began to sew their own home-made masks. Sewing masks became community activity when woman saw masks for free for the vulnerable people, especially seniors, Roma people and alone homeless people and became a good business to be sold. Later on, you could see different types of masks from very different materials from old t-shirt, sleeping sheets to professional respiratory. Together with the it, the message: Any type of masks (even those made at home) is better than nothing to protect COVID-19" spread fast with the slogan "wearing mask is not a shame". Both gender, especially woman started to produce home-made mask to support belief that any type of mask can protect you, if you do not have medical one, also the public authorities supported this message. 34.58% of women and 17.85% of men agreed with this statement ( $p=0.043$ ).

COVID-19 is such a serious threat, wearing masks in public should be mandatory: this message divided population on the both sides ( $p=0.040$ , (differences confirmed between men and women). One group agreed with the wearing masks to be obligatory and another people to protect population and another people were indifferent to wearing veils, they did not wear them at all, or incorrectly, under their noses, only at the entrance to a public building, when no one saw them, they put the veil down According to WHO, masks should be used as part of a comprehensive strategy of measures to suppress transmission and save lives; the use of a mask alone is not sufficient to provide an adequate level of protection against COVID-19.<sup>275</sup>

There were also messages trying to doubt purpose of the masks and their level of protection against coronavirus pandemic.

35.33% women agreed with the statement compared to 40.03% men including message that masks give a false sense of security ( $p=0.0$ ).

Later on, as people started to be more open and observe other how do they wear and government measures against COVID-19 were more and more strict, the public media and doctors and other authorities started the awareness arising process how to put on and take off the masks without contamination.

38.90% of women and 37.21% of men agreed with the statement: It is essential to wear the mask correctly. It must fit airtight to the skin, otherwise its effect is lost. Doffing of the mask needs to be properly done as well ( $p=0.014$ ).

Working people wearing masks 8 hours in their shift, feel that surgical masks is not enough to protect them. At the beginning of the pandemic in March 2020, people wear one masks whole working day without possibility to change it due to lack of them.

39.66% of women and 37.60% of men agreed with the statement: Breathing dampens the mask. Therefore, air is inhaled and exhaled unfiltered around the edges, losing the protective effect.

On other hand, people could see used masks on public places, grass or car parkings, it started to call for the ecological initiatives to reduce the negative impact of producing millions of masks all over the world. There was no significance in the statement ( $p=0.205$ ): Producing millions of masks increased number of negative impacts on the climate changing and environment.

Dimension 2: Impact of existing strategies from the National Council and public health authorities on the prevention of spreading the COVID-19 at the first wave of pandemic

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275 (When and how to use masks who.int, 2020).

**Hypothesis 2: There is different perception of government measures against the spread of COVID-19.**

We used standard deviation to analyse the perception of the government measures linked with the coronavirus pandemic on the basis of 6 dimensions of APEASE criteria (in Perski et al., 2021)<sup>276</sup>:

- 1, Acceptability: is it judged to be acceptable by all key stakeholders,
- 2, Practicability: can it be delivered as intended, at the scale intended and in the context intended,
- 3, Effectiveness: will it deliver the desired outcome in the target population,
- 4, Affordability: can it be afforded within an acceptable budget,
- 5, Spill-over effects: is it likely to have additional negative or positive consequences,
- 6, Equity: is it likely to increase or decrease inequalities in society adopted from,<sup>277</sup> the sample used scale 1-4 to express subjective attitude and agreement/disagreement with it at the scale scoring 1 the most/the best acceptable to the worst.

**Table 3. Perception of government measures**

Measures SD	1	2	3	4	5	6
Wearing masks	1.5	1.0	3.0	1.4	1.0	1.0
Washing hands and public disinfection	1.0	1.0	2.0	1.5	1.0	1.0
Social distance	2.5	2.0	1.0	2.0	3.0	1.0
Physical distance	1.0	2.0	3.0	3.0	2.0	2.0
Home office	1.0	2.5	1.0	3.0	2.0	1.5
Closing shops, restaurants, public facilities	1.0	1.0	2.5	2.5	2.0	1.5
Church restrictions	1.3	1.5	3.0	1.5	2.0	1.0
Limited number of people in one place	1.5	2.0	2.5	1.5	1.0	1.0
Testing – Ang or PCR	2.0	2.0	2.0	3.0	4.0	1.5
Closed schools and online education	2.0	2.5	1.5	4.0	4.0	2.0
Job restrictions, closed fabrics	3.0	3.0	2.5	3.0	4.0	3.0
Pandemic home-children care up to 11 years	2.0	4.0	2.0	4.0	3.0	2.5
Limitations at the borders	1.5	3.0	3.0	4.0	3.0	2.0

**Note: 1 acceptability, 2 practicability, 3 effectiveness, 4 affordability, 5 negative-sides effects, 6 equity (APEASE criteria) adopted from (West, Michie et al., 2020), scale scoring 1 the best to 4 the worst**

Respondents reported the wearing masks, public disinfections, limitation at borders and physical distance as the best applicable, practicable and effective government measures against Covid-19 pandemic. On the other hand, the worse acceptable measures with negative side-effects were reported government measures such as: PCR or antigen testing, closed schools and online education, job restrictions and home care of schooling children (Table 3).

276 O. Perski et al., Interventions to increase personal protective behaviours to limit the spread of respiratory viruses: A rapid evidence review and meta-analysis, Jan 5, 2021, doi:10.32388/OJXD82.

277 R. West et al., *Achieving Behaviour Change: A Guide for Local Government and Partners* (Public Health England, 2020) ; R. West et al., Applying principles of behaviour change to reduce SARS-CoV-2 transmission. *Nat Hum Behav* 4, (2020): 451–459, https://doi.org/10.1038/s41562-020-0887-9

**Domain 3: Personal protective behaviours vs. personal motivational factors to wear masks**

**Hypothesis 3: There are different factors influencing acceptance/refusal to wear the face mask.**

The research study has shown different attitudes to acceptance of wearing face masks in the dimension: personal protection (p=0.027), government punishment (p=0.064), health protection linked with pandemic fear (p=0.022) between men and women.

**Table 4. Attitudes to wearing face masks**

Attitudes to wearing face masks	Women Agree	Women Disagree	Men Agree	Men Disagree	Chi-test P
<b>Personal protection / needs</b> I do have to wear a face mask for my own safety.	34.77	18.23	34.96	13.20	0.027
<b>Government punishment</b> I wear mask due to government punishment mostly, not for my health protection	39.66	12.21	20.30	27.82	0.064
<b>Protection of others</b> We're putting on masks, because we want to protect other people,	35.52	16.35	25.18	22.93	0.139
<b>Health protection</b> Wearing masks due protection of collective health in the community	33.27	18.60	29.51	18.60	0.171
<b>Economic priorities</b> We could really depend on our government officials and leadership to come back to normal life	32.14	19.74	29.32	18.79	0.176
<b>Equality</b> Wearing masks is ethical norm and we all are on same boat	34.96	16.92	19.55	28.57	0.163
<b>Pandemic fear</b> I am afraid of the pandemic consequences and keep social distance including wearing mask	40.41	11.46	35.90	12.21	0.022
<b>Assume Less</b> It's a small price to pay, just to protect other people	33.83	18.04	23.49	24.62	0.118

**Note: 1 totally agree 4 absolutely disagree**

**Protecting myself, my health/needs versus conflict of health and economic priorities**

If you wear a mask you are saying that you are on the same boat trying your best to keep you healthy and protect others and from the others who can be potentially receivers of COVID-19. The anger they feel is not simply about the mask, but about believing the non-mask wearer is a certain type of person. Wearing masks is not only individual think, but it is worldview and political allegiance to point out the seriousness of the coronavirus.

On the other hand, masks are also linked to the broader debate about the disease threat from the coronavirus versus and the devastating impact that social distancing has had on our economy and also on the personal health while wearing masks the most of the time, it can cause headache, increased risks of depression, anxiety and hopelessness. They are many people, stakeholders and political and economic emphasis than the left on the need to restart the economy.

#### Government punishments vs. equality

There are different attitudes to coronavirus pandemic to see the virus as a more dire threat; people on other side are more likely to downplay its seriousness or compare it to less deadly strains like the flu, often following the lead of politicians with economic priorities.

% of woman and % agreed with the statement: I wear mask due to government punishment mostly, not for my health protection (p=)

#### Health protection vs. economic priorities

COVID-19 pandemic has had alarming effects on the economy. Millions of people are out of work, and many businesses are likely to fail. Countless people are worried about their ability to survive rather than about their health. % of women and % of men disagreed

#### Pandemic Fear

Finally, fear has spread around the globe along with the virus. The rising number of cases and deaths has put people on edge as they worry about their own health and that of their loved ones. Those who work in healthcare or whose family members do may feel the fear more acutely. The elderly and other groups at greater risk for a poor outcome with the virus also tend to be more concerned about it.

There are several types of people with pandemic fear:

People who are extremely fear about the negative or fatal consequences of the coronavirus.

Another people find masks intolerable because of conditions like autism spectrum disorder and sensory processing issues.

People who are persuade wearing masks is the way of taking away our liberty and human rights. Some people agreed that wearing masks for a long time may cause ethical problems, people forget to shake hands, or smile or take care of teeth hygiene and start to believe that wearing masks.

Some people also don't like masks because they panic when wearing one, due to claustrophobia or feeling like it's hard to breathe.

#### Assume Less

Conflict over masks is likely to continue as the debate over how and when to reopen the country intensifies. If possible, try to assume as little as possible about others based on whether or not they're wearing a mask. This is not to say that wearing a mask in public is simply a matter of personal choice. Masks aren't like seatbelts: They protect others more than they protect you, and the CDC recommends wearing them in public spaces when you can't appropriately social distance.

#### Domain 4: Focuses on adherence to behaviours required to reduce virus transmission

During pandemics of respiratory viruses, multipronged approaches involving both pharmacological (e.g. vaccination) and behavioural measures (e.g. hand washing, physical distancing) are required to bring the reproductive number below 1.<sup>278</sup> Population-wide restrictions are costly from financial, social and psychological perspectives: the world economy has been projected to shrink by approximately 4.9% in 2020 (International Monetary Fund, 2020), with an additional 88 million people globally being pushed into extreme poverty (i.e. living on less than \$1.90/day)<sup>279</sup>, and prolonged periods of social isolation are associated with family dysfunctions and poor mental health. Personal protective behaviours are thus important for supporting the easing of lockdown measures to ensure long-term suppression of viral transmission and preparedness for new viral waves and future pandemics.<sup>280</sup>

#### Hypothesis 4: Personal protective behaviour is connected with the understanding of the purpose of the respiratory masks.

Research results has shown differences in these dimensions: psychical capability (p=0.045), automatic motivation (p=0.039) and social opportunity (p=0.028) between women and men. Motivation is an aggregate of mental processes that energise and direct behaviour. Psychical capability is the important mainly for women who need to empower mental functioning more often than men especially in crisis situation. 39.28% of women agreed that motivation to wear mask is influenced by psychical capability compared to 30.26% of men. Motivation to wear mask is closed linked with the automatic motivation including habitual and affective process (p=0.039). 34.58% of women and 32.51% of men reported automatic motivation as the key for using face masks as a natural thing, it takes time to get used to wear it and connect masks with the personal identity. That's why we could see home-made masks that are made according the personality characteristics. There is significant relation between social opportunity and wearing face masks (p=0,028). Social status, cultural background and social norms or ethics make a great impact on the social behaviour and acceptance of the new pandemic situation requiring need to follow the rules and restrictions for protection of others.

278 R. West et al., *Achieving Behaviour Change: A Guide for Local Government and Partners* (Public Health England, 2020) ; R. West et al., Applying principles of behaviour change to reduce SARS-CoV-2 transmission. *Nat Hum Behav* 4, (2020): 451–459, <https://doi.org/10.1038/s41562-020-0887-9>

279 P. Blake et al., 2020 Year in Review: The impact of COVID-19 in 12 charts. World Bank Blog.

280 Perski et al., Interventions to increase, Jan 5, 2021, doi:10.32388/OJXD82.

**Table 5. Aspects of motivation (%)**

Dimension	Women Agree	Women Disagree	Men Agree	Men Disagree	P
Psychical capability: person's mental functioning (e.g., understanding and memory)	39.28	12.97	30.26	17.85	0.045
Physical capability: person's physique and musculoskeletal functioning (e.g., balance and dexterity).	27.63	24.24	22.55	25.56	0.157
Reflective motivation: conscious thought processes (e.g., plans and evaluations)	20.67	31.20	19.73	28.38	0.258
Automatic motivation: habitual, instinctive, drive-related and affective processes	34.58	17.29	32.51	15.60	0.039
Physical opportunity: inanimate parts of the environmental system and time (e.g., financial and material resources).	19.17	32.70	20.30	27.82	0.131
Social opportunity: cultural background, social norms, ethics	39.28	12.59	37.40	10.71	0.028

**Note:** using APEASE criteria adopted from (West, Michie et al., 2014, 2020), scale scoring 1 the best/the most to 4 the worst

**Discussion**

German research study confirmed face masks reduced the cumulative number of registered COVID-19 cases between 2.3% and 13% over a period of 10 days after they became compulsory.<sup>281</sup> The resistance of airborne vegetative cells and endospores by surgical masks worn by simulated contagious patients supports surgical mask use as one of the recommended cough etiquette interventions to limit the transmission of airborne infectious agents.<sup>282</sup>

Data regarding the “real-world” effectiveness of wearing face masks are limited to observational and epidemiological studies.

An investigation of a high-exposure event, in which 2 symptomatically ill hair stylists interacted for an average of 15 minutes with each of 139 clients during an 8-day period, found that none of the 67 clients who subsequently consented to an interview and testing developed infection. The stylists and all clients universally wore masks in the salon as required by local ordinance and company policy at the time.<sup>283</sup>

In a study of 124 Beijing households with > 1 laboratory-confirmed case of SARS-CoV-2 infection, mask use by the index patient and family contacts before the index patient developed symptoms reduced secondary transmission within the households by 79%.<sup>284</sup>

281 Mitze et al., Face Masks Considerably, 2365-9793.

282 CF. Green et al., Effectiveness of selected surgical masks in arresting vegetative cells and endospores when worn by simulated contagious patients, *Infect Control Hosp Epidemiol.* 33, no. 5 (2012): 487-494. PMID: 22476275external icon

283 MJ. Hendrix et al., Absence of Apparent Transmission of SARS-CoV-2 from Two Stylists After Exposure at a Hair Salon with a Universal Face Covering Policy – Springfield, Missouri, May 2020, *MMWR Morb Mortal Wkly Rep.* 69, no. 28 (2020), 930-932.10.15585/mmwr.mm6928e2.

284 Y. Wang et al., Reduction of secondary transmission of SARS-CoV-2 in households by face mask use, disinfection and social distancing: a cohort study in Beijing China, *BMJ Glob Health* 5, no.5 (2020), 10.1136/bmjgh-2020-002794. <https://www.ncbi.nlm.nih.gov/pubmed/32467353>external icon.

A retrospective case-control study from Thailand documented that, among more than 1,000 persons interviewed as part of contact tracing investigations, those who reported having always worn a mask during high-risk exposures experienced a greater than 70% reduced risk of acquiring infection compared with persons who did not wear masks under these circumstances.<sup>285</sup>

The American study presented the relation between wearing masks and close working and found that use of face coverings on-board was associated with a 70% reduced risk.<sup>286</sup>

The capability–opportunity–motivation–behaviour (COM-B) model is consisted of three main domains influencing the human behaviour. Capability is an attribute of a person that together with opportunity makes a behaviour possible or facilitates it. Opportunity is an attribute of an environmental system that together with capability makes a behaviour possible or facilitates it. Motivation is an aggregate of mental processes that energise and direct behaviour.

The motivational part of COM-B is elaborated in the PRIME theory of motivation. This recognises that any behaviour can be influenced by both reflective and automatic processes. It proposes that these do not operate in parallel but rather that the proximal cause of all behaviour is always the balance between potentially competing impulses and inhibitions.<sup>287</sup>

PRIME theory also recognises the importance of identity: the aggregate of our beliefs and the images of ourselves as we are, have been or could be, with the feelings attached to these.<sup>288</sup> These can be so strong that they even override need for survival. Finally, PRIME theory recognises the importance of imitation and modelling in human behaviour.<sup>289</sup>

285 P. Doung-Ngern et al., Case-Control Study of Use of Personal Protective Measures and Risk for Severe Acute Respiratory Syndrome Coronavirus 2 Infection, Thailand, *Emerg Infect Dis.* 26, no. 11 (2020), 10.3201/eid2611.203003

286 DC. Payne, et al., SARS-CoV-2 Infections and Serologic Responses from a Sample of U.S. Navy Service Members – USS Theodore Roosevelt, April 2020. *MMWR Morb Mortal Wkly Rep.* 69, no. 23 (2020):714-721.10.15585

287 West et al., Applying principles of behaviour, *Nat Hum Behav* 4, (2020):451–459, <https://doi.org/10.1038/s41562-020-0887-9>

288 M. J. Hornsey et al., Social identity theory and self-categorization theory: a historical review. *Soc. Personal. Psychol. Compass* 2, (2008): 204–222.

289 S. Michie et al., *ABC of Behaviour Change Theories* (Silverback Publishing, 2014).

Behaviour	Capability	Opportunity	Motivation
Wear face masks as appropriate	Understanding type of masks, when and how to use them. Developing techniques for taking them off without causing contamination.	Availability of suitable masks or facilities for making them and opportunities for re-contamination	Establishing strong routines around safe removal and disposal of masks. Preventing feelings of false reassurance leading to neglect of other personal protective behaviours.
Maintain social distance staying at home	Understanding of its importance, purpose and goals	Strict and clear rules what social distance is and create a safe environment at home Availability of services and resources Access to home-based leisure facilities and	People must feel a very strong need to stay at home and obey social distancing rules, and this must be stronger at all times than the want or need to socialise, earn money or pursue usual activities.
Maintain physical distance	Understanding its importance and knowing the distance in metres, how to speak together keeping physical distance	Rules and procedures to keep distance (for example, maximum number of people in a shop) or support the behaviour including social rules about contactless greeting.	To understand it as a prevention, not rude behaviour
Washing hands or using disinfection in public places	Knowledge of effective hand-washing or disinfectant techniques and knowledge of good products for disinfection on hand and surface not at the same time	Availability of soap and washing facilities or effective hand sanitiser at all times when required.	the behaviour needs to be self-trained so that it becomes habitual, as it is not habit for all people equally
Not touching face and T-zones	developing methods for stopping oneself doing it (for example, focusing on keeping hands below shoulder level).	Not prohibited, but It could important to develop norms around not face-touching in public.	People must feel a very strong need to prevent themselves touching their T-zone to overcome the powerful habitual and sensory factors driving it.
Good health habits	Understanding the importance of this, what kinds of manners are effective and how to do it effectively in a way that minimises risk of virus.	To keep good health habits – do not touch mobile if your hands need to be clear and well as mobile by using right disinfection Enough time to be able to do it	People must feel a need to do it whenever required, even when it gets in the way of other activities.
Isolation of people who have symptoms	achieving it tailored to the specific household and family circumstances. Understanding ways of mitigating the adverse psychological effects.	Access to space and physical domestic arrangements that make this possible. Access to services and resources to maintain physical and mental health. Access to home-based leisure facilities and ways of carrying on working that can be undertaken in isolation.	Break emotional barriers, develop new habits to sustain the behaviour and be motivated to find ways to overcome specific challenges that occur from time to time.

**Source: Adjusted according to West, Michie, Rubin et al., 2020<sup>290</sup>**

In 2016, Smith et al.<sup>291</sup> concluded that possible advantages of wearing a mask were difficult to apply to the social “day-to-day” situation. Konda et al. (2020)<sup>292</sup> highlighted the inability to discriminate between the protective effects of the mask on the environment, when worn by an infected person, versus the general protective effect within a given population.

This would not have a significant health benefit if only a small percentage of individuals were infected. Only a study done in infected people with and without masks would allow a clear conclusion on the role of masks on the spread of the infection. Finally, a lesson learnt from the COVID pandemic shows significant educational gaps and lack of basic training that need to be addressed. The state should guarantee mask supply for everyone and educate on the proper use.<sup>293</sup>

From a medical standpoint, there is a theoretical possibility of an airflow obstruction when wearing a mask. A subjective feeling of strained breathing rarely occurs when wearing surgical masks. When wearing very dense masks without valves (N95/FFP2-3), breathing occurs against an air flow resistance. Theoretically, an increase in work of breathing can occur, especially during physical exertion.

**Conclusion**

The first wave of coronavirus pandemic at the beginning of the March 2020 was linked with the misunderstanding, extreme fear of negative consequences of unknow virus COVID-19 when human behaviour was out of control from excessive shopping, social hiding, information hoax to irresponsible behaviour and refusal to wear masks to belief that COVID-19 is only stronger influenza. There is point to understand motivations and barriers of using face masks or follow government restrictions to achieve good health communication and impact health behaviour to reduce COVID-19 transmission.

**AUTHOR CONTRIBUTIONS**

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

**CONFLICT OF INTEREST**

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

290 West et al., Applying principles of behaviour, *Nat Hum Behav* 4, (2020):451–459, <https://doi.org/10.1038/s41562-020-0887-9>

291 JD. Smith et al. Effectiveness of N95 respirators versus surgical masks in protecting health care workers from acute respiratory infection: a systematic review and meta-analysis *CMAJ* 188, no. 8 (2016):567–74.

292 A. Konda, et al., *Aerosol Filtration Efficiency of Common Fabrics Used in Respiratory Cloth Masks* (ACS Nano, 2020).

293 Matuschek et al., Face masks, *Eur J Med Res* 25, no. 32 (2020), <https://doi.org/10.1186/s40001-020-00430-5>

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## PARAKLÉTOS AND DECONSTRUCTION OF THE CULT OF ABSOLUTE INDEPENDENCE OF THE HUMAN INDIVIDUAL

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### Abstract

**Background:** The study seeks to provide a methodological critique of the cult of absolute independence of the human individual, based on a mimetic analysis by René Girard and its relationship to the anthropological bases of thought of Friedrich Nietzsche. Nietzsche's thinking positions itself as one of the most influential pillars of contemporary individualism, relativism, and belief in the absolute independence of the human individual. Yet, Nietzsche's philosophy is one of the inspirational sources of mimetic theory of culture, which is one of the most comprehensive critiques of subjective human autonomy. In terms of conceptual thinking about culture and the human individual, the key starting point for both authors is an anthropological analysis of the Gospels, which both approach as the prism of cultural-social anthropology.

**Conclusion:** The study focuses on a comparative analysis of both approaches and structural continuity between Nietzsche's and Girard's conclusions. Both approaches are marked by radical crowd criticism, victim centrality, and the Gospels read as revealing anthropological tools.

**Keywords:** Autonomy – Memesis – Nihilism – René Girard – Friedrich Nietzsche.

### Introduction

Western civilization carries certain indisputable values and advantages of humanity that are inherently related to the Christian ethos, which follows from an understanding of the human being as a person. This is what enabled a civilizational progress that is visible, inter alia, through the emancipation of an individual from the yoke of various institutional and collective dependencies. Augustine's discovery of human subjectivity gave rise to the gradual development of human self-knowledge that found its peak in modernity in the Universal Declaration of Human Rights which guarantees respect for the inalienability of human dignity. Human beings were granted the freedom of conscience that respects human autonomy. The independence, individual uniqueness, and complete autonomy of the subject is yet another conviction that has become a part of universal awareness and self-referential narratives. Independence was recognized as a hallmark of the modern human being. Modern individuals view themselves as great personalities based on the extent to which they can define themselves as those who are independent from other people, institutional affiliation, authorities, commitments, and, last but not least, God. One can even claim that modern western civilization is, to a significant degree, characterized by individualism that implies symptoms

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of the worship of absolute independence of the human individual.<sup>295</sup> This is further related to the phenomenon of the continuing dechristianization of western societies. One of the reasons why the Christian message is waning from social discourse is the fact that the transmitting of the gospel collides with the consequences of the worship of the autonomous individual, characterized by almost hermetic incommunicativeness toward the authority of revelation. When discussing the worship of the independent individual, an indisputable authority is philosopher and philologist Friedrich Nietzsche. On the face of it, he may appear as an opponent of the gospel discourse. However, reality is much more complex.

The gospel can never be intermediated in a violent, authoritative or apodictic manner. It must be inculturated. This process cannot be pursued without anthropological insight into the psychosocial reality of the human environment. Let us now explore whether, and to what extent, the human being truly is, from an anthropological perspective, an absolutely independent and autonomous subject. Furthermore, we will examine what venues the nihilistic concept opens for dialogue with the gospel.

### Mimetic dynamism of culture

The fundamental point of departure for this study represents placing the theme of the worship of the autonomous individual into the methodological framework provided by René Girard. First of all, we will seek to sketch its structure since it is still not sufficiently known in the Czech and Slovak contexts. We will use certain terms that Girard's methodology employs. Therefore, it is necessary to clarify their meaning right from the outset, being aware of the fact that the nature of this study does not allow for any detailed analysis of Girard's theory of culture and the discussion it provoked.<sup>296</sup> Only then will we inquire in which way Girard's theory can enable access to Nietzsche's understanding of the human being.

Although Girard's theory is very much subject to lively academic discussion, it is by no means generally accepted. For many, it is no less than scandalous as it subverts a good deal of intellectual premises. With its interdisciplinarity it corresponds to many trends in the postmodern milieu. An ambitious endeavour, it lays claim to explaining phenomena belonging to the fields of anthropology, psychology, theology, literary studies, etc. At the same time, however, it opposes the relativism of postmodern thinking, even being explicitly loyal to Christianity. And that is precisely why it is inflammatory and unacceptable for many members of the academic establishment.<sup>297</sup>

Girard's critical attitude toward the academic establishment is not rare among the voices coming from the academic elites themselves. In 2003, Terry Eagleton published his *After*

295 Cf. Laura Bazzicalupo, *Il governo delle vite* (Milano: Mimesis, 2008); Zygmunt Bauman, *Individualizovaná společnost* (Praha: Mladá Fronta, 2005) [*The Individualized Society* (Cambridge: Polity Press, 2001)]; Gilles Lipovetsky, *Èra prázdnoty. Úvahy o současném individualismu* (Praha: Prostor, 2008) [*L'ère du vide: Essais sur l'individualisme* (Paris: Gallimard, 1983)]; Małgorzata Jacyno, *Kultura indywidualizmu* (Praha: Slon, 2012); Daniel Shanahan, *O zrodu a vývoji individualismu* (Praha: Togga, 2015) [*Toward a Genealogy of Individualism* (Cambridge, MA: MIT Press, 1992)].

296 For this purpose, we refer to the excellent study by Michael Kirwan who critically discusses the reactions to and critique of Girard's method for exploring culture. The views of this theory range from the assessments that label it as a scientific hypothesis open for corrections, to the assessments that laud it as a revealed theological truth. Girard is, on the one hand, referred to as the Darwin of the modern humanities while, on the other hand, there are accusations of his theory being nothing but a totalizing oppressive metanarrative. Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 97-123 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

297 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 100 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

*Theory*.<sup>298</sup> In this book, he discusses general overcautiousness with respect to any attempt at a more complex multidisciplinary understanding. He refers to this overcautiousness as holophobia.<sup>299</sup> Eagleton sees the essential reason for this position, largely adopted by the contemporary academia, in a lack of solid anthropological and ethical foundations. Girard's theory provides these foundations – without falling prey to dogmatic rigidity.<sup>300</sup>

For us, mimetic theory will be of interest as a hermeneutic method for interpreting various texts, phenomena, and realities to provoke an experience of “conversion,” of disclosing one's own mimesis, imitation. In this respect, Girard's theory may be regarded as a “destroyer of systems.”<sup>301</sup> Challenging and provocative, this hermeneutic attracts us to a “life in truth” that always transcends the borders of any given system. When reading and analysing classic European novels, Girard noticed that each author wrote a key work that reproduces the same pattern: namely, the pattern of death and resurrection or, more precisely, conversion and resurrection.<sup>302</sup> It is this pattern that makes a significant contribution to the greatness of the European novel,<sup>303</sup> although it is quite banal and usually appears close to the end in important European novels.<sup>304</sup> For the time being, let us hold back on what exactly Girard means by conversion. For now, it suffices to say that it is primarily not an experience of religious conversion or an existential experience. Girard interprets it as a way of “human revelation” (i.e. an anthropological constant) that discloses presuppositions regarding human nature. Conversion is, for Girard, understood as a true scholarly (epistemological) assumption. In what follows we will come back to the theme of conversion to specify it in a greater detail.

Girard started studying and analysing in detail the pattern of conversion, or death and resurrection, eventually formulating a hypothesis that this pattern represents a constitutive anthropological constant of one's humanity. If this is so, then the pattern will find its expression in everything one does, in the very essence of culture. Girard's subsequent research in the fields of literature, mythology, and cultural and social anthropology brought about unexpected results that cannot simply be disregarded. It is especially with regard to the question of the relationship between violence and the sacred and the question of human individual and collective rivalry that Girard's research proved to be an invaluable tool for understanding.

The mimetic theory of culture is one of the few theories that strive to understand cultural phenomena, first and foremost violence, from the very dawn of culture. It theorizes culture as a series of interlocked and generatively dependent realities that are driven forth by what Girard refers to as mimetism, a process of imitation. His thinking follows from the premise that human beings desire to imitate the desires of those whom they regard as their role models. Thus, Girard re-classifies desires from a biodeterministic code to a cultural one. Society, he argues, develops on the basis of a mimetic mechanism. This, inter alia, inevitably leads to the

298 Cf. Terry Eagleton, *After Theory* (London: Penguin Books, 2003).

299 Terry Eagleton, *The Illusion of Postmodernism* (Oxford: Wiley-Blackwell, 1996).

300 Cf. René Girard, “Generative Scapegoating,” in *Violent Origins*, ed. Robert Hamerton-Kelly (Stanford: Stanford University Press, 1987), 114.

301 Cf. Michael Kirwan, René Girard. Uvedení do díla (Brno: CDK, 2008), 127 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

302 Cf. René Girard, *Lež romantismu a pravda románu* (Praha: Dauphin, 1998), 49 and 329 [*Deceit, Desire, and the Novel: Self and Other in Literary Structure*, trans. Yvonne Freccero (Baltimore and London: The Johns Hopkins University Press, 1965)].

303 Cf. René Girard, *A Theatre of Envy: William Shakespeare* (Oxford: Oxford University Press, 1991), 339.

304 Cf. René Girard, *Lež romantismu a pravda románu* (Praha: Dauphin, 1998), 326 and 340 [*Deceit, Desire, and the Novel: Self and Other in Literary Structure*, trans. Yvonne Freccero (Baltimore and London: The Johns Hopkins University Press, 1965)].

fact that one as a desiring subject competes against one's role model to get an object that they both desire. Mimetism becomes rival mimetism. The latter is highly conflictual in itself. Due to its consequences, people realize this fact. Therefore, they establish a hierarchy between desiring subjects and their role models, thus effectively dampening the conflict. When a society fails to establish a hierarchy between subjects and role models, a potential conflict starts evolving that can escalate and eventually lead to an open conflict with elements of mass violence. The reason is that one always desires the object of one's desire (acquisitive mimesis);<sup>305</sup> however, one is never alone in this process. This leads to conclude that acquisitive mimetism is, at the same time, rival mimetism. With the increasing rivalry, the attention of the rivals is increasingly focused on each other. The original object of desire begins to diminish and disappear from one's focus. Imitation that is the basis for all cultural transmission is highly conflictual. As such, culture implies implicit agonism.<sup>306</sup> However, how is one to cope with this increasing mimetic rivalry? According to Girard, people have discovered an instrument to cope with the increasing antagonism through the scapegoat mechanism.<sup>307</sup> It is through this mechanism that group violence is channelled towards a specific object. The more specific the object is, the better the mechanism functions. The most efficient channeling occurs when the object in question is a specific individual on whom the responsibility for a crisis, conflict situation, failure, or escalated tension in the society has been transferred. With regard to the fact that society needs to face crises, difficulties, famine, epidemics, and social turmoil regularly, it is clear that the mechanism of searching for the object responsible for the crisis gets gradually rooted, automated, and ritualized. It becomes a bifurcated structure that generates not only social norms and taboos but also institutions and symbolic forms such as language and rituals. Girard maintains that without the discovery of the scapegoat mechanism, society would be endangered by destruction. As such, Girard applies the theory of evolution by natural selection to the humanities.<sup>308</sup>

It is most interesting how Girard verifies his hypotheses. Of crucial importance, for him, are all anthropological and ethnological data; first and foremost, myths and rituals. He is also very much intrigued by literature, especially novels. He interprets the aforementioned data as a “*body of evidence*” supporting “*things hidden since the foundation of the world*,” especially the evidence for society being rooted in the ritualized slaughter of a scapegoat. Like criminalistics, culture also operates upon the principle of a murderer returning to a crime scene, while leaving behind a whole set of footprints and hints.<sup>309</sup> Great literary works rep-

305 Right at the beginning of the biblical revelation, there is a story about the original sin of Adam and Eve; a fruit from the tree of knowledge of good and evil becomes an object of acquisitive mimesis that seduce to imitate. Cf. Michael Kirwan, René Girard. Uvedení do díla (Brno: CDK, 2008), 91 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

306 Cf. René Girard, O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha (Brno: CDK, 2008) [Evolution and Conversion: Dialogues on the Origins of Culture (London: Bloomsbury, 2008)]. 8. The whole mechanism is elaborated in detail, especially in two basic studies, by René Girard, *La Violence et le sacré* (Paris: Grasset, 1972) [*Violence and the Sacred*, trans. Patrick Gregory (Baltimore: Johns Hopkins University Press, 1979)] and *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978) [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)].

307 Cf. René Girard, *Celui par qui le scandale arrive* (Paris: Desclée de Brouwer, 2001) [*The One by Whom Scandal Comes: Studies in Violence, Mimesis & Culture*, trans. Malcolm B. DeBevoise (East Lansing: Michigan State University Press, 2014)].

308 Cf. Michel Serres, *Atlas* (Paris: Julliard, 1994), 220.

309 René Girard, O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha (Brno: CDK, 2008), 11-12 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

resent hints and evidence that refer us to the real world; they account for the passions and conflicts of real people.

At the beginning, we mentioned the term “conversion.” Girard uses it in a very specific way. For him, conversion represents an epistemological assumption. Without conversion, one can understand neither the nature of the mimetic mechanism nor the mechanism of mimesis itself. Girard finds the primary significance of the greatest novels specifically in the fact that they contain a thorough description of the phenomenon of conversion (death and resurrection). What does Girard mean by conversion? To convert means to understand the fact that our independence from an abundance of role models is merely imaginary; we are lenient toward our own mimetic behaviour and our own paranoid ideas, stereotypes, and ritualized prejudices. The autonomy of the modern subject is nothing but a fiction. In fact, the human being is trapped in a kind of mimetic cage. Thus, conversion means gaining insight into one’s own mimetism. Similarly, structuralism and hermeneutics refuted the optimistic Enlightenment and Romantic myth of the autonomy of the modern subject. However, Girard goes much further in his thinking. With its modern liberal spirit, the world takes increasingly great pains in confirming people in methodological individualism, while planting in their minds a tendency to believe in their freedom of choice and conviction. Only insufficiently or not all does it admit that the human being simultaneously represents an intersection of inner contradictions. “Here, to convert therefore means to become fully aware of the fact that we never cease to be pulled by mimetic desire and that we do not have the freedom of choice we imagine we have.”<sup>310</sup> Conversion is the realizing and coming to terms with the fact that we are both subjects and objects of mimetic desire.

This is precisely what Girard shows using the work of the five most important European novelists in his study “Romantic lie and novelistic truth” (direct translation from French; published in English as *Deceit, Desire, and the Novel: Self and Other in Literary Structure*). Those authors, Girard believes, had undergone a liberating experience that inspired their work. The experience was conversion. Each one of them showed elements of understanding desire as mimetic imitation.<sup>311</sup> The more artistically accomplished their works are, the more explicit expressions of mimetic desire they feature. This observation led him to outline a perichoretic relationship between culture, religion, and violence. It is here that Girard’s interest in Christianity begins to be formed. Eventually, Girard formulates his thesis that our desires are, by and large imitations, and that society tends to channel these desires, generated by mimetic interaction, through the scapegoat mechanism that is in the background of all religious practices and secular institutions. In the process, Girard discovers the Christian revelation to be the primary reason for people being able to realize the truth about covert and clandestine violence and as the power enabling a radical alternative – a transformation of human life.<sup>312</sup>

### Perichoresis of religion and culture

Some authors sought to unmask Girard as a religious thinker bent on Christian apologetics. Many are literally outraged and irritated by Girard’s explicit adherence to Christianity, and particularly Catholicism (sic!). The stereotype of incompatibility of science and faith largely persists through various animosities, aversions, and allergies. Girard’s texts may be read as

310 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 13 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

311 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 19 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

312 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 10 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

texts with a distinct Christian perspective on the substance of culture, even as a sophisticated form of Christian apologetics.<sup>313</sup> At first glance, this might seem to be scientifically incorrect. Some of his texts can be ascribed the status of fundamental theology or, even more precisely, fundamental anthropology, provided that the author himself recognized them as such. However, Girard insists on the scientific consistency of his approach. Moreover, Girard had formulated his method, based on the discovery of the mimetic, persecution and scapegoat mechanisms, before he discovered Jewish and Christian sacred texts.<sup>314</sup> He dates his own conversion back to the period when he was working on “Romantic lie and novelistic truth” (direct translation from the 1961 French original; it was published in English as *Deceit, Desire, and the Novel: Self and Other in Literary Structure* in 1965). However, this conversion was an intellectual-literary one, as suggested above. He found his way to a religious conversion much later. At the same time, Girard admits that he was decisively led to the religious conversion by the results of his research as well as the fact that he had always cherished a hope that “*meaning and life are one and the same*.”<sup>315</sup>

Girard employs literature and myth to deconstruct the border between reality and fiction. The outrageous part is the fact that “*Girard does not hesitate to point out that Christianity never ceased to be the most fruitful discipline of the humanities*” or to assert that “*the gospels offer a theory about human beings, an anthropology*” and that “*the very nature of our culture is connected with the sacrifice*.”<sup>316</sup> Girard takes great pains to thoroughly point out a difference between the worldview of the myth and the worldview of the gospel. He suggests that “*Christianity provides a much better understanding of myths than any anthropologist*”<sup>317</sup> as the symbolic meanings of the gospels unprecedentedly unmask the mimetic nature of culture. Girard came to this conclusion after having studied hundreds of literary works, analysing sacred texts through the lens of structural cultural anthropology. He was astonished to discover that whatever was disclosed to him through droplets in other texts was present with absolute clarity and matchless concentration in the gospels. This finding induced him to develop his mimetic theory of culture. Nevertheless, Girard continued to insist that the point of departure for scientific knowledge can be neither a religious a priori, nor an anti-religious truth claim.<sup>318</sup>

313 For example, René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997) [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)]; René Girard, *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978) [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)]; René Girard, *Je vois Satan tomber comme l’éclair* (Paris: Grasset 1999) [*I See Satan Fall Like Lightning*, trans. James G. Williams (Maryknoll: Orbis Books, 2001)]; René Girard, *Celui par qui le scandale arrive* (Paris: Desclée de Brouwer, 2001) [*The One by Whom Scandal Comes: Studies in Violence, Mimesis & Culture*, trans. Malcolm B. DeBevoise (East Lansing: Michigan State University Press, 2014)]; René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008) [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

314 Cf. René Girard, *Celui par qui le scandale arrive* (Paris: Desclée de Brouwer, 2001), 447 [*The One by Whom Scandal Comes: Studies in Violence, Mimesis & Culture*, trans. Malcolm B. DeBevoise (East Lansing: Michigan State University Press, 2014)].

315 Cf. René Girard, *Celui par qui le scandale arrive* (Paris: Desclée de Brouwer, 2001), 447 [*The One by Whom Scandal Comes: Studies in Violence, Mimesis & Culture*, trans. Malcolm B. DeBevoise (East Lansing: Michigan State University Press, 2014)].

316 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 14 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

317 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 166 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

318 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 153 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

Girard's mimetic theory (hypothesis) of culture consists of three parts. The first two parts of the hypothesis, the mimetic mechanism and the scapegoat mechanism, have been acceptable for academia, even evoking considerable response and enthusiasm. However, the third part, in which Girard "claims that the scapegoat mechanism is completely unmasked in the New Testament,"<sup>319</sup> stirs displeasure. The main reason for its rejection is the reference to the historical reality of Christianity. Girard explores this topic at length in his book *Des Choses cachées depuis la fondation du monde* (translated into English as *Things Hidden Since the Foundation of the World*).<sup>320</sup> Here, he analyses and unmaskes the mechanism of collective violence. For him, the gospels represent the primary text that reveals the essence of collective violence. Throughout history, however, it was precisely historical Christianity that was very often liable for the collective violence and persecution unmasked in the gospels. Girard intensely reflects on this reality. His answer markedly deconstructs each form of ethical, aesthetic or religious kitsch. In Girard's view, the gospel text suggests that Jesus was conspired against by all, including his disciples. The latter ran away and denied him, a fact that Girard interprets as evidence of universal mimesis. Unanimity is only restored after the resurrection. "The text of the gospels cannot be blamed for the later generations of Christians distorting its ideas, turning them into a pretext for the persecution of Jews. One can even say that such a distortion of the gospels could have been expected as it follows from the fact that the destabilizing gospel deconstructions of the violent sacred generates, in a relatively short period, situations characterized by an even greater degree of persecution."<sup>321</sup> Girard points out the fact that even though the Christian regards the gospel as revelation, it is "unrecognized" revelation that discloses itself gradually and little-by-little as it permeates the structures of cultural thought.

In the world, "there are no clear-cut divisions; in history, we always find ourselves between gospel and myth."<sup>322</sup> Presently, the theme of victim is increasingly being pushed to the fore in ideological discourse. Victims of wars, catastrophes, ecological crises or famine; victims of the Shoah; victims of capitalism; victims of domestic violence and bullying; and victims of racial, religious, ethnic, and political discrimination are ever more on our radar. Paradoxically, then, western culture is discovering its profoundly Christian roots in an age when Christianity and confessional commitments are dismissed.<sup>323</sup> The West is on a journey from searching for a scapegoat toward a world that almost instinctively sides with the victims. "Throughout the whole of western history ideas of persecution weaken and crumble."<sup>324</sup> That is, Girard maintains, an outcome of the impulse historically provided by the gospel itself. According to Girard, this change is brought about by the Paraclete, which is a gospel title for the Holy Spirit. This term has origins in legal discourse, meaning the advocate of a defendant. Also

- .....
- 319 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 113 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].
- 320 René Girard, *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978), 224-262 [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)].
- 321 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 114 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].
- 322 René Girard, *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978), 260 [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)].
- 323 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 15 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].
- 324 René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 227 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

related to the emergence of Christianity in history is the fact that the Paraclete covertly works in the very foundations of culture.<sup>325</sup> "Not science, but the Christian logos demystifies cultures."<sup>326</sup> The scientific esprit of contemporary western culture postulates the repudiation of the magical-persecutory causality: "People did not stop witch-hunts because they discovered science; on the contrary, they discovered science because they had stopped witch-hunts. Like economic entrepreneurship, scientific thinking is a by-product of the deep influence of the gospels."<sup>327</sup> The Paraclete works in the very roots of scientific knowledge.

Culture and religion are interperaved to such an extent that even a comparison to communicating vessels is not precise enough since it overemphasises the symbolic difference. It is much more appropriate to define the relationship of culture and religion as being perichoretic. It finds an expression especially in the epistemological sense that brings together an opportunity to understand culture by understanding religion and an opportunity to understand religion by understanding culture. Religion, like culture, is paradoxical by nature; on the one hand, it cements society (*re-ligare*), while causing quarrel, disruption, and conflicts, on the other hand.<sup>328</sup> Pre-industrial societies were sensitive especially to the ability to bind; the modern industrial society by and large perceives religion with concern. Girard's theory is the first serious theory of culture of its kind that offers a critical means to understand not only this paradox but also the ingrained rivalry amidst cultures, regardless of whether it concerns conflicts lingering for generations or phenomena such as ostracization, bullying, stigmatization, the mechanisms of xenophobia and racism, or blunt persecution.

#### **The subversion of negative anthropology and axiological deconstruction**

René Girard's theory of culture is inspired by many sources. One can mention Hobbes, Hegel, Freud, and Darwin but, admittedly, the most significant source for Girard was to reflect on the thoughts of Friedrich Nietzsche. Girard dedicated a separate study to Nietzsche's thesis on the death of God.<sup>329</sup> He further explores it in his book *Evolution and Conversion: Dialogue on the Origins of Culture*.<sup>330</sup> Unlike many Christian authors, Girard does not view Nietzsche as an ideological opponent. He acknowledges the profundity and brightness of Nietzsche's insight, leading him to further elaborate on the German philosopher's intuitions. This is reflected in Girard's own thinking. Girard's notion of mimetic desire has numerous parallels, for example, with Nietzsche's concept of *ressentiment*.<sup>331</sup> However, one should be wary of a tempting unproblematic marriage of the two intellectual worlds merely based on their external resemblance or terminological consistencies. We must note that we are aware

- .....
- 325 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 234-235 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].
- 326 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 105 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].
- 327 René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 231 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].
- 328 Cf. René Girard, *La Violence et le sacré* (Paris: Grasset, 1972), 8 [*Violence and the Sacred*, trans. Patrick Gregory (Baltimore: Johns Hopkins University Press, 1979)].
- 329 Cf. René Girard, "The Founding Murder in the Philosophy of Nietzsche," in *Violence and Truth*, ed. Paul Dumouchet (Stanford: Stanford University Press, 1988), 227-246.
- 330 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 98-103 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].
- 331 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 98 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

of a host of dissimilar interpretations of Nietzsche's thought from negative nihilistic<sup>332</sup> and atheistic,<sup>333</sup> through strictly philosophical,<sup>334</sup> vitalistic,<sup>335</sup> perspectivist,<sup>336</sup> psychoanalytical,<sup>337</sup> dialogical,<sup>338</sup> and postmodern ("weak thought"),<sup>339</sup> to the readings that find in Nietzsche an overcoming of atheism<sup>340</sup> or discern in his thoughts negative theology or negative fundamental theology.<sup>341</sup> In what follows, we now turn our attention to some aspects of Nietzsche's anthropology, keeping in mind that we cannot do them full justice. We believe that it is these aspects whose meaning is related to René Girard's mimetic theory of culture.

Exploring Nietzsche's critical focus, we face the question of legitimacy of the cultural values surrounding us, significantly, and automatically, shaping our reality. Nietzsche refuses to content himself with ubiquitous conformism, thus challenging the very production process of values. He enquires into the elements that form the notion of high and low, noble and poor. What is the ultimate factor that establishes the difference between the worlds of low and high? He is astonished that most philosophers did not occupy themselves with the question of value critique, contenting themselves with mere classification instead.<sup>342</sup> To the contrary, Nietzsche coins the term "genealogy." He is convinced that values are inherited. At the beginning of culture, there are mighty and noble individuals who decide what is good and noble as opposed to all that is low. They establish their claim for value creation in one fact only, namely, *the pathos of distance*.<sup>343</sup> At the beginning of culture, therefore, there is a distance between nobility and decadence. Nietzsche aims his critique at the issue of noble and low. The difference that is at the core of the origins of values is not evident at first glance. It can only be sensed by a genealogist who relates all he or she perceives to the most noble, highest, and, therefore, original stages.

Values are thus created and determined by a strong individual (the genealogist), and not an objective framework of being to which the values are headed. History, evolution, and genealogy are not a witness to any logical process toward a certain aim. Rather, they are "a series of more or less profound and more or less mutually independent... processes of struggle, including various forms of resentment that rises each time, of transformations due to the need for defence and reaction, and the results of successful counter-reactions."<sup>344</sup> Thence, there is

332 Cf. Gilles Deleuze, *Nietzsche a filosofie* (Praha: Herrmann & synové, 2004) [*Nietzsche and Philosophy*, trans. Hugh Tomlinson (New York: Columbia University Press, 2006)].

333 Cf. Witold Gombrowitz, *Kurz filosofie v šesti hodinách a patnácti minutách* (Praha: Společnost pro Revolver revue, 2010) [*A Guide to Philosophy in Six Hours and Fifteen Minutes*, trans. Benjamin Ivry (New Haven: Yale University Press, 2004)].

334 Cf. Pavel Kouba, *Nietzsche. Filosofická interpretace* (Praha: Československý spisovatel, 1995).

335 Cf. Lev Borský, *Bedřich Nietzsche* (Praha: Dr. Ant. Hajn, 1912).

336 Cf. Mojmir Hrbek, *Smrt Boha v Nietzscheově filosofii* (Praha: Academia, 1997).

337 Cf. Ingeborg Fiala-Fürst, *Tajemný Zarathustra* (Olomouc: Votobia, 1995).

338 Cf. Bernhard Welte, *L'ateismo di Nietzsche é il cristianesimo* (Brescia: Queriniana, 2005).

339 Cf. Gianni Vattimo, *Introduzione a Nietzsche* (Bari-Roma: Laterza, 2007).

340 Cf. Karl Löwith, "Nietzscheovo dovršení ateismu," *Reflexe* no. 23 (2002): 109-120 ["Nietzsches Vollendung des Atheismus," in *Nietzsche. Werk und Wirkung*, ed. Hans Steffen (Göttingen: Vandenhoeck & Ruprecht, 1974), 7-18].

341 Cf. a very interesting study: Piero Coda, *Il Logos e il Nulla. Trinità, religioni, mistica* (Roma: Città Nuova, 2003).

342 Cf. Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 108-109 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

343 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 16 [*On the Genealogy of Morality*, trans. Carol Diethel, ed. Keith Ansell-Pearson (Cambridge University Press, 1994)].

344 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 59 [*On the Genealogy of Morality*, trans. Carol

a hidden conflict present within the history of culture. There is no meaning that history relates to. Meaning is a liquid, fluid, and pluralistic term. It is appropriate to understand it as a plurality of interpretations enforced by the strong. As a result, values have no solid foundation. Once they mean this, at another time that.<sup>345</sup>

Each individual has certain power through which he or she controls others. This power is in relation to other powers. Respective powers interact together, controlling and subjugating each other. This power that is at an individual's disposal is referred to by Nietzsche as the will: "A will can naturally interact with another will only... we must dare to formulate a hypothesis... whether all mechanical processes, if there is to be any power active in them, is not a power of will, an effect of will."<sup>346</sup> Each power relates to other powers. This happens either to be subjugated or to command. The power of the will, then, is nothing other but *the will to power*. Even the inner world, hidden inside culture, is nothing else but *the will to power*.<sup>347</sup> All will is nothing but a measuring of powers. The will "is about commanding and being obedient only."<sup>348</sup> In the centrifugal and centripetal relationship of the will there is also an affection that activates powers to an extent in which the subjugated powers resist the will.<sup>349</sup> At the same time, the power of the will must necessarily express itself: "To ask power not to express itself as power, not to be a will to overcome, conquer, reign, and thirst after enemies, struggle, and triumphs, is as foolish as to ask weakness to express itself as power."<sup>350</sup>

The constant measuring of powers in society establishes a hierarchy of powers, a hierarchical principle of society.<sup>351</sup> The superior powers are active powers, while the inferior powers are reactive powers (e.g., the power to conserve, adapt, utilize, compromise or regulate).<sup>352</sup> The active powers are by and large related to corporeality and unconsciousness, while the reactive powers are related to consciousness.<sup>353</sup> The logic of this hierarchization process, however, is neither hierarchy establishment nor value codification. *The will to power* only strives to affirm its difference;<sup>354</sup> it strives for self-affirmation. That is the searched-for principle of nobility, values, and morality.<sup>355</sup> First and foremost, it is not about being a master and

Diethel, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

345 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 108-111 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

346 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 39 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

347 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 40 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

348 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 23 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

349 Cf. Gilles Deleuze, *Nietzsche a filosofie* (Praha: Herrmann & synové, 2004), 111 [*Nietzsche and Philosophy*, trans. Hugh Tomlinson (New York: Columbia University Press, 2006)].

350 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 32 [*On the Genealogy of Morality*, trans. Carol Diethel, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

351 "An inherent arrangement in the hierarchy." See Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 164 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

352 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 8 [*On the Genealogy of Morality*, trans. Carol Diethel, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

353 Cf. Friedrich Nietzsche, *Radostná věda* (Praha: Aurora, 2001), 218-220 [*The Gay Science: With a Prelude in Rhymes and an Appendix of Songs*, trans. Walter Kaufmann (New York: Vintage Books, 1974)].

354 Cf. Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 169-172 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

355 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 25 [*On the Genealogy of Morality*, trans. Carol Diethel, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

not being a slave. It is about being different. A slave only sees a master as a non-slave which is yet another form of slavery. In other words, it is not difference in a strict sense of the word. Truly different is only one who is noble and superior. A noble one is elevated over any dialectics of values, even over dialectics itself.<sup>356</sup> A noble one is truly oneself, being beyond values, law, and morals and not belonging to anyone or anything.<sup>357</sup> The affirmation of one's difference and the denial of whatever is different, is done through the quality of one's will, and not through any intention of the will.<sup>358</sup> The will to power is not a purpose-built desire for power; it is the will to live.<sup>359</sup> It is not a will to recognition<sup>360</sup> or a need for nobility. It is the pure will to live.<sup>361</sup> The will to power, therefore, does not intend to negate values; it seeks self-affirmation. Negation becomes affirmation. This is how Nietzsche understands value critique. To his mind, critique is creativity, life itself; it is the joy of destroying the reactive values of decadence.<sup>362</sup>

How do, then, in Nietzsche's view, the notions of good and evil emerge? At the beginning, there is someone noble who uses the term "good" to affirm oneself. Afterwards, slaves adopt this term to identify their master as evil and themselves as good: "... *the oppressed, the trampled over, the violated say out of the revengeful craftiness of their helplessness: 'let us be different than evil, namely, good'... then it means nothing else but: 'we, the weak ones, are nothing but weak; it is good that we do not do anything that we do not have enough power for'... that sublime self-deceit allowed for interpreting weakness as freedom, and the mere fact of weakness as merit.*"<sup>363</sup> Here, we can see a description of the inversion principle. The inversion principle is the general principle of slave morality to which Nietzsche frequently refers.

According to Nietzsche, the contemporary world is increasingly heading towards affirming the will to power that ever more distinctly seeks to liberate itself from the bondage of slave morality. "*However, it is most surprising that everything on earth, what is or was free, delicate, courageous, danceful, and masterfully certain, whether in thinking or reigning, or speaking or persuading, in arts as much as morals, only developed thanks to a tyranny of arbitrary laws.*"<sup>364</sup> Nietzsche goes on to prophesize that such an affirmation, a self-recognition of the will to power, would lead to a rise of rivalry: "*There can be no doubt, morality will cease to exist; that great spectacle in a hundred acts that is ready in Europe for the next two centuries – the most horrendous, daring, and perhaps even the most hopeful of all spectacles...*"<sup>365</sup>

356 Cf. Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 160-164 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

357 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 47-48, 60-64 and 71-72 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

358 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 175 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

359 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 93-96 and 156-160 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

360 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 100-101 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

361 Cf. Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 189 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

362 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 9-11 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

363 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 33 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

364 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 81 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

365 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 133 [*On the Genealogy of Morality*, trans. Carol

### **Ressentiment and the tragic**

This brings us to a key term that connects Nietzsche's and Girard's perspectives on the essence of culture, namely, resentment. It will be helpful to explore what Nietzsche means by this term. Before delving into the concept itself, we must explain what the author has in mind when he speaks about the tragic sense of life (eternal suffering) in society that is inherently linked to resentment.

The eternal presence of suffering is allegorized by Nietzsche in the character of Dionysus. Dionysus symbolizes suffering that is affirmed. Similarly, life itself is affirmed, together with its eternal presence of suffering. Nietzsche criticizes Socrates and other philosophers for setting idea over life. For Socrates and others, life is not worthy an object of desire.<sup>366</sup> Conversely, the tragic person affirms eternal suffering that is part of life. Thus, he or she at the same time reveals his or her enemy. The latter views suffering as evil. As such, he or she does not affirm suffering, thereby not being able to affirm life that contains suffering either. Nietzsche identifies Christian existence as a counterpart of tragic existence. He contraposes Dionysus and the Crucified One.<sup>367</sup> On the one hand, there is tragic existence that pardons all suffering. On the other hand, there is Christian existence that brings an accusation against suffering-life. Christian existence claims that life is guilty and, therefore, must be justified, saved, and redeemed because otherwise it has no goal in itself. In Dionysus, life is justified; Dionysus affirms and legitimises<sup>368</sup> even the cruellest of suffering. It is an expression for the ultimate affirmation of life. Logically, pain is an expression of active life. Active life defies nicety. Life itself represents the saviour for the tragic hero. Life is sufficiently sacred; it does not need any justification. The incommensurability and ubiquity of suffering are not in need of justification.<sup>369</sup> Tragic existence defies the negative nature of reality. Existence is joyful, even vis-à-vis suffering. The critic-genealogist who views the tragic only from an aesthetic, non-moralistic, and non-evaluative perspective does not judge suffering.<sup>370</sup>

To the contrary, Christian existence regards suffering as a way to holiness, thus accusing suffering of negativity. Existence that includes suffering is guilty.<sup>371</sup> And, if existence is guilty, then it must have charges brought against it and be called to account. Nietzsche finds this charge against existence in the phenomenon of resentment. He even interprets resentment as a cultural tool.<sup>372</sup> Resentment finds its expression in culture as a revengeful instinct, an instinct to blame others for errors and defects, both at the psychological, historical, and metaphysical levels. According to Nietzsche, each reality is related to a certain will that serves to interpret it; in itself, existence is neither good nor bad. Guilt and innocence

Diethé, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

366 Friedrich Nietzsche, *Zrození tragédie* (Praha: Gryf, 1993), 114-119 and 126-134 [*The Birth of Tragedy from the Spirit of Music*, trans. Douglas Smith (Oxford: Oxford University Press, 2008)].

367 Cf. Friedrich Nietzsche, *Ecce homo* (Praha: Naše vojsko, 1993), 155 [*Ecce Homo: How One Becomes What One Is*, trans. R. J. Hollingdale (New York: Penguin Classics, 2005)].

368 "Every evil is pardoned..." See Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 51 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

369 Cf. Gilles Deleuze, *Nietzsche a filosofie* (Praha: Herrmann & synové, 2004), 30-33 [*Nietzsche and Philosophy*, trans. Hugh Tomlinson (New York: Columbia University Press, 2006)].

370 Cf. Friedrich Nietzsche, *Zrození tragédie* (Praha: Gryf, 1993), 191 and 187-194 [*The Birth of Tragedy from the Spirit of Music*, trans. Douglas Smith (Oxford: Oxford University Press, 2008)].

371 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 73-74 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

372 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 30 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

depend on the interpreting will that is independent, thence innocent. In the world of resentment we deny realities that do not correspond to our interpretation.<sup>373</sup> To the contrary, the world of a plurality of meaning is an innocent world.<sup>374</sup> Nietzsche traces innocence back to plurality (chaos), associating it with fatality. Life simply happens accidentally; the fatality of the eternal return strikes upon us constantly, with tragic existence affirming it (amor fati). On the background of Christ's story, Christian existence denies fatality. Zarathustra, as the child of a "lucky star," becomes a prophet of innocent existence.<sup>375</sup>

The active powers dominate in tragic existence. In Christian existence, conversely, the reactive powers have the upper hand. The reactive powers are dominant in resentment. Christianity is a religion of resentment. According to Nietzsche, it defies life. Nietzsche speaks about "inverting the perspective that establishes values."<sup>376</sup> Difference is perceived as a negative perspective. The reactive power, even if inferior, imposes limitations on the active power, forcing its spirit of negativity on the latter. Thus, it deforms the image of the active power, erasing the difference between the two. Nietzsche defines this reality of the inverted perspective using the principle that "difference engenders resentment";<sup>377</sup> based on this principle, mediocrity dominates and prevails in culture. Although the strong and active logically dominate over the weak and reactive, they need to affirm their dominance over the weak. Nietzsche, however, points out that the weak dominate over the strong in culture. As a result, culture becomes a culture of slaves because a slave does not cease being a slave, even if victorious.<sup>378</sup> This shift fissures the active powers, estranging them from their potential and turning them against each other. Social hierarchy is thus caused by a triumph of the reactive powers over the active powers. It is a triumph of laws, morality, the state, and institutions.

It is the source of resentment that Nietzsche associates with the nature of humanity, thence with the nature of culture.<sup>379</sup> Nietzsche interprets this cultural success of the reactive powers as a *disease* and *epidemic*. The latter must be radically cured through a *bliss of destruction*.<sup>380</sup> This epidemic has three dimensions. The first dimension is resentment in terms of an imaginary revenge. The second dimension is secret self-violation, or a guilty conscience, while the third is the ascetic ideal as a mode of everything hostile toward life.<sup>381</sup>

373 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 32 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

374 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 137 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

375 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 143 and 13 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

376 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 25 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].

377 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 164 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

378 Cf. Friedrich Nietzsche, *Soumrak model* (Praha: Votobia, 1995), 113-113 [*Twilight of the Idols: Or How to Philosophize with a Hammer*, trans. Duncan Large (Oxford: Oxford University Press, 1998)].

379 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 109 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].

380 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 98-99 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Ecce homo* (Praha: Naše vojsko, 1993), 98 and 121 [*Ecce Homo: How One Becomes What One Is*, trans. R. J. Hollingdale (New York: Penguin Classics, 2005)].

381 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 25, 67 and 96 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Antikrist* (Praha: Votobia, 1995), 37-38 [*The Antichrist*, 2nd ed., trans. H. L. Mencken (New York: Al-

The person of resentment is not capable of loving and admiring that which is admirable.<sup>382</sup> Such persons are passive; while they want to be loved, they are incapable of loving.<sup>383</sup> Their morality is slavish and utilitarian.<sup>384</sup> The "qualities" of such a person, such as selflessness, care, compassion or kindness, can only be recognized as such based on a hidden utility connected to the hidden recrimination of a third one. You are selfless because the other is greedy; you are greedy therefore I am good; I am good therefore you are bad.<sup>385</sup> "To emerge, the slave morality always first needs a world against and outside itself."<sup>386</sup> For Nietzsche, the one who embodies or personifies resentment, the subversion of values, is the priest who proclaims the beatitude of the weak, poor, pious, and powerless and the cruelty, sinfulness, greediness, etc. of the strong.<sup>387</sup>

Guilty conscience is the internalized shame for one's fortune, success, and power in a world full of suffering.<sup>388</sup> Guilty conscience is the resentment collapsed-into-itself that attenuates the joy of life; in its interiorized form it calls for self-sacrifice and self-denial. As such, it is an internalized pleasure in torment. Through shame, the power turns against itself, causing pain, this time not externally but internally.<sup>389</sup> The one who changes the direction of resentment from external to internal projection is the one who defines sin.<sup>390</sup> He or she turns accusation into self-accusation. Culture causes accusation and self-accusation, being the cause of all conflicts, torments, and bloodshed.<sup>391</sup> In resentment, one accuses; others are debtors vis-à-vis the accusing justice. In the case of a guilty conscience, one is a debtor and, at the same time, one living in resentment, that is, an accuser. One person stands against another; power measuring occurs.<sup>392</sup> According to Nietzsche, however, a previously locked need for liberation from all reactive powers of culture surfaces in the debtor-creditor relationship since both strive to break free from the bondage of drill.<sup>393</sup>

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- fred A. Knopf, 1924)].
- 382 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 169-172 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 383 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 25 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 384 Cf. Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 158-160 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].
- 385 Cf. Friedrich Nietzsche, *Radostná věda* (Praha: Aurora, 2001), 51 [*The Gay Science: With a Prelude in Rhymes and an Appendix of Songs*, trans. Walter Kaufmann (New York: Vintage Books, 1974)].
- 386 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 25 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 387 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 23 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Antikrist* (Praha: Votobia, 1995), 49-59 [*The Antichrist*, 2nd ed., trans. H. L. Mencken (New York: Alfred A. Knopf, 1924)]; Friedrich Nietzsche, *Ecce homo* (Praha: Naše vojsko, 1993), 142 [*Ecce Homo: How One Becomes What One Is*, trans. R. J. Hollingdale (New York: Penguin Classics, 2005)].
- 388 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 102 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 389 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 67-68 and 96 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 390 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 104-105 and 116 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 391 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 44 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 392 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 52 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 393 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 47-48, 60-62 and 71-72 [*On the Genealogy*

Ressentiment and guilty conscience have their origins in the yoke of the mechanical genealogy of culture. Culture becomes a servant of the reactive powers. This is the principle of universal history.<sup>394</sup> A culture that emerges based on the dominance of the reactive powers establishes and pursues the herd collectivity of humankind, characterized by sickliness and mediocrity. Mediocrity, caused by the dominance of the reactive powers, then discards everything that might transcend the borders of reactivity. Mediocrity aims at conservation and classification. The herd thus becomes the goal. The herd principle forms the weakness instinct. In the herd, guilty conscience finds its expression. Guilty conscience and resentment represent a kind of communicating vessels. In the herd, guilty conscience and revengefulness are redirected to the inside, so that they turn into resentment: “*Oh, how they are, deep down in their soul, ready to let others suffer! How they thirst to be executioners! The revengeful abound among them... constantly rolling the word justice on their tongues.*”<sup>395</sup> Thus, people become and remain a reactive community.<sup>396</sup>

### Conversion

Another key term connecting Nietzsche with Girard is conversion. We need to explore what Nietzsche means by this term. We are first going to reflect on the way Nietzsche perceives religion. For him, religion stands for everything that is genealogical, for morality, dominance, the triumph of the reactive powers and mechanical rigidity.<sup>397</sup> It is noteworthy that Nietzsche also regards the world of science as a religious world; for him, it is one of the forms of theology that is independent from the heart. The psychology of the scientist corresponds to the genealogical psychology of the priest.<sup>398</sup> The connection between science and religion is not merely accidental; religion is eventually replaced by morality that represents its genealogical successor. Both morality and religion then find their genealogical replacement in scientific knowledge.<sup>399</sup> Science focuses on causality and utility, neglecting the active element.<sup>400</sup> Science teaches thinking; it has bred hosts of reproducers: “*To learn how to think: they have*

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 of *Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 394 Cf. Friedrich Nietzsche, *Nečasové úvahy* (Praha: Oikymenh, 2005), 188-204 [*Unfashionable Observations*, trans. Richard T. Gray (Stanford: Stanford University Press, 1995)]. Also translated to English as *Untimely Meditations* and *Thoughts Out of Season*.
- 395 Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 101 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 396 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 112 and 30 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 61 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].
- 397 Of much interest is the fact that while Nietzsche repudiates Christianity as the high point of weakness and a representative of the reactive powers, he highly esteems Christ as one who affirms life, resisting the collective type of existence. Cf. Friedrich Nietzsche, *Antikrist* (Praha: Votobia, 1995), 67-79 and 88-92 [*The Antichrist*, 2nd ed., trans. H. L. Mencken (New York: Alfred A. Knopf, 1924)].
- 398 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 121-129 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 100-103 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].
- 399 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 133 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 400 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 16-17 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)]; Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 157-160 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].

*no idea about that at our schools anymore.*”<sup>401</sup> Nietzsche connects science and religion with culture that is, in his mind, a product of the reactive powers, as generative chewing.<sup>402</sup> And if Nietzsche emphasizes especially the active element, in which word corresponds to deed, then the scientific world is, for him, first and foremost, an image of the reactive element. For instance, a historian observes and evaluates history without, however, making it. Science and scientists participate in *genealogy*, assessing the origins of the powers from the perspectives of nobility and poverty.<sup>403</sup> This reveals the slavish nature of science, while expressing a certain need for nobility in the sense of outcomes, knowledge, sets of data, etc. In such a form of nobility, however, the slave prevails again: “*The need for nobility diametrically differs from the needs of the noble soul itself; it represents an utterly eloquent and dangerous symptom of the lack thereof.*”<sup>404</sup>

The world of religion and science, that is, the world of weakness and the reactive powers, will be, according to Nietzsche, oversaturated, suffocating its own lifelessness, rigidity, and weakness. Nietzsche provides us with the image of an exhausted God who choked Godself with compassion and died. This god was killed by the human being who could not bear God's gaze.<sup>405</sup> What was this gaze that the human being could not bear? The reactive human being could not bear the gaze of a moral god, a god of resentment. Resentment does not need God anymore; the person of resentment can be a god for him- or herself.<sup>406</sup> As a result, Christianity produces its own type of atheism. The atheistic replacement of God with the human (Feuerbach) is, in fact, no replacement at all; God persists, having been turned into the reactive life itself that produces its own universe of values. People redirected their resentment against God. God has died; the human being has now assumed God's place. Nevertheless, resentment and guilty conscience still persist. People continue viewing each other through the lens of resentment and guilty conscience.

It might seem that everything is over, that the human is a hopelessly reactive being. The human being is a disease, pus, an abscess on the Earth. He or she is not capable of affirming life.<sup>407</sup> Furthermore, the sick person also has a body that is sick. The body is a residence for the active powers that can affirm life. The affirmative power destroys the reactive powers by affirming neglect and destruction. Nietzsche even speaks of sacred affirmation, a sacred “Yes” that must be preceded by a sacred “No” of destruction.<sup>408</sup> The difficult becomes the easy, the low becomes the high, and, especially, pain and suffering become joy and bliss. In this way, the human enters the whole, completion, an “*abundance of life.*”<sup>409</sup> The human

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- 401 Friedrich Nietzsche, *Soumrak model* (Praha: Votobia, 1995), 94 [*Twilight of the Idols: Or How to Philosophize with a Hammer*, trans. Duncan Large (Oxford: Oxford University Press, 1998)].
- 402 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 224 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].
- 403 Cf. Friedrich Nietzsche, *Genealogie morálky* (Praha: Aurora, 2002), 40 [*On the Genealogy of Morality*, trans. Carol Diethe, ed. Keith Ansell-Pearson (Cambridge: Cambridge University Press, 1994)].
- 404 Friedrich Nietzsche, *Mimo dobro a zlo* (Praha: Aurora, 2003), 189 [*Beyond Good and Evil*, trans. R. J. Hollingdale (New York: Penguin Classics, 2003)].
- 405 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 217 and 220-223 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].
- 406 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 218 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].
- 407 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 109 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].
- 408 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 21 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)].
- 409 Cf. Friedrich Nietzsche, *Ecce homo* (Praha: Naše vojsko, 1993), 122 [*Ecce Homo: How One Becomes What One Is*,

thus becomes more of a human, a superhuman.<sup>410</sup> People of resentment also assent but their affirmation is false as it lacks the affirmation of the sacred No. In a herd shaped by the reactive powers, mere assent dominates.

### **Girard and negative anthropology**

Nietzsche strove to describe people, illuminating their nature. His thought is marked by a very unique anthropology *per negationem*. In the background of Nietzsche's negations of culture, there is affirmation, assent to whatever the human is and whatever he or she denies through culture. Nietzsche, like Hobbes, Hegel, Freud, and others, perceived the human as a being of desire. All these authors, however, differed in their interpretations of the origins of desire. In Hobbes, the human desire for recognition is rooted in the competitive struggle for power. In Hegel, similarly, there is also a desire for recognition but based on the master-slave dialectic; the measuring of powers is followed by one surrendering to the other until the "unhappy consciousness" is awakened and a new struggle breaks out. Freud links desire to the libidinous yearning for the status and privileges of the father. He finds the origins of religion and culture in the repudiated image of the father. The origins of religion are thus related to desire.

Nietzsche, too, touches upon the question of desire. He reflects upon one's contradictory desires, however, without regarding them as antinomies. Thus, he overcomes dialectics.<sup>411</sup> The human is defined by the power that is not neutral; it is a power in relation to other powers that interact with each other. Nietzsche refers to this interaction of powers as the will to power. One will affects another will. It either dominates or submits to the other will. A will longs for another will. It is not an issue of mere prestige; it is self-affirmation. In its difference from another will, a will affirms its difference. At the same time, the will that seeks its self-affirmation also commands and requires affirmation from other individuals. It is a process of overcoming; a conflict hidden inside culture. This conflict of superordination/subordination generates a hierarchical principle.

Here, we can see close proximity to Girard's mimetic theory. A desiring subject longs for another subject, or for its desire, or for the desire according to the other subject. At the same time, however, the two subjects come into a conflict in which they both seek to affirm their difference, while becoming ever more similar to their rival as the rivalry increases. To avoid escalation of the conflict, society establishes a hierarchy of relationships between the rivals by way of laws, norms, taboos, institutions, etc. While in Nietzsche the individual seeks to break free from the bondage of the reactive powers to become ruthlessly oneself, in Girard one yearns to become a role model for others; even more, the role model for one's own role models. The two principles are very similar – and both remain unfulfilled. The difference is that Nietzsche starts from the possibility of an autonomous subject, while Girard denies its autonomy. Girard dismisses Nietzsche's titanism of the autonomous subject, while accepting Nietzsche's intuition that is on to anthropological principles.

Nietzsche's noble individual (superhuman) affirms his or her difference, while denying, through the quality of his or her will, that which is different. That individual is goodness itself,

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trans. R. J. Hollingdale (New York: Penguin Classics, 2005)].

410 Cf. Friedrich Nietzsche, *Tak pravil Zarathustra* (Praha: Votobia, 1992), 69 [*Thus Spoke Zarathustra*, trans. Adrian del Caro, ed. Robert Pippin (Cambridge: Cambridge University Press, 2006)]. Cf. also Friedrich Nietzsche, *Zrození tragédie* (Praha: Gryf, 1993) [*The Birth of Tragedy from the Spirit of Music*, trans. Douglas Smith (Oxford: Oxford University Press, 2008)].

411 Cf. Gilles Deleuze, *Nietzsche a filosofie* (Praha: Herrmann & synové, 2004), 19-23 [*Nietzsche and Philosophy*, trans. Hugh Tomlinson (New York: Columbia University Press, 2006)].

regardless of anything and anyone. The superhuman is not good in relation to someone. The outcome of such affirmation is a sacrifice of the suffering of the weak. In Girard, the desiring subject, in fact, longs for the same thing: he or she yearns to be the indubitable good. However, his or her understanding of good is permanently derived, thus coming into conflict with those who yearn for the same thing. His or her conflicts never cease repeating the same pattern, derived from the sacrifice that occurred at the outset of culture. A similar logic of conflict also underlies the desire of Nietzsche's noble one. In both instances, the conflict must logically escalate. Something must happen.

In Nietzsche, there is a clash of the active and the reactive powers, in which the weak powers prevail, conquering the strong ones and generating the mechanisms of culture, resentment (accusation), and guilty conscience (self-accusation) through religion, morality, and science. Culture is generative. The reactive powers, the powers of the herd and mediocrity that affirm the dominant truths of the herd, then exterminate and level out everything that is unlike them, until reaching their most extreme consequences. At that moment, the hidden desire of the active powers is revealed to break free from the bondage, control, and utility. This arousal of the active powers is brought about by the affirmation of life in all its forms, including the non-evaluative affirmation of the tragic nature of existence with all expressions of suffering and pain related therewith. The reactive powers do not affirm life. Rather, they accuse life because they regard pain and suffering as evil. The active powers are related to unconsciousness; they are unintentional. The reactive powers are intentional but their intentions are always fake.

Girard, too, provides us with a generative image of culture in which a desire for the other's desire generates a desire for the other's desire, etc. Culture is founded on imitation. However, this imitation is not only acquisitive but also competitive and conflictual. Ultimately, the conflict escalates. That is when aggression is redirected to a certain subject or a group of subjects based on the scapegoat mechanism. This subject or the group of subjects is defined based on a generally accepted mechanism of stereotypization. A majority, a crowd, an anonymous power chooses and sacrifices its scapegoat. In this process, the mimetic individual is unaware of either his or her mimetism, or the mechanisms of stereotypization, thus being unaware of the innocence of his or her scapegoat either. Nietzsche's herd and Girard's crowd have a common denominator in the decisive role of the majority, mediocrity, and anonymous collectivity. In both cases, there are the mechanisms of stereotypization and accusation at work. However, the respective solutions differ. Sacrifice plays an important role in both cases. In Nietzsche, there is accusation based on the resentment mechanism. In the end, the sacrifice is a logical outcome of affirmation. In Girard, the sacrifice is at the origins of culture, with the subsequent accusation and victimization becoming a cultural mechanism. Both the resentment mechanism and the mimetic mechanism are, according to Girard, anthropological means to elucidate the biblical structure of original sin.

Nietzsche finds a solution in affirmation of suffering which, actually, presupposes one causing suffering to others. The active powers, the affirmative powers, are the powers that accompany unconsciousness; the individual does not evaluate good and evil. One must overcome weakness, compassion, and morality – that is, Christian existence. Girard finds a solution in affirming the mimetic mechanism: when one comes to realize (conversion) that one imitates and has always imitated. In such affirmation, there is also a dilemma of choice – whom and why one should follow. While unconscious mimesis always seeks victims (a parallel being here with Nietzsche's resentment), the realization of one's mimetism provides an opportunity to side with the victim, recognize his or her innocence, and follow Christ who always sides with victims. Girard calls it a paracletic mode of cultural grammar that an individ-

ual decides to follow. In the duel between Dionysus and the Crucified One, Girard sides with Christ in whom he perceives the only way how to step out from both the rivalry mechanism and the resentment mechanism. For Girard, Christ represents a valid possibility to affirm life without sacrificing the innocent.

### Myth versus Christianity

For Girard, culture consists of three fundamental levels or else of three overlapping stages. The first one is the mimetic mechanism that establishes the very dynamics of culture. The second is the persecutory scapegoat mechanism that is present in all cultures. Finally, the third level is, Girard asserts, related to the gradual cultural demystification of the persecutory and scapegoat mechanism, brought about by Jewish and, especially, Christian revelation. With regard to our topic, we are here going to explore the third stage because Girard was influenced by Friedrich Nietzsche when formulating it.

There are undoubtedly many resemblances between myths and the Bible. However, there is also a significant, even diametrical difference. Myth is an example of condemning the scapegoat. The Bible condemns the condemnation of the scapegoat.<sup>412</sup> Myths have their origins in sacrificing the scapegoat. They affirm the persecutors. In this respect, the Bible differs from myths since it affirms the scapegoat. Moreover, Christ even becomes a scapegoat on the account of his action, without demanding revenge. Thus, he puts into action God's love that finds its expression and basic cultural form in the Eucharist. "The condemnation of Jesus is a human act, not divine."<sup>413</sup> The gospels represent a break from mythological explanation. The God of the biblical message sides with the innocent victim. We clearly see that the gospels refuse persecution. "God's disapproval of sacrifice is an important anthropological trace."<sup>414</sup> The biblical position vis-à-vis myths establishes a contraposition between the gospels (novelistic truth) and myth (romantic lie). The human tends toward projection and false transcendence (religiosity). Since the latter is at the roots of culture, biblical revelation is necessary because it unmasks the false transcendence emerging from our conflictual desires.<sup>415</sup> The call to overthrow idols and live in truth, as presented by the Bible, corresponds to the rejection of false transcendence and recognition of the victim's innocence. Girard identifies revelation, especially the gospels, as a universal revealing power that deciphers and demythologizes the false religiosity of culture. The power of the gospel gradually eliminates the motives of the persecutory mechanism, deconstructing religion and culture. Jesus opposes the false transcendence of religion. By exposing the scapegoat mechanism, the persecutory mechanism is deprived of its symbolic power of the unawareness of the victim's innocence.<sup>416</sup> Before the introduction of Judaism and Christianity, the persecutory scapegoat mechanism

412 Jesus's attitude should be regarded as a strategy aimed at overcoming all forms of scapegoating. Cf. René Girard, *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978), 157ff [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)].

413 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 89 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

414 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 82 and 81-89 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

415 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 79 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

416 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 117 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

was accepted and legitimized especially because it was regarded as no mechanism at all. "The victim's innocence is a substantial contribution made by Christianity."<sup>417</sup>

Girard's theory represents a radical critique of the crowd. The manipulated mass needs scapegoats. The mimetic captivation of the crowd flows into collective obsession. In the passage about the casting out of evil spirits in the land of the Gerasenes, the reader of the Gospel of Mark learns that the evil spirit is a multitude, in spite of speaking as an individual. In response to Jesus's question about the name of the evil spirit that controlled the possessed person, the spirit replied: "My name is Legion; for we are many" (Mk 5:9, NRSV). The word "legion" refers to a hostile horde of warriors, an army led by a single spirit, and also the executioner of Christ's crucifixion. When Girard elucidates the nature of evil, he remarks that, in the gospels, evil is always associated with a multitude, the crowd. He cites Kierkegaard's words that "the crowd is a lie."<sup>418</sup> In the text, this evil spirit (a multitude, the crowd) is associated with the image of a herd of swine that ultimately rushes down the steep slope into the sea. The herd of swine refers to Matthew's text about the swine that trample the pearls and can even turn and maul us (Matt 7:6). "The herd mentality... turns a group... into a herd; in other words, it is an irresistible tendency toward mimetism." Girard speaks of the herd mentality as a "fashion to jump into an abyss" of the persecutory mechanism.<sup>419</sup> Conversely, the gospels portray Christ as a shepherd who sets off to search for a lost sheep, leaving ninety-nine others alone. That is an antithesis of the mentality that is willing to sacrifice an individual for the sake of all. In the parable of the wicked tenants, the stone that the builders rejected (scandalon) became the cornerstone (Matt 21:42); in the prologue of the Gospel of John, the Word about truth is rejected by those to whom it has been sent as a scandalon. In both cases, there is an inversion of myth. The God of the gospels is never one of the persecutors. Jesus's death represents a moment of glory, a symbolic disclosure of God's identity. God's countenance is revealed as the Lamb of God.<sup>420</sup>

Myths tell a story from the perspective of a victorious lyncher, from the perspective of the crowd. The biblical text is, Girard suggests, true as much as it "negates myths that... always approve of the scapegoat mechanism."<sup>421</sup> The biblical text is a radical critique of the crowd, that is, collective mimesis and the contagion of violence. The reason for Peter's denial, Pilate's behaviour, the impenitent thief's attitude, and the fear of the disciples who run away is their agreement with the crowd. Christ is all of a sudden *hated for no reason* when everyone begins to imitate the crowd of his enemies.<sup>422</sup> This reality is most eloquently unmasked by Caiaphas's line in the Gospel of John: "You do not understand that it is better for you to have one man die for the people than to have the whole nation destroyed" (Jn 11:50,

417 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 100 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

418 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 197 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

419 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 207 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

420 Cf. René Girard, *Des Choses cachées depuis la fondation du monde* (Paris: Grasset, 1978), 274 [*Things Hidden Since the Foundation of the World*, trans. Stephen Bann and Michael Metteer (Stanford: Stanford University Press, 1987)]. Cf. also Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 92 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

421 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 84 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

422 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 88 and 92 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

NRSV). Other priests listen to Caiaphas's words and think something like "well, yes, that is right, it is indeed better to have one person die for the people than to have the whole nation destroyed." In John's text, this implicit reality is disclosed by the following sentence: "Jesus was about to die for the nation, and not for the nation only, but to gather into one the dispersed children of God. So from that day on they planned to put him to death" (Jn 11:51b-53, NRSV). Caiaphas's reasoning is logical and convincing; it "captivates" and mobilizes others. Subsequently, the doubts of the priests disappear, triggering the effect of crowd unification and the scapegoat effect.<sup>423</sup> This passage provides, according to Girard, an important disclosure or revelation "of the crisis of all persecutory images... the gospels do not emphasize unanimity to bow down to it and to conform to its verdict, like all mythological and political... texts do; they emphasize it to reveal it as complete error, an untruth... usually the legal authorities have the upper hand over the crowd; in a time of crisis, it is the other way around... the legal authorities then join the crowd."<sup>424</sup>

The anonymous, impersonal crowd is also related to the one who plays the role of the accuser in the scapegoat process. The crowd is false transcendence; it is a lie that leads to the scapegoat mechanism. In the Gospel of John, it is the devil who is described as a liar and a murderer from the beginning (Jn 8:44). In Hebrew, the word "satan" means *accuser*, *incriminator*; in the Septuagint it is translated as *epiboulos* (treacherous) and *ho diabolos* (calumniator, slanderer).<sup>425</sup> The devil and the crowd overlap: "To be a devil's follower means to go with the crowd against an innocent victim, no matter what the cause is."<sup>426</sup> According to Girard, this reveals the true nature of the crowd: the devil is a name for the unanimous crowd that mercilessly chooses its victims, accusing and killing them. Christianity discloses the mimetic nature of humankind and culture. Mimeticism is an inherent and inseparable aspect of culture. However, one can choose whom to follow. Girard's position is not pessimistic. Rather, it is characterized by rigorous realism, asserting that "an escape from mimetic captivity is difficult and uncertain," yet not impossible.<sup>427</sup> "Christianity should not believe in the devil... We will never be free from mimesis but it does not have to be one of a satanic type... We do not have to accuse our neighbour; we can learn to forgive them."<sup>428</sup> We can accept the mimetic nature of the Christian replacement of the sacrificial system: to love one's neighbour as oneself. The individual is not at the mercy of mimetic desire. The option to resist the mimetic mechanism depends on the imitation of Christ or somebody who imitates Christ (1 Cor 4:16). Present here is the mimetic polarity of the devil versus Christ (Jn 16:8-11). We are free not because we have authentic desires (old myths were replaced by the myth of progress and modern superiority, the myth that humankind liberated itself through its own will) but because we can always convert; we can acknowledge that we persecute someone, we can realize

423 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 129-131 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

424 René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 132 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

425 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 223 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)]. Cf. also René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 80 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

426 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 103 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

427 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 117 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

428 René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 106 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

that we have always unintentionally emulated bad role models.<sup>429</sup> The conversion of Paul, who had been a zealous persecutor and approved of the killing of Stephen (Acts 8:1), was brought about by the realization that he was wrong to engage in the persecution. Both Christ and the devil call for imitation (*imitatio*).<sup>430</sup> Christ recommends that people imitate him, and not their neighbours, to be saved from mimetic rivalry and the scapegoat mechanism. God and humankind are not in a relationship of mimetic rivalry.<sup>431</sup> The final word of the Decalogue summarizes all the other commandments when it forbids coveting everything that belongs to another. If trespassed, the consequences include crimes against one's neighbour: murder, adultery, theft, defamation (Ex 20:13-16). The gospels say the same thing with the difference being that they do not command but rather call on to follow Christ.

In history, a victim not only has an accuser but also an advocate. To describe the role of the Holy Spirit, the gospels use the legal term *paraclete*. The paraclete was called to the defendant to speak on his or her behalf. In the gospels, the Paraclete is a "universal advocate of all innocent victims and a destroyer of all persecutory fantasies." It is the Spirit of truth (Jn 14:16-17) that speaks on behalf of the defendants at the court (Mk 13:11). It is in this Spirit that the disciples are to bear witness so that they do not fall prey to mimetic persecutory rivalry (Jn 15:23-27 and 16:1-4). This Spirit, the Advocate, is promised to come to the disciples as the one who will gradually reveal to them the realities they cannot yet see. The Paraclete goes through history, revealing the hidden truth about the scapegoat mechanism.<sup>432</sup> Even though modern history can be defined as a series of ever deeper mimetic crises, the persecutory fantasies gradually weaken and collapse. It is important to realize that while it took several centuries to demystify a number of persecutory stereotypes in the past, a few years suffice to discredit persecutors today.<sup>433</sup> It is the Paraclete who is at work in hiding in the roots of culture.<sup>434</sup> "The gospel message has the power to successfully transform the world and free it from the scapegoat ideology..."<sup>435</sup>

429 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 103-105 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)].

430 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 81 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)]. Cf. also René Girard, *Je vois Satan tomber comme l'éclair* (Paris: Grasset, 1999), 61 [*I See Satan Fall Like Lightning*, trans. James G. Williams (Maryknoll: Orbis Books, 2001)].

431 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 57 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)]. Cf. also Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 80 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

432 Cf. René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 233-238 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

433 Cf. René Girard, *O původu kultury. Hovory s Pierpaolem Antonellem a Joãem Cezarem de Castro Rocha* (Brno: CDK, 2008), 77 [*Evolution and Conversion: Dialogues on the Origins of Culture* (London: Bloomsbury, 2008)]; cf. also René Girard, *Obětní beránek* (Praha: Mladá fronta, 1997), 227 [*The Scapegoat*, trans. Yvonne Freccero (Baltimore: The Johns Hopkins University Press, 1986)].

434 Cf. Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 115 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

435 Michael Kirwan, *René Girard. Uvedení do díla* (Brno: CDK, 2008), 125 [*Discovering Girard* (London: Darton, Longman and Todd, 2004)].

### Conclusion

The postulates of thought of Friedrich Nietzsche and his followers no doubt remain exceptionally influential and impressive in the current academic discourse in the humanities. From the perspective of openness and attempts to go beyond nihilistic epistemology, we often face the unwavering hermetic incommunicativeness vis-à-vis the metaphysical discourse. The cultural anthropological approach of René Girard's mimetic theory, however, quite unexpectedly opens space from within nihilism to pursue a non-confrontational structural analysis of the fundamental postulates of the nihilistic notion of emancipation of the individual. Thus, it simultaneously creates space for reevaluation of the structural difference between myths and the gospels without necessarily having to first accept the metaphysical point of departure. It is the structural difference between myths and the gospels that Friedrich Nietzsche was aware of as arguably one of the first representatives of the hermeneutics of suspicion. Girard deepens his structural analysis, thanks to which he discovered the methodology of the gospels as an absolutely unique socio-cultural anthropological theory and an exceptionally revealing explanatory tool to be employed in a variety of the humanities.

### AUTHOR CONTRIBUTIONS

The mentioned author significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

The author declares that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, the author declares that there is no conflict of interest related to this article or its review.

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## STRENGTHENING THE PERCEPTION OF CHRISTIAN VALUES IN THE POST-COVID ERA ON THE BASIS OF SIGNIFICANT HISTORICAL EVENTS: THE CONGREGATION OF SISTERS OF MERCY OF THE HOLY CROSS AND THEIR FUNDAMENTAL INFLUENCE ON THE DEVELOPMENT OF NURSING EDUCATION IN SLOVAKIA



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### Abstract

**Background:** The congregation of the Sisters of Mercy of the Holy Cross are present in Europe (Austria, Czech Republic, Croatia, Germany, Kosovo, Romania, Serbia, Slovakia, Slovenia, Switzerland, Hungary), the Americas (Brazil, the United States), Asia (India, Taiwan), Africa (Uganda) and in Perm, Russia. In cooperation with local authorities and people of good will, the sisters do everything in their power to introduce into the life of local communities an awakening from indifference and lethargy, which can then set in motion processes leading to a new society based on peace, love and justice. They support efforts aimed at common harmony and respect for human life and dignity. In recent times the sisters have begun to fight the new phenomenon of human trafficking, particularly in poor countries. Their involvement in the battle against unemployment, lack of education, economic backwardness, the blind desire for urban life, the loss of traditional livelihoods and the extinction of local cultures is also very important. The Congregation of the Sisters of Mercy of the Holy Cross succeeded in founding the first nursing school in Slovakia. Its establishment by the Congregation of the Sisters of Mercy of the Holy Cross in Bratislava marked the birth and development of professional nursing education in Slovakia.

**Conclusion:** The implementation of similar studies can significantly strengthen the perception of Christian values and their influence on life in the post-COVID era. It also serves as psychological and spiritual support in preparation for further pandemics.

**Keywords:** Sisters of Mercy of the Holy Cross – Historical mission – Nursing school – Christian values – Post-COVID era.

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### Introduction

The congregation of the Sisters of Mercy of the Holy Cross, an international Roman Catholic women's religious order, was founded in 1856 in Ingenbohl, Switzerland, by the Capuchin Theodosius Florentini Ofm. Cap. (1808 – 1865)<sup>437</sup> together with Sister Maria Theresia Scherer (1825-1888), and is still faithful to the original intention of the founders. It meets the needs of the times and desires, in accordance with God's exact purpose, to renew society through Christ's cross and his resurrection. At the same time, it wants to be a reflection of Christ's light for today's world and through knowledge and action of God's will to bring God's Kingdom to places where people are suffering along with hope for a better future through faith. The Institute of the Sisters of Mercy of the Holy Cross is a religious community that is approved by the Church and characterized by charisma focused mainly on charitable, social and pastoral services in the intention and spirit of the founders, who adapted each activity to the requirements of the time.<sup>438</sup>

For this reason, the sisters work in hospitals, retirement homes and other health care facilities; their service is further expanded by means of a network of nursing schools. In mission territories, this is done through systems of health insurance for villagers, mobile medical services, school health care programmes, participation in government projects, the building of AIDS care units, palliative care, etc. The sisters also organize health care in hospitals and health centres, operate free field hospitals, offer clinical counselling, provide comprehensive care for terminally ill patients in households and mobile medical services in municipalities, work in a home health care service and are devoted to many other people who depend on the help of others.

The sisters also devote themselves to educational work on all levels, from nursery school to higher education, to teacher training, to running vocational retraining courses and to managing development projects aimed at improving the situation of women in mission areas, etc. They also collaborate with local parish teams on the faith-formation service and work in a school and parish catechesis. The Sisters of Mercy of the Holy Cross serve orphans, the elderly, the homeless, HIV-affected children, girls and women on the street, the physically and mentally handicapped, women and girls who have been trafficked, prisoners and others, regardless of their social status, confession or religion.

The Sisters of Mercy of the Holy Cross are present in Europe (Austria, Czech Republic, Croatia, Germany, Kosovo, Romania, Serbia, Slovakia, Slovenia, Switzerland, Hungary), the Americas (Brazil, the United States), Asia (India, Taiwan), Africa (Uganda) and in Perm, Russia.<sup>439</sup> In cooperation with local authorities and people of good will, the sisters do everything in their power to introduce into the life of local communities an awakening from indifference and lethargy, which can then set in motion processes leading to a new society based on peace, love and justice. They support efforts aimed at common harmony and respect for human life and dignity. In recent times the sisters have begun to fight the new phenomenon of human trafficking, particularly in poor countries. Their involvement in the battle against unemployment, lack of education, economic backwardness, the blind desire for urban life, the loss of traditional livelihoods and the extinction of local cultures is also very important.

437 Mojmir Hauptvoglová, *Dejiny Slovenskej provincie Milosrdných sestier Svätého kríža* (Trnava: Lúč, 2008), 17.

438 *Pravidlá života Milosrdných sestier svätého Kríža, Regula, Konštitúcie, Generálne pokyny*, 71.

439 Renata Pia Venzin, Ingenbohl (Schwesterninstitut). in *Historischen Lexikon der Schweiz*. [www.hls-dhs-dss.ch/textes/d/D12127.php](http://www.hls-dhs-dss.ch/textes/d/D12127.php).

### **Historical mission of the Congregation**

The founder of the Congregation of the Sisters of Mercy of the Holy Cross, Father Theodosius (1808 – 1865), real name Anton Krispin Florentini, was a member of the Capuchin order and a vicar general of the Chur diocese in Switzerland.<sup>440</sup> With the help of his sister Bernarda Heimgartner, he founded the Congregation of Teacher Sisters of the Holy Cross of Menzingen in Altdorf, Switzerland. His intention was to organize scholastic education, especially the education of women, and help for the poor. Theodosius laid the foundations of the Holy Cross Hospital in Chur, Switzerland, and invited the sisters to care for the sick there;<sup>441</sup> thus, the Congregation of the Sisters of Mercy of the Holy Cross was established, with the mother house in Ingenbohl, and Maria Theresia Scherer<sup>442</sup> became its first general superior. Father Theodosius and Mother Maria Theresia built the Congregation with the intention that its members serve God through a common life, striving for Christian perfection by preserving the three Evangelical counsels, and further the apostolate consisting of school administration, caring for the poor and sick, and showing Christian love in their country or in missionary territories.

Maria Theresia came to better know what is today Slovakia at the time when the nobility and wealthy estate owners demanded in the 1860s that the Sisters of the Holy Cross work in their villages as nurses and teachers. The actual settlement of the Sisters of the Holy Cross in Slovakia occurred in 1865, and Zlaté Moravce became the oldest branch of the Sisters of Holy Cross, where two years earlier the head physician of the Tekov County, Ľudovít Benkő, pointed out the very poor health and social conditions in the county.<sup>443</sup> Later, the activities of the sisters of the Holy Cross spread to the whole of Slovakia.

### **The idea of founding a nursing school and its reasons**

At the beginning of the twentieth century, nursing was not a socially accepted profession. Professionally educated and qualified nurses were not required in the health and social care system. The organization of the nursing service was not granted sufficient importance until after the founding of the Czechoslovak Republic. The primary reason for the lagging behind of nursing care was the insufficient professional education of nurses. The situation began to change in the 1930s and 1940s, when the poor health state and social relations of the population, not only in the Czechoslovak Republic, required professional nursing care.

The founding of nursing schools was a reaction to the increased need for qualified graduate nurses in clinical practice. Nurses began being required to be professionally trained and capable of providing qualified nursing care. Nursing as a profession began to be perceived as a socially desirable profession that required a completed professional education in nursing schools. The goal of nursing schools was to educate certified nurses who would be capable of working in various types of medical facilities, e.g. in hospitals, medical institutions, maternity wards as well as in clinics.

The increase in nursing personnel was caused by the founding of nursing schools and an increase in the number of professionally educated graduates of nursing schools – certified nurses. Nevertheless, the number of certified nurses still remained insufficient. For this rea-

440 Hauptvoglová, "Dejiny Slovenskej provincie Milosrdných sestier," 17.

441 Province of the Capuchins in the Czech Republic [http://www.kapucini.cz/index.php?option=com\\_content&view=article&id=42:theodosiusflorentini&catid=62&Itemid=141](http://www.kapucini.cz/index.php?option=com_content&view=article&id=42:theodosiusflorentini&catid=62&Itemid=141).

442 Maria Theresia Scherer (31 October 1825 – 16 June 1888) was declared as beatified in 1995.

443 Rastislav Řeháček and Bedrich Šimko, *120 rokov nemocnice v zlatých Moravciach* (Topoľčany: Prima Print, 1995), 22.

son, a need arose in the Czechoslovak Republic to establish additional nursing schools along with the need for the uniform education of certified nurses. In the period of the first Czechoslovak Republic, public health care and overall health care underwent complex development. New conditions were created for solving problems, of which there was an enormous number, mainly in the field of health and social care, as well as ensuring the education of medical staff. The problem above all was a lack of financial resources.

As early as in 1926 provincial superior sr. Theodosia began to address the need to establish a nursing school in Slovakia. She was very close to education and specifically to nursing education, because from 1907 she worked for fifteen years as the head of the nurses at the State Hospital in Bratislava. Sr. Fides Dermeková satisfied the language and personal prerequisites for the preparation and management of the school, and so on 19 July 1927, the superior entrusted her as the organizer of the planned nursing school of the Congregation of the Sisters of the Holy Cross in Bratislava. Sr. Fides handled the task energetically and thoughtfully, organizing the opening of a nursing school with the beginning of teaching in the school year 1931/32.

### **The beginning of a nursing school and methods of education**

Before the opening of the first school year it was necessary to prove fulfilment of requirements regarding the theoretical and practical activities of the future nursing school to the Ministry of Public Health and Physical Education. One of these requirements concerned the need to declare the premises as suitable for the temporary placement of the school, since no appropriate permanent premises were available. A provincial house of the Sisters of the Holy Cross, located at No. 27 on Hviezdoslavovo Square in Bratislava, was renovated in the summer of 1931 to serve the purpose.<sup>444</sup>

Twelve sisters of the Congregation of the Sisters of Mercy of the Holy Cross and three sisters of the Congregation of the Sisters of Mercy of St. Vincent from Rožňava enrolled for the first year at the nursing school. Other congregations were interested in studying at the nursing school, too, but their members did not have the appropriate level of education. In October 1931, the director of the school, Doc. Valach from Prague, brought verbal information about permission to open the school even without written approval of the Ministry of Public Health and Physical Education in Prague. The document was to be delivered to the Congregation later.<sup>445</sup> The Ministry then approved the opening of the school on 1 November 1931, including the schedule of practical training and with Doc. Valach as its professional director. Sister Fides Dermeková was entrusted with the task of managing the school, with the assistance of Sister Andrea Ciastonová, who had passed the exam of teaching competence. Both had attended a nursing school in Prague.

The solemn opening of the nursing school of the Congregation of the Sisters of Mercy of the Holy Cross took place on 2 November 1931. It was an unofficial beginning, when the director met the employees for the first time in the school's staff room. Provincial superior Sister Teodózia participated in the opening, accompanied by provincial prefect Sister Adela Stögerová. The inauguration of the nursing school in Bratislava was also a significant event

444 The renovation cost 54,000 Czechoslovak crowns and additional small repairs 12,000 crowns. Reconstruction of the building started on 1 July 1931 and ended in September of the same year. Builder Štefan Elefanti, from the building company Weisz and Elefanti, was commissioned for the job. A telephone service was established in the building and the lecture hall was provisionally equipped.

445 Written approval of the Ministry of Public Health and Physical Education in Prague regarding the opening of the nursing school was delivered to the directorate of the State Hospital in Bratislava on 23 October 1931.

for the Slovak province of the Congregation of the Sisters of Mercy of the Holy Cross in the context of the celebrations of the 700<sup>th</sup> anniversary of the death of St. Elizabeth, patroness of the Slovak province of the Congregation.<sup>446</sup>

Female candidates (and later also male ones) for the study of nursing had to meet rather strict conditions: they had to be 16 – 30 years of age, graduates of a burgher school or have certain additional education. The combination of a burgher school and a two-year family or business school proved to be the best. In regard to physical condition, emphasis was put on *appropriate physical proportions, accurate development and normal physical foundation*.<sup>447</sup> When it came to mental condition, the Congregation accepted only its own members whose character was “suitable for nursing of the sick”, which had been tested by previous hospital service. Regarding applicants from the civil arena, the directorate sought information from the directors of the schools that the candidates had attended in the past.

Fifteen students aged from 18 to 27 were admitted to the first school year, and lessons commenced on 4 November 1931. The greatest medical professionals of the era started to teach at the school. The first lectures, given by Professor Zdeněk Frankenberger,<sup>448</sup> concerned the subject of anatomy. Professor Stanislav Ružička<sup>449</sup> gave the lectures on hygiene. The Congregation insisted that all other subjects at the nursing school must be taught by professors, docents and assistants from the Faculty of Medicine of Comenius University in Bratislava, as well. Lectures on pathology and physiology took place at the beginning of December 1931. Physiology was taught by Professor Vilém Hons<sup>450</sup> and pathology by Professor Jan Lukeš.<sup>451</sup> The superiorate of the Congregation applied for permission to perform practical training in the institute’s kitchen.

In the first year, students focused mainly on theory, with the exception of the practical training of nursing methods and massage as well as various physiotherapeutic interventions, but not directly with patients. The two-year school tuition was 200 crowns per month. Students had to pay 300 crowns monthly for residence in the dormitory. The amount covered accommodation, meals and electricity. Scholarships were not provided and there was a three-month trial period. During the second year, practical education prevailed over theory: 20 hours were dedicated to public health and medical training, 15 hours to administration, 20 hours to the history of nursing and ethics and 10 hours to civil education. Students had to undertake a three-month practical training course, in which they worked in a medical ward, a clinic, in physical

446 *Kronika ošetrovateľskej školy milosrdných sestier sv. Kríža 1931 – 1943* (Trnava, the archives of the Congregation of the Sisters of Mercy of the Holy Cross, record from 1931), 29.

447 “Kronika ošetrovateľskej školy milosrdných sestier sv. Kríža 1931 – 1943 (Trnava, the archives of the Congregation of the Sisters of Mercy of the Holy Cross, record from 1931),” 29.

448 Zdeněk Frankenberger (1892 – 1966), a graduate of the Faculty of Medicine of Charles University in Prague, who taught at the Faculty of Medicine of Comenius University in Bratislava in years 1922 – 1939. He was a specialist in physiology and embryology and wrote several books and over 200 expert studies.

449 Stanislav Ružička (1872 – 1946), a Czech professor of hygiene. At the beginning of the 1920s he was a dean and vice-dean of the Faculty of Medicine of Comenius University in Bratislava. In the years 1920 – 1938 he led the Institute for Hygiene in Bratislava, and he was also a founder of the science of the appropriate physiological way of human life – eubiotics.

450 Vilém Hons (1890 – 1969), a Czech professor of physiology of nutrition who explored nutritional values of food and their impact on human health. He was in charge of leadership of the Institute of Physiology of Comenius University between years 1930 – 1938. Along with scientific literature, he also wrote popular manuals about the rules of nutrition.

451 Jan Lukeš (1885 – 1958), a Czech pathologist and immunologist. Between years 1927 – 1938 he presided over the Institute of Pathological Anatomy, Histology and Bacteriology of the Faculty of Medicine of Comenius University in Bratislava.

therapy, a laboratory, patients’ rooms and the department of contagious diseases. They spent another three months in a surgical ward—clinic, an operating theatre and patients’ rooms. After that, the students continued by gaining experience in a children’s clinic: four weeks in a neonatal department, two weeks in a dietetic kitchen and two weeks in a paediatric ward. And finally, there were four weeks of practice in an ophthalmic clinic, two weeks in a gynaecological ward, two weeks in otorhinolaryngology and the same length of time in a dermatological clinic. Students were supervised by the chief nurses of every section or department.

The first year’s lectures at the nursing school ended on 28 June 1932. Afterwards, the Sisters of the Holy Cross helped in hospitals and candidates travelled home for a short holiday. At the beginning of August 1932, the students were allocated to several clinics of the State Hospital in Bratislava for practical training.

At the end of August 1932, new students were admitted to the nursing school after a thorough medical examination. Ten members of the Congregation of the Sisters of Mercy of the Holy Cross, two Franciscan sisters and three civil students began their first school year at the nursing school on 1 October 1932. The school had its own well-equipped and modern auditorium, but the students could also use lecture halls of the respective clinics and institutes of the Faculty of Medicine of Comenius University. They practised in the departments of the clinic on Mickiewiczova Street and the Paediatric Clinic on Jakub’s Square. The school had its own classrooms, laboratories and reading rooms and it gradually equipped a cabinet with facilities for nursing techniques and scientific libraries.<sup>452</sup> Clinical preparations, anatomic pictures and the library were used during the lectures.

The first leaving diploma exams took place on 12–13 June 1933 on the basis of order No. 111.862/11/1933 of the State Office in Bratislava. Students were given a four-week educational leave before taking the exams. Their knowledge was examined by five professors: Vilém Hons, paediatrician Alojz Chura, chief doctor Alexander Baranský, Ľudovít Valach and Konštantín Čársky. The theoretical and practical examination of the post-natal nursing of babies and children’s diseases took place on 12 June 1933. This was followed by a practical exam of the techniques of nursing and surgery. During the difficult theoretical exams, students answered questions regarding anatomy, physiology, nursing techniques, internal medicine and dietetics, pathology, infection medicine, pharmacology, surgery, gynaecology and obstetrics, otorhinolaryngology, as well as the questions on the topic of infancy and children’s diseases, administration, public healthcare and social care, hygiene and civil education.<sup>453</sup>

Thanks to the well-considered, widely combined and methodically elaborate system of education under the practical guidance of Sister Fides, graduates of the nursing school obtained a respected status that enabled them to find employment not only in state, district and municipal hospitals, but also in the private sector. They were wanted because of their experience

452 Archive sources reveal information about various study texts that were available to students and teachers of the Nursing School of the Sisters of the Holy Cross at the institutional library. Catalogues of the nursing school from years 1933 – 1945 contain the inventory of the teachers’ and students’ library. The students’ library, which kept the materials necessary for education, included 50 items; the teachers’ library contained 28 items. There are notes on how a specific book became a part of the library. Most of them were donated or funded from advance payments. Apart from the material for study, the library contained various books about natural sciences and historiography, but one could even find works written by Martin Kukučín. However, we can see from the list that the availability of proper study materials was very poor. The literature was basically orientated on titles available in the Czech and Slovak languages. The enclosure contains a summary with book items from the field of nursing. The listed books represent a summary of the items in the students’ and teachers’ libraries.

453 The process and results of the exams were recorded in the protocol of the Ministry of Internal Affairs of the Slovak Republic, State Archive in Bratislava, fund of the Nursing School in Bratislava, inf. No. Š 6668.

and practice in surgical theatres.<sup>454</sup> They were known by the typical symbol of professional nursing badges,<sup>455</sup> which they received along with their diplomas after a successful leaving exam.<sup>456</sup> The work of nurses after finishing the nursing school extended from institutional and hospital care to preventive social care, with a special focus on children and visiting service in families.<sup>457</sup> They were employed by the clinics of the State Hospital in Bratislava, district hospitals in Slovakia, social institutions and sanatoria.

The founding and functioning of the school arose from the need for the unified quality education of certified nurses at nursing schools. The topic resonated not only on the level of individual states after the disintegration of Austria-Hungary but also within the framework of the European professional education in the field of nursing.<sup>458</sup> Solving the issue of education in the field of nursing after the end of the First World War was at the centre of attention not only on the level of meetings of representatives of nursing schools, but also during professional events of certified nurses in the newly founded Czechoslovakia. The records from these meetings offer interesting and comprehensive material on the problems related to nursing education in the region of contemporary Bohemia, Moravia and Slovakia.

At the beginning of the nursing school of the Congregation of the Sisters of Mercy of the Holy Cross in Bratislava, as well as during the following years of its existence, the various difficulties encountered by all existing nursing schools in the first Czechoslovak Republic can be observed. The problems concerned the insufficient number of nursing schools, which were unable to meet the demand of clinics and departments in various types of hospitals after the disintegration of Austria-Hungary,<sup>459</sup> the inconsistent educational synopses, the imbalance

454 They served e. g. in surgical theaters of the Trnava Hospital, where they trained other nurses. See: Ľubica Ilievová and Erika Juríková, *Pôsobenie Milosrdných sestier Svätého kríža v chirurgickej operačnej sále Trnavskej nemocnice v kontexte dejín ošetrovateľstva* in *Studia Capuccinorum Boziniensia II. Kraków: Towarzystwo Słowaków w Polsce* (2016): 88 – 99.

455 When nurses with diplomas signed a written vow to make their services available for at least three years in the case of war, epidemics and other extensive diseases and to obey the orders of military office or public healthcare office, they were allowed to carry a badge of honour on the basis of §11 and §12 of the Regulation of the Ministry of Internal Affairs on nursing of the sick, page 743, valid from the 25 May 1914 (The Imperial Code for the Kingdom and countries represented by the Imperial Council). Before the founding of the first Czechoslovak Republic in 1918, the badge of honour belonging to nurses with diplomas was decorated with an Austrian eagle. After the establishment of the republic, there was a requirement to have the badge decorated with a state symbol of the republic within the procedure emerging from the law dated 30 March 1920, Coll. No. 252 containing regulations on the state flag, the state coat-of-arms and the state seal.

456 Vlastimil Kozoň et al., *Ošetrovateľstvo – 50 rokov univerzitného vzdelávania na Slovensku* (Wien : ÖGVP Verlag, 2012), 18.

457 *Lemon 1: Učebný materiál pre ošetrovateľstvo* (Bratislava, 1997), 45.

458 An international congress of Catholic nurses took place in Rome on 25– 28 August 1935 with participation of over 2,000 religious and secular nurses, including Sister Fides Dermeková. The congress focused on three main points: the apostolate of nursing, the professional education and training of nurses and the unification of collaboration with secular nursing. Participants emphasized the need for an elaborate professional education of certified nurses. Pope Pio XI spoke to the nurses and a long excerpt of his speech was written into the chronicle by Sister Fides (pages 174 – 193). We find a reference to his death on 10 February 1939 in the Chronicle of the nursing school: "It is a loss that touches emotionally every Christian soul." In *Kronika ošetrovateľskej školy milosrdných sestier sv. Kríža 1931 – 1943* (record from 1939).

459 By the end of 1932, 494 students had graduated from the Czech State Nursing School, 368 students from the German State Nursing School and 249 students from religious schools. According to statistics from 1931, approximately 7,700 persons worked in hospitals and healthcare institutions who were engaged in providing nursing services to the sick. About 650 nurses out of this number were certified. See Olga Andělová, „Situácia zpráva o československém ošetrovatelství“ in *Československá nemocnice*, 1933, 3 (6):138 – 139.

between theory and practice, differences in the division of time dedicated to theoretical and practical subjects and the varying or complete lack textbooks for the respective educational subjects. The situation was also complicated by the absence of a legal norm that would precisely define the subjects of education at existing nursing schools in the Czechoslovak Republic. The requirements of minimum education and age for admission to nursing schools differed as well.

In the first decade of existence of the nursing school in Bratislava, several problems associated with nursing education emerged, mainly management on the national level, and the resolution of all questions related to the issue of nursing. A department newly established by the Ministry of Health was supposed to resolve as a priority the unification of curricula and subjects, along with the publication of school books for nursing schools, because the subjects were determined only roughly as some sort of an educational framework. This meant in practice that the subjects were taught at varying lengths and depths. Some nursing schools emphasised practice, while others focused on theory. The educational materials and methodology of nursing needed to be consistent in their fundamentals and adjusted to national needs. Teachers had an opportunity to integrate their own practical experiences in the corpus of knowledge handed over to students.

The work and educational activities of the Nursing School of the Sisters of Mercy of the Holy Cross in Bratislava were influenced by several historical events during the second decade of its existence. The records made by Sister Fides Dermeková in the chronicle of the Nursing School of the Sisters of Mercy of the Holy Cross in Bratislava reflect not only the activities and problems of the school but also the social and political situation of the Czechoslovak Republic, mentioning important representatives of Slovak political life and reacting to various political events.<sup>460</sup> The nursing school in Bratislava reacted to the announced mobilization<sup>461</sup> by interrupting the educational process on the decision of the provincial superior. Sisters were allocated to work in the hospital, and two Sisters were sent to a division hospital. The educational process stopped indefinitely.<sup>462</sup>

A change in the position of school director occurred on 11 October 1940, when Prof. Dr. František Šubík,<sup>463</sup> who was working there as a teacher, was appointed as the new director.<sup>464</sup> The educational process in the nursing school responded to the escalation of the war by adding several subjects to its curricula. For example, *Public nursing during the war* was taught during the war, with lectures starting on 13 February 1941 and lasting till the end of the conflict. In September 1941, men – brothers from the religious order of the Brothers of Mercy – were admitted to the nursing school for the first time. There were two male students out of a total of

460 They mentioned, for instance, the death of Andrej Hlinka (27 September 1864 – 16 August 1938). For more information: *Kronika ošetrovateľskej školy milosrdných sestier sv. Kríža 1931 – 1943*, (record from 1938): 265 – 266.

461 Mobilization was declared on the 23 September 1938 on the basis of political events. This was associated with the Munich Agreement, which regulated the development in the border area of the Czech Republic.

462 The educational process at the nursing school was restored on 10 October 1938.

463 MUDr. František Šubík (1903 – 1982), known as Slovak poet of Catholic modernism Andrej Žarnov, with civil occupation of a doctor – pathologist. On 15 March, the Slovak government appointed him as a Professor of pathological anatomy and a principal of the Institute of Pathological Anatomy of the Faculty of Medicine of the Slovak University. He worked there until 30 June 1945. At the end of April 1943, Šubík participated in an international examination of mass graves in the Katyn forrest as a member of the official commission of the Red Cross. After 1945 he emigrated and lived in the United States until 1982.

464 After the tragic death of Dr. Hugo Humburský on 21 May 1942, he became chief of the section. On 11 June 1942 he participated in the school leaving exams as the director of the nursing school. In: *Kronika ošetrovateľskej školy milosrdných sestier Sv. Kríža 1931 – 1943* (record from 1942), 325.

29 students.<sup>465</sup> Improvement in the quality of education of students at the nursing school was also achieved thanks to the sisters from the Congregation and their will to strengthen their qualification through study at academies for teachers.

The last school year during the war (1944–1945) started in September, as usual. However, the premises of the nursing school neighboured with a military object and military arsenal, so the Ministry of Health issued the instruction to close the dormitory due to the approaching war front. Students were allocated to hospitals for practice. Only permanent personnel remained in the school building, and shortly afterwards the premises were occupied by the Soviet military corps.

Fifty-three students finished their studies with diploma exams on 14 June 1946, and 31 graduates enrolled in the school in September 1947 (for school years 1947-49) while 22 students attended the nursing school during the school year 1948 – 1949.<sup>466</sup> In 1950, 55 graduates who attended the school in years 1949 – 1950 passed the school leaving exam.<sup>467</sup> The last time the Nursing School of the Sisters of Mercy of the Holy Cross in Bratislava opened its door was in September 1949 (for the 1949/50 school year), with 17 students enrolled in the first school year.<sup>468</sup>

The nursing school performed its educational activities in accordance with the law of the Slovak Republic (1939 – 1945) until 1948, when it was transformed into a state school. The property was confiscated by the state and the personnel remained at the school. Sisters were affiliated to the resort of Commission of the Slovak National Council in the area of education and culture and their salaries were funded by the state. However, religious teachers from the nursing school later received termination notice from the Commission for Education, Sciences and the Arts in Bratislava, signed on 25 June 1950. This happened on the basis of the *Law on fundamental reform of comprehensive education* from 21 April 1948, *clause §2*.<sup>469</sup> Religious teachers did not fulfil “educational and pedagogical tasks”, and their job contracts as “state teachers” were cancelled on the basis of the regulation of *§20 of Law No. 66/1950 regarding*

465 ŠA BA, f. OŠMSSKBA, Diplomové skúšky 1942, inv. No. Š 6688. This concerned Brother Karol Štefan Korman. He was born on 5 September 1909 in Šaštín and attended public and burgher schools. He spent 17 years working in surgical, urological, internal, Rtg, laboratory, rhinolaryngological and ophthalmological departments. The second student was Brother Primus František Lukáč, born on 26 October 1921 in Jacovce. He attended public and burgher schools and worked for six years in departments of surgery and internal medicine.

466 ŠA BA, f. OŠMSSKvBA, katalóg OŠvBA inv. No. 6669.

467 ŠA BA, f. OŠMSSKvBA, katalóg OŠvBA, inv. No. 6670, 6671.

468 ŠA BA, f. OŠMSSKvBA, katalóg OŠvBA, inv. No. 6672. Preserved archival records do not reveal if the students finished their study at the nursing school in a regular way. The Catalogue of the Nursing School of the Sisters of Mercy of the Holy Cross in Bratislava does not contain any information about their diploma certification.

469 §2: *Schools take care of universal intellectual, moral and physical development of students. They educate youth in accordance with progressive national traditions and ideals of humanity, lead to individual thinking, meaningful behaviour, vigorous work and sociable collaboration, awaking the desire of youth to self-education and progress. They lead young people to active participation in school life and the enhancement of the republic. They cultivate the sense of community within the family, the nation, Slavism and humanity. They educate nationally and politically conscious citizens of a peoples' democratic state, brave defenders of motherland and devoted supporters of working nation and socialism.*

*the pay and working conditions of state employees* valid from 17 May 1950.<sup>470</sup> The financial income of the religious teachers was cancelled on 30 June 1950.<sup>471</sup>

### Conclusion

The whole religious life of the Sisters of Mercy of the Holy Cross is soaked with the apostolic spirit. According to the example of their founders, who had a strong social feeling, the Sisters are called to penetrate the depth of the mystery of the Cross and resurrection, which gives them the gift of trust, hope and power. The Congregation of the Sisters of Mercy of the Holy Cross succeeded in founding the first nursing school in Slovakia. Its establishment by the Congregation of the Sisters of Mercy of the Holy Cross in Bratislava marked the birth and development of professional nursing education in Slovakia. This private school was for a long time the only nursing school in Bratislava that educated certified nurses of the sick. In 1949 it was confiscated by the state and only a year later forcibly cancelled by the communist power. The school educated more than 500 professional nurses during its existence and undoubtedly contributed to the enhancement of nursing education in the former Czechoslovakia.

The implementation of similar studies can significantly strengthen the perception of Christian values and their influence on life in the post-COVID era. It also serves as psychological and spiritual support in preparation for further pandemics.

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### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

470 §20: Termination of the job contract without notice. The office cancels the job contract if the employee expresses behaviour on the basis of which he/she cannot be seen as reliable person anymore, or if immediate termination is based on the effort of the state to maintain the work discipline and thus is considered as necessary.

471 On the basis of the decision made by Central Committee of the Communist Party of Slovakia, Commission for Education, Sciences and the Arts, along with the Slovak Office for Ecclesial Matters, around 340 religious teachers were dismissed by the termination decree dated 30 June 1950 or 31 July 1950, if Sisters were willing to take the decrees personally. There were several exceptions, when teachers were dismissed as of 31 August 1950.

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## SOME INCENTIVES TO DEVELOP THE UNDERSTANDING AND PRACTICE OF CONJUGAL SPIRITUALITY AND MYSTICS: INSPIRATION FOR GUIDING MARRIED COUPLES IN THE POST-COVID ERA



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### Abstract

**Background:** It is necessary to examine the relationships in permanent harmonious marriages and to look for transferable principles of how they function. The given article is based on biblical principles and can be used as a source of inspiration even in the post-COVID era, as the facts in the above-mentioned analysis are very relevant for the protection of the current state of marriage against a crisis while simultaneously being an opportunity for comparison or even replication, i.e. citation in similar researches and studies.

**Conclusion:** The implementation of similar studies can contribute to unique and new beneficial research approaches, which in the post-COVID era will focus, for example, on helping spouses to realize the importance of mutual manifestation of marital tenderness in everyday life. The impact of the manifestation of marital tenderness on the marital relationship itself can serve to protect the marital relationship from a crisis while also strengthening it in situations similar to the COVID-19 pandemic.

**Keywords:** Catholic marriage – Intimate life – biblical inspiration – Home church – New evangelization.

### Introduction

A long-term marital relationship in present times, in which half of all marital relationships fail, has a different value than in the past. It is becoming a rarity. Society is getting used to divorce and family as a normal part of life. Many spouses gradually seem to stop feeling guilty about failed marriages, despite all the negative effects increasingly escalating in today's society, such as psychosomatic problems, emotional instability or the low resilience of individuals and groups. Therefore, it is necessary to examine the relationships in permanent harmonious marriages and to look for transferable principles of how they function.

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The given article is based on biblical principles and can be used as a source of inspiration even in the post-COVID era, as the facts in the above-mentioned analysis are very relevant for the protection of the current state of marriage against a crisis while at the same time are also an opportunity for comparison or even replication, i.e. citation in similar researches and studies.

The Old Testament spirituality and mystics are embodied in the Psalms and its special, marital form constitutes the content of the Song of Songs. It narrates the story of a young couple, a bride and groom, who are in love with each other and does so by looking at all human values, especially physical beauty, which represents a kind of sign of their deep inner feelings. They meet several times, but their love is never fulfilled, because they are still far apart. It is actually a search for the loved one connected with the hope of the fulfilment of love, which, however, does not take place in this poem, and so their love remains an ideal to be followed. Everything in the poem is based on the principle of respect for the freedom of the other party, without any seduction or pressure. Dedication, freedom and mutual understanding figuring in it are a gift of love and at the same time a characteristic of this love. God educates human person in her own humanity, and turns to her with the invitation to master the art of the love between man and woman. Indirectly, this implies that such an intention should be realised through visible signs that reveal the importance of the dignity of each person and also the meaning of her being. Not only this. The human love realized in the pure form of natural love between man and woman represents a privileged way in which human person finds God. In this sense we can say that on the path of human love, humans learn how to develop their relationship with God who enters the covenant of love and devotion with them. The Spirituality of the Song of Songs looks at the human reality with wide open eyes and heart to help the couples form seamless unity and become one soul, one heart, and one body.<sup>473</sup>

In response to exaggerated care and cult of bodily beauty flourishing in the ancient world, the past Christian spirituality and lifestyle were concentrated in the monastic way of life. The distrust of human sexuality became a universally accepted attitude, and the juridical-moralist understanding of marriage prevailed. Third orders were created for lay believers as certain forms of transferring this spirituality in the world, i.e. in the life of families. Anyway, the topic of spirituality and mystics remained the domain of consecrated persons. This situation persisted even though Christian tradition dealt intensively with the theology of mystical marriage between God and soul giving rise to an extensive description of mystical experiences lived by individual saints whose mystical union with the Absolute was often described in terms of intimate marital relationship. However, as far as we know, the Christian tradition has never proceeded in the opposite direction considering marital tenderness and intimacy as the mystical union of spouses with God. Therefore, we want, as it were, engage reverse gear, i.e. reinterpret the marital intimacy as a space where „full-blooded“ mystics is experienced. As for the development of this aspect of mystical life, we are situated, so to speak, “at zero point”. Although we have seen a significant increase in the number of publications on the theology of marriage in recent years, *the mystics of conjugal intimacy* remains virtually unnoticed, not to mention the complete absence of a *systematic explication* of this aspect of married life.<sup>474</sup>

473 Ladislav Csontos, *Základné črty spirituality Starého zákona* (Trnava: Dobrá kniha, 2014), 82.

474 Carlo Rocchetta, *Il sacramento della copia, Saggio di teologia del matrimonio cristiano* (Bologna: EDB, 2010), 12.

### ***The renewed theology of marriage***

The impulse to seek the ways of living authentic conjugal mystics came relatively recently as the fruit of the Second Vatican Council which emphasized the unitive purpose of marriage and the universal priesthood of all the baptized who are called to the fullness of the Christian life, that is, to holiness. In the perspective of the Christian view and practice of married and family life, the perspective extends to eternity, to the fullness of love.<sup>475</sup> The unitive purpose does not imply any superiority of man over woman or the subordination of woman to man, but an equal partnership based on mutual love, which is manifested by tenderness and striving for common salvation.<sup>476</sup> If we want to talk about conjugal spirituality and mystics, we must embrace sexuality and think of the marital bed as a place that is sacred and sanctifying for the spouses. For Christians, it is a sacred place where spouses, provided they live their intimacy in a truly human way and immersed in sacramental grace, experience God's love and set out again and again on their wedding journey or, better said, marriage pilgrimage; the marital bed thus becomes for them a place of grace, blessing and personal experience of mutual unity blessed by God. Indeed, it is no accident that the most ancient forms of the celebration of the sacrament of marriage included the ceremony of blessing the bedroom and the bed of the newlyweds.<sup>477</sup> As we could already see, the Old Testament prayer of Sarah and Tobias points in the same direction.

In the pastoral constitution *Gaudium et Spes* on the Church in the Contemporary World, the Council Fathers devoted an entire chapter to the dignity of marriage and the family (GS 47-52). They defined it as the intimate partnership of married life and love established by the Creator and qualified by His laws which is rooted in the conjugal covenant of irrevocable personal consent. Hence by that human act whereby spouses mutually bestow and accept each other a relationship arises which by divine will and in the eyes of society too is a lasting one. The genuine love between spouses includes free and mutual gift of themselves comprising and integrating sexual and emotional dimension of human person, thus fulfilling God's plan for people. This clearly implies that by their very nature, the institution of matrimony itself and its animating power - conjugal love - are ordained for the procreation and education of children. Furthermore it is emphasised that Christian spouses are rooted in Christ who, as the Bridegroom of the Church, comes into their lives of and keeps abiding with them. Thus the Christian family - as it stems from marriage which is an image of the covenant of love between Christ and the Church and a living participation in it - should, by means of mutual selfless love, generous fertility, unity and fidelity of Christian spouses, reveal to everyone the living presence of the Saviour in the world and the true nature of the Church.<sup>478</sup>

As a matter of fact, it is the daily actualisation of the unity lived in sacramental marriage through Christ, with Christ and in Christ that is the way to conjugal mystics. It becomes a way of knowing God and supernatural realities and thus enriches human life with mystical knowledge that reaches its highest degree in mysterious union with God.<sup>479</sup> This understanding

475 Renzo Benetti, *Come in terra così in cielo, Coppia e famiglia: quando l' amore è per sempre*. (Assisi: Edizioni Porziuncola, 2017), 17.

476 Ladislav Csontos, “Výzvy k inovácii pastorácie manželstvá a rodiny vyplývajúce zo situácie rozvedených a znovuzosobášených,” *Studia Theologica* 21, no.1 (2019): 147-168.

477 Carlo Rocchetta, *Teologia del talamo nuziale. Per un'intimità gioiosa* (Bologna: EDB, 2017)

478 Carlo Rocchetta, *Teologia del talamo nuziale. Per un'intimità gioiosa* (Bologna: EDB, 2017). 10-16.

479 Ján Ďurica, *Stručný katolícky teologický slovník* (Trnava: Dobrá kniha, 2015). 619.

finally replaced the long-standing juridical model of marriage codified in the Code of Canon Law of 1917 that was valid until 1983. This document comprised very few passages concerning intimacy, spirituality and the mystical dimension of married life. The canons no. 1110-1112 of the old Code of Canon Law merely stated in a stern phrasing that valid marriage gives rise to eternal and exclusive union between the spouses. They lack the openness to spiritual growth towards the heights of mystical union with God. The above mentioned understanding of marriage finds its confirmation in theological texts that originated in this period. Look at this example: If Christian spouses are in a state of sanctifying grace, this grace will further increase in them by virtue of their conjugal bond. Both spouses have the same rights and obligations with regard to their married life. They can therefore rightfully demand marital act, but are also obliged to submit if the other party demands so. The wife becomes the husband's partner unless the relevant legal norm prevents it.<sup>480</sup>

The inspiration for the renewal of marital spirituality and mystics can be found in the Old Testament's Song of Songs. Inspired by the wedding ceremony of King Solomon, it celebrates the mutual acceptance and recognition of the married couple, considered the manifestation of loving tenderness shining in the light of joy and beauty. It has nothing to do with such an understanding of conjugal relationship where sexual intercourse between husband and wife is a mere obligation aimed only at procreation, or is seen as a remedy for lust rather than a vocation to the joy of loving each other.<sup>481</sup> In the current cultural situation where the concept of marriage based on love prevails, the Song of Songs' approach appears more suitable than the moral-juridical one. It is connected with the idea that marriage is entered into because of love, on the basis of deep emotional reverberation linking both partners and especially as a result of their free decision, i.e. not for property or for the sake of parents.<sup>482</sup>

The Christian understanding of the unitive purpose of marriage is based on the premise comprised in the very beginning of the book Genesis - at the beginning of the relationship between man and woman stands God himself: "Therefore a man leaves his father and his mother and cleaves to his wife, and they become one flesh" (Gen 2:24). This union implies inseparability representing openness, limitless potential and vocation for the eternal future to live full union with Jesus who gives himself in the sacrament of marriage. Since Christ remains forever closely connected with spouses, they, as Christians, are spouses in the Lord united with God through the bond of eternity, immersed in the love by which Christ loves his Church, the love that never fades, even if one or the other of the couple, and finally both of them come to the end of their earthly route, because their mutual love is grafted in Christ and rooted in his love. Inseparability is not a cage forcing spouses to stay together, but a gift and the possibility enabling them to grow incessantly, day by day until they receive the fullness of the final gift in eternity.<sup>483</sup>

Already St. Robert Bellarmine taught that the sacrament of matrimony can be understood in two ways: first, as the act of its celebration; second, as the period of its duration after

480 Alexander Spesz, *Sviatosti*, (Trnava: Spolok svätého Vojtecha, 1951). 198-199.

481 Carlo Rocchetta, *Le stagioni dell'amore. Fidanzati e sposi in cammino con il Cantico dei cantici Saggio di teologia del matrimonio Cristiano*, (Bologna: EDB, 2015). 163.

482 Michael Sievernich, "Problém rozvedených a znovuzosobášených v Cirkvi z pastorálno-teologického hľadiska," *Teologický časopis* 8, no.1 (2010): 49.

483 Renzo Bonetti, *Come in terra così in cielo, Coppia e famiglia: quando l'amore è per sempre*. (Assisi: Edizioni Porziuncola Bonetti, 2017). 47-51.

being celebrated. It follows that the sacrament of matrimony resembles the Eucharist which is a sacrament not only during its celebration but also as long as the substance of bread and wine persists. Similarly, until the spouses live, their union is always the sacrament of Christ and the Church.<sup>484</sup> Thus, the ecclesial mission of Christian marriage and the family to accept, maintain, reveal and communicate love as a living image and real partaking in the Christ's love for the Church, his Bride, can be interpreted in this way.<sup>485</sup> Seen from this perspective, the Eucharist and matrimony represent two pillars of the symbolic space of Christianity. Another five sacraments are born out of the symbolic space generated through the basic sacrament - the Eucharist - while the coordinates of the sacrament of matrimony are rooted in the very moment and the ongoing process of creation. It follows that through their celebration sacraments open various symbolical, creative spaces shaping every life situation encountered by Christianity in the world and society.<sup>486</sup>

Not only do the engaged couples celebrate the sacrament of marriage, but they literally become the sacrament of marriage. In the act of their mutual self-giving, they celebrate the mystery of the cross; through their everyday way of life they celebrate the mystery of Christ's love for the Church: it is embodied in the way they embrace each other when they return home from work in the evening, in the way they kiss... Every gesture of theirs can become a celebration, because it is a sign through which Christ makes visible his love and perpetuates his sacrifice. In this manner they unite their lives in Christ. Through their married life, they are called to render glory, thanksgiving, and praise to the Lord God and sanctify God's people. Thus, marriage is not a static sacrament, because it unites two free persons, two currents of life by means of mutual love which they can develop but also neglect. The conscious living of conjugal unity in Christ is the principle of conjugal spirituality which proceeds towards mystics. Whenever spouses accept each other and share their lives, they become one in the same way as Christ with his Church is one, as the World of God is one with humanity; this oneness is realised in the embrace of physical unity, in the service to each other, children... Kissing, caressing, preparing food, dining together, being close by, side by side, these are all unifying gestures. Each of them is a kind of „celebration“, „ceremony“ making present God's love. Without any limitations on time and space, spouses give Jesus the opportunity to perpetuate the act of giving his life out of love and make it a visible reality. Living their joint life together with him, they become a continuation and celebration of the very reality of marriage realised through free self-giving motivated by love. Giving one's own body out of love means expressing and doing complete self-giving. It is not a matter of how to live sexuality, but rather how to live twenty-four hours liturgy of self-giving out of love. In this sense there is no longer any meaningless physical gesture. The sacrament of marriage is a vocation to live the mystery of married life consciously, as the unification of spouses in Christ representing the basis of the whole conjugal spirituality.<sup>487</sup>

484 Marc Ouellet, *Mistero e sacramento dell'amore. Teologia del matrimonio e della famiglia per la nuova evangelizzazione*, (Siena: Cantagalli, 2007). 70.

485 Ouellet, "Mistero e sacramento dell'amore," 107.

486 José Granados, "Senza differenza sessuale niente simbolismo: antropologia nuziale e teologia sacramentaria," *Il Matrimonio cardine dell'economia sacramentaria*, Editet by Alexandra Diriar and Mirjana Gegaj, (Siena: Cantagalli, 2017): 53.

487 Renzo Bonetti, *La liturgia della famiglia, La coppia sacramento dell'amore* (Milano: San Paolo, 2012). 17-31.

### Conjugal tenderness

We find inspiration for Christian conjugal spirituality in biblical images of God that are closely connected with the images drawn from the lives of fathers, mothers and spouses. Jesus Christ invites everyone: "Learn from me, for I am gentle and lowly in heart" (Matt 11:29). He also sets out the pattern that a Christian should follow in his life: "You, therefore, must be perfect, as your heavenly Father is perfect" (Matt 5:48). Both man and woman are called together to follow Jesus Christ and realize the image of God in their common life where tenderness has a special place.<sup>488</sup> *The Dictionary of Biblical Theology*, edited by Xavier Leon Dufour and published in 1962 is a unique phenomenon in the history of Catholic theology since it represents the first theological dictionary containing the entry *tenderness*. It was inserted by Pierre-Émile Bonnard. This short text is an appropriate starting point for further reflection on what is the basis of conjugal relationship and spirituality. In the biblical understanding, the figure of father represents an image of selfless love that creates space for forgiveness. Masculinity and fatherhood require the experience of receiving forgiveness from God bringing gratuitous justification that is not granted for our merits. The precondition for accepting this gift is to realize that we have been struck by the love that precedes every action of ours, always offers a new opportunity, encourages and stimulates. If we accept the fact that God's love is unconditional, that the Father's affection is not bought or paid for, we can love in spite of everything and forgive others, even if they have been unjust to us. Otherwise, family life will cease to be the space of understanding, accompaniment and stimulation, and will become the space of constant tension and mutual punishment. The mission of father is not to punish, but to love without conditions, to be the protagonist of the pedagogy of love which gradually matures and reaches the fruitfulness through patience. No one is more patient than God the Father, and no one is able to be more understanding and wait more perseveringly than he does. He simply longs for us to sincerely look at our lives and present it to him before his eyes without pretence, willing to keep growing and asking him for what we cannot yet achieve on our own.<sup>489</sup> At the same time, God is like a mother taking her child in her arms to caress him (cf. Ps 131) - the loving mother who never forgets her child. (cf. Isa 49:15)

In the perspective of the Christian view and practice of married and family life, the prospect of conjugal communion extends to eternity, to the fullness of love. It is actually a vocation to constant growth in mutual love. The unveiling and actualisation of the beauty of marriage require the cultivation of the unity of the spouses as a „mystical plant“ that grows and blooms in paradise. It takes place in the reciprocity of married life, which gradually deepens day by day. It is a greeting „good morning“ or „good night“, but especially the way and tone in which it is pronounced. It is a kiss, a hug and a profession „I love you“ and other expressions of tenderness. The kingdom of God becomes present in marriage and the family not in the forms of „power“ and „force“ but in the way of life characterised by service and giving life with such generosity and readiness that no obstacle can prevent doing it and no justification or response is needed. It is giving without measure, a gift that does not expect an answer, a gift without searching for remuneration, seeking justification or harbouring hidden motives. It is a gift for the sake of gift - the anticipation of self-giving for the sake of self-giving - that goes hand in hand with the generous embracement of the gift of life and offers forgiveness even

488 Robert Skrzypczak, "Miłość małżeńska i rodzinna w nauczaniu papieża Franciszka," *Studia Bobolanum* 30, no.3 (2019): 93-94.

489 Mariangela Musolino, "Prospettive morali della teologia della tenerezza," *La virtù della tenerezza II „vangelo“ di Papa Francesco*, (Assisi: Edizioni Porziuncola, 2019): 182-183.

face to face misunderstanding and injustice.<sup>490</sup> This is the daily spirituality of conjugal and family tenderness where the tenderness of God is concretely revealed, as the psalmist puts it: "O taste and see that the Lord is good! Happy is the man who takes refuge in him!" (Ps 34: 8). Taste and see that these spouses and their family are good!

There are spouses and families who have incorporated into their spirituality the prayer of the Church according to the Liturgy of the Hours. Some pray lauds, vespers, and compline, others just two of these prayers, but there are also those who usually pray only one. There are married couples but also single persons who, before leaving the house, read the daily gospel and choose the "key sentence" that subsequently accompanies them during the day as a solid reference point that creates the spiritual unity of their self and conjugal relationship. Another method is the prayer of the rosary that can be prayed in parts on the way to and from work, individually or together in the family. However, these forms of prayer still represent elements of monastic spirituality where prayer is the basic axis of the day. An ordinary day of common family, instead of being articulated by the times of the day is rather governed by typical places where their life unfolds. Firstly, it is the marital bedroom as a privileged space of privacy where the spouses experience the deepest intimate union. The spouses are only able to live authentic intimacy by focusing on infinity, uncovering the presence of Jesus. Here they can glorify God with the hymns of Benedictus and the Magnificat. Another place through which their daily life passes is the space where they eat, where the family can meet around the common table. It is followed by the living room, where they spend their free time, talking together, playing board games, watching TV and the like. Here they can also listen to God's word like Mary at Jesus' feet. An important place is the bathroom, where they take care of the purity of their body, during which they can think of the purity of their life before God. For many, it's the car, others meet God on their shorter or longer routes along which they walk to work. Last but not least, it is the workplace. These are the places where God's presence can be experienced and the life of prayer lived.<sup>491</sup> Here the spouses celebrate their "liturgy for the sanctification of the place".

### Sexuality in the service of the unifying tenderness

In connection with philosophy and theology, Ján Letz remarks that in the concept of mystics, the spiritual-psychological, i.e. the subjective-human moment also comes to the fore. In this sense, mystics is a set of processes that take place "below" or "above" or "on the edge" of the usual experiential and cognitive processes through which one comes into direct contact with the Divine. To achieve the mystical experience, human person creates, or rather, together with God, co-creates the preconditions for it. These include, above all, the basic spiritual attitude of openness and elementary love, consistent moral life generating the purity of the heart, meditation and contemplation, loving dialogue with one's neighbour and God, sacramental life and, last but not least, ascetic effort.<sup>492</sup> Our understanding of Christian mystics, rooted in the tradition of spiritual theology, represents a radical return to the principle "grace presupposes nature, it does not destroy nature, but perfects it." The starting point is everything that forms the human basis of marriage, i.e. all the psycho-physical abilities of human person.

490 Bonetti, "La liturgia dela famiglia," 17-27.

491 Bonetti, "La liturgia dela famiglia," 159-170.

492 Ján Letz, *Mystičky Západu, Inšpirácia pre kresťanskú filozofiu a telógiu*, (Prešov: Vydavateľstvo Michala Vaška, 2002). 11-12.

Following this line of reasoning, we understand the whole complex of intimate conjugal encounter as the actualisation of the sacrament of marriage as well as the source and expression of the shared joy of both spouses. Thus, human sexuality is elevated and ennobled. As far as the development of Christian spirituality is concerned, we are witnessing a strange paradox: if the Christian tradition dealt with sexuality, it did so more frequently in connection with chastity and consecrated virginity than with regard to marriage. As far as marital behaviour was concerned, certain negative view prevailed that was mostly limited to issues related to motives lying behind sexual gestures and their proper execution and pervaded with suspicion. Since the time of St. Augustine, the understanding of marital relationship was reduced to three goods of marriage (proles, fides, sacramentum - fertility, fidelity, sacrament) in order to justify marital sexuality as acceptable and honest. We could add to them the fourth good - teneritas (tenderness) - discovered by theology after the Second Vatican Council. Despite the plurality of views, medieval theologians — including Thomas Aquinas — were generally convinced that marital relationships are always stained by sin, at least the venial one, except if directly aimed at procreation and maintaining mutual fidelity.<sup>493</sup>

As a result, the element of joy disappeared from of the Christian understanding of marriage. However, the story of becoming “one body” lived by every couple is not focused in the first place on procreation and preservation of the species, but rather on realizing complete communion, perfect unity where integral masculinity and integral femininity are fully realized. The bodies of male and female represent a revelation of the relational nature of human person and the potentiality to form a community characterised by unselfish giving and mutual acceptance aimed at making of these two beings not only the unity of body but also of spirit, i.e. the complete unity of persons. “One body” meant for the inspired author the complete unity of man and woman, the unity of spirit and body, mind and emotions, not just physical unity. It is no coincidence that sexual intercourse is understood in biblical language as an act of particularly deep “knowledge.” It does not represent just an encounter of bodies, but above all the sign of communion whose protagonists know and recognize each other. It is an act of love where the contact of genital organs is perceived as the fullest expression of communion, an expression of openness to mutual giving and acceptance leading to unity.<sup>494</sup> The Bible uses the descriptions of tender motherly and fatherly love to express the nature of God’s relationship with humans. Both man and woman, as God’s creatures, are called to enter the school of tenderness and learn how to enrich each other by free mutual giving. On this path they experience their unity and the fact of being created in the image of God.<sup>495</sup>

The spirituality of spouses leads them to become increasingly aware that conjugal sexuality is in the service of tenderness, which is, so to speak, the God-given genetic code of conjugal love. It represents a way of humanization of *eros* allowing erotic attraction to become a source of constantly renewed intimacy. In this context only can conjugal sexuality maintain the freshness of an event, which, despite its recurrence, is always astonishing, overflowing with novelty, carefully protected in the inner castle of the soul and testified by everyday life, which enables spouses to resist the temptation to lose sight of the highest sense of intimacy. Tenderness offers something that sexuality alone can never provide: *the atmosphere of*

493 Carlo Rocchetta, *Le stagioni dell'amore. Fidanzati e sposi in cammino con il Cantico dei cantici Saggio di teologia del matrimonio cristiano.*, (Bologna: EDB, 2015). 171.

494 Carlo Rocchetta, *Il sacramento della copia, Saggio di teologia del matrimonio Cristiano* (Bologna: EDB, 2010). 26.

495 Carlo Rocchetta, *Teologia della tenerezza. Un „vangelo“ da riscoprire*, (Bologna: EDB, 2014). 12.

*selflessness, the astonished joy of encounter, and generous, creative freedom.* At the same time, it allows sexual encounter to remain in the state of *permanent dawn, constant rebirth.* The ability to *express tenderness* does not represent a marginal, secondary fact. On the contrary, is a constitutive element without which the highest sense of marital intimacy cannot be realised. This is the basic premise of true intimacy and the starting point of the mystical path: to make of tenderness the pulsating heart of partnership.<sup>496</sup>

Until the recent past, the metaphor of conjugal intimacy has traditionally been used to clarify the meaning of the mystical union of the soul with God, for example in the writings of St. Teresa of Avila and St. John of the Cross. The discovery of marital mystics implies the opposite process, the starting point of which is mystics, in the light of which marital intimacy is reinterpreted as an experience of grace that leads married couples to perfection in love. As Carlo Rocchetta says, the challenge we face is to show that there is no contradiction between mystics and conjugal intimacy, between sacramental grace and *eros*, and that in fact the opposite is true - there is a deep continuity between them. This means that through their loving union, spouses go through such a noble experience that we do not exaggerate at all if we call it “mystical.” If we look at the matter from this perspective, we can rightly say that the Church draws on the most sublime vision of conjugal sexuality that is conceivable at all; it is a vision that is deeply rooted in the biblical message, from the first pages of the book of Genesis, through the Song of Songs to the Gospels.<sup>497</sup>

As for the most recent Church teaching on this issue, Pope Francis declares quite clearly and unequivocally that sexual intercourse is not sinful in any way. Not only that. He explicitly emphasizes its positive value consisting in the fact that it is “a path of growth in the life of grace for the couple”; it is a statement of decisive importance that must be embraced in all its theological and ethical meaning, destined to provide permanent guidance for thinking about Christian intimacy. In this way, a deeply rooted belief pervading Christian thought for centuries and only recently more massively rejected, has been overcome. According to this opinion, if spouses want to become saints, they must adopt the attitude of mutual detachment and shift away from married life; in fact, the exact opposite is true - they can only reach the highest peaks of mystical experience by fully immersing in it. The reason for this consists in the fact that something extraordinary, offered by God awaits us “below” or “above” or “on the edge” of the usual experiential and cognitive processes of human person.<sup>498</sup>

### Conclusion

The basis of every Christian marriage is the vocation of spouses to mutual unity in God. Every form of conjugal spirituality that strengthens both dimensions of this unity - horizontal and vertical - is in the service of this vocation. Such are and should be all forms of common or personal prayer, which find their incarnation in the daily expressions of tenderness. One of the highest expressions of this unity is joint family dining and the most privileged space of conjugal unity is the marital bedroom. *The marital bed located in the middle of the bedroom represents the altar on which the couple celebrates the sacrament of their marriage.* It is no coincidence that the image of the Blessing Christ or Virgin Mary is often placed above marital beds. Thus, a new path opens before all Christian spouses. As a matter of fact, they are not called to live their vocation by fleeing from their mutual relationship. On the contrary, their

496 Carlo Rocchetta, *La mistica dell'intimità nuziale: crescere nella grazia del sacramento*, (Bologna: EDB, 2019). 13-14.

497 Carlo Rocchetta, *La mistica dell'intimità nuziale: crescere nella grazia del sacramento*, (Bologna: EDB, 2019). 10-11.

498 Rocchetta, “La mistica dell'intimità,” 21-24.

spirituality and mystics consist in fully immersing themselves in it and living it in the grace of the Holy Spirit, to the extent that it becomes their ladder to the Absolute.<sup>499</sup> Thus, the circle drawn on these pages is complete - we have returned to the Old Testament story of Sarah and Tobias that conveys the same message.

Given the fact that is possible to perceive the current society in terms of interpersonal relationships which are very fragile and disordered, this is why it is necessary to deal with healthy forms and principles of these relationships in order to heal it. It is the implementation of similar studies that can contribute to unique and new beneficial research approaches, which in the post-COVID era will focus, for example, on helping spouses to realize the importance of mutual manifestation of marital tenderness in everyday life. The impact of the manifestation of marital tenderness on the marital relationship itself can serve to protect the marital relationship from a crisis while simultaneously strengthening it in situations similar to the COVID-19 pandemic.

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### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

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499 Rocchetta, "La mistica dell'intimità," 25.

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**RETURN OF THE ENCYCLICAL FRATELLI TUTTI TO THE PATRISTIC ROOTS OF CHRISTIAN SOCIAL TRADITION**

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**Abstract**

**Background:** The submitted study offers an analysis of selected aspects of the encyclical *Fratelli tutti* written by Pope Francis. It represents a part of ongoing research aimed at uncovering the roots of Christian thinking and early Christian relations between the personal faith of Christians and their involvement in the social sphere of a secular society. The study points to the fact that the document of Pope Francis is based on the thinking of St. Augustine and his interpretation of the Gospel event regarding the Good Samaritan (Lk 10, 29-37). Thus, the Pope not only leans on a well-known Christian tradition but points out the Augustinian roots of the Christian social tradition, as well. The encyclical recalls early Christian conviction regarding the impact of living faith on our relations towards our neighbours and the need for Christian social feeling. The structure of the study opens with a contextual introduction of the encyclical. The second chapter can be seen as an interpretational key to comprehending the whole document, and the subsequent analysis unveils the traditional Augustinian thinking upon which the encyclical is based. In the conclusion we summarize the possible impact of the encyclical on further research.

**Conclusion:** Several modern studies point to the fact that early Christian authors emphasized the importance of interconnection between the personal faith of Christians and their involvement in favour of other people in a secular society. When it comes to contemporary secular society, the study has the potential to deepen the dialogue between Christians and non-Christians, with the possible conjunction of the dialogue in the social sphere.

**Keywords:** Pope Francis – Fratelli tutti – Good Samaritan – social teaching – Augustine.

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**Introduction**

The encyclical *Fratelli tutti* was officially published on 4 October 2020 during the visit of Pope Francis in Assisi. Its subtitle (“On Fraternity and Social Friendship”) explains that it is dedicated to brotherhood and social friendship. It is another document in a whole line of social encyclicals published in history by Roman popes.<sup>501</sup> It is the third encyclical written by Pope Francis. The first one, entitled *Lumen Fidei*, was written in collaboration with Pope Emeritus Benedict XVI,<sup>502</sup> and the second was called *Laudato si*.<sup>503</sup> This study is dedicated to an analysis of certain aspects of the third encyclical, entitled *Fratelli tutti*.

It is an ample text divided into eight chapters: 1. Dark clouds over a closed world; 2. A stranger on the road; 3. Envisaging and engendering an open world; 4. A heart open to the whole world; 5. A better kind of politics; 6. Dialogue and friendship in society; 7. Paths of renewed encounter; 8. Religions at the service of fraternity in our world.

Although the document was written in the Spanish language, its Italian title was also preserved in translations to other languages. This decision was not accidental. The title was taken from *The Admonitions of Saint Francis* (1181 – 1226),<sup>504</sup> whose name Pope Francis adopted. Not only this document, but also the Pope’s other speeches are marked by the patrimony of the founder of the Franciscan order, who tried to reform the Church of his times. In *The Admonitions*, Francis of Assisi spoke to his neighbours, explaining the way of life that he wished. It is noteworthy that *The Admonitions* drew inspiration from the richness of previous ecclesiastical and secular literature of the early Christian Middle Ages.<sup>505</sup>

Thus, the encyclical of Pope Francis subconsciously leans on this Franciscan thesis, offering a certain way of life:

“Fratelli tutti. With these words, Saint Francis of Assisi addressed his brothers and sisters and proposed to them a way of life marked by the flavour of the Gospel. Of the counsels Francis offered, I would like to select the one in which he calls for a love that transcends the barriers of geography and distance, and declares blessed all those who love their brother ‘as much when he is far away from him as when he is with him’.”<sup>506</sup>

The Pope understands these words as the basis for brotherhood, regardless of physical distance or past and present geographic position. In this regard, we can mention Francis’s vision of Christ, who asked him to reconstruct his church. It is necessary to mention that both in Latin and Italian, the words *ecclesia*, or *chiesa*, mean the building of a church as well as a spiritual

501 Cf.: Social Encyclicals (Leo XIII *Rerum novarum*; Pio XI *Quadragesimo anno, Divini Redemptoris, Mit brennender Sorge*; John XXIII *Mater et magistra, Pacem in terris*; Paul VI *Populorum progressio*; John Paul II *Laborem exercens, Sollicitudo rei socialis, Centesimus annus*) SSV Trnava 1997. There are also two encyclicals written by Pope Benedict XVI entitled *Deus Caritas est* and *Caritas in veritate*, as well as the apostolic letter *Octogesima adveniens* from 1971 by Pope Paul VI.

502 Miloš Lichner, Uzdravenie ženy trpiacej na krvotok ako interpretačné patristické pozadie encykliky *Lumen fidei*. *Acta facultatis theologiae universitatis comenianae Bratislaviensis* XI, (no. 2/2014): 43-63.

503 Arogyaswamy, Bernard. Energy Sustainability and Pope Francis’ Encyclical on Care for Our Common Home: National Policies and Corporations as Change Agents. *Consilience*, no. 18 (2017): 1-28.

504 *The Admonitions of Saint Francis* 6.1. Francis of Assisi: Early Documents, vol. 1., New York, London, Manila, 1999, p. 131. Cf. Robert J. Karris, *The Admonitions of St. Francis: Sources and Meanings*, by Robert J. Karris, Franciscan Institute Publications, 1999.

505 Robert J. Karris, St. Francis of Assisi’s Admonitions in New Ecclesiastical And Secular Context. *Franciscan Studies* 74, (2016): 207-230.

506 Encyclical Letter fratelli Tutti of the Holy Father Francis on Fraternity and Social Friendship 56. (Libreria Editrice Vaticana, 2020), 1.

community – the Church. Many expressions of Pope Francis are inspired by this vision and it can be assumed that they actually mean an invitation to reconstruct the Church in the sense of *ecclesia semper reformanda est*.<sup>507</sup> In this regard we can recall the texts of early Church or medieval councils or synods that reflect the effort to reform the Church not only in the area of faith but also the department and the impact of faith on practical life. Hence, in what sense is the Pope's encyclical faithful to Christian tradition? Does the Pope offer anything new that is based on tradition or not related to it at all?

### **Intellectual background of the encyclical**

Every papal encyclical contains a bibliography, where we can find information about the authors whose works served as a source of inspiration to the Pope and his collaborators. Thus, it enables us to define the existing intellectual context and anticipate certain thoughts.

Here we encounter the first problem. The encyclical *Lumen fidei*, the result of the collaboration of Pope Francis and Pope Emeritus Benedict XVI, contains 50 quotations – 25 of them taken from the works of patristic authors of mainly Latin provenience (14) and the rest are Greek authors or authors writing in the Greek language in a non-Greek environment. The encyclical *Fratelli tutti* contains 288 quotations.

If we put aside the self-quotations from the works of Pope Francis – his greetings, speeches, homilies, exhortations and encyclicals – we discover the following:

Pope Emeritus Benedict XVI: 17x, Pope St. John Paul II: 15x (1x from the work of young Karol Wojtyła), St. Thomas Aquinas: 7x, St. Paul the Apostle: 4x, St. Augustine: 4x, St. Francis of Assisi: 3x, Second Vatican Council: 3x, Pope Pius XII: 2x, St. John Chrysostom: 2x, Pope St. John XXIII: 1x, followed by mostly francophone authors like Eloi Leclerc, Paul Ricoeur, Gabriel Marcel and René Voillaume: each of them 1x, and early Church authors quoted one time: Lactantius, Gregory the Great, Basil the Great, Peter Chrysologus, Ambrose of Milan, Benedict, Irenaeus of Lyon and pre-Christian Latin authors: Vergilius 1x and Cicero 1x.

The above results testify to the fact that most self-quotations from the works of Pope Francis indicate the continuity of his thinking and teaching. Most quotations from the works of his predecessors indicate that Pope Francis sees himself walking in their footsteps, mainly the footsteps of Benedict XVI and John Paul II. The same thing can be said about medieval authors. Several quotations from the works of modern authors or Church authorities does not indicate anything particular in his way of thinking. Church fathers are quoted rather seldom. There is only one hint of knowledge of the text from the area of social teaching – a significant work of St. Ambrose, *On Naboth*, written between the years 386 – 395.<sup>508</sup>

### **Structure of the second chapter of the encyclical**

The whole encyclical of Pope Francis consists of eight chapters, of which the second chapter is crucial. The first chapter offers the Pope's contextual view of a contemporary world stricken by several difficulties. The Pope writes about dark clouds over a closed world, describing the current situation, insufficient protection of human rights, conflicts and wars, the Covid-19 pandemic, the absence of humanity in the treatment of migrants, pride and striving for boundless profit regardless of the destiny of the weak, the sick and the poor. Hence, the Pope wants to introduce his thoughts after a thorough mapping of the real situation of the world and the Church, aiming to offer an adequate reaction.

507 See also: Yves Congar. *Vraie et fausse réforme dans l'Église* (Les éditions du Cerf, Paris, 1969).

508 Ambrose. *De Nabuthae*, CSEL 32/2, 469-516.

Pope Francis placed the exegesis of a parable in the second chapter of his encyclical (articles 56 – 86), right after the first one, which offers a contextual view of the current situation. Thus, the second one contains the indication of solutions described later in the subsequent chapters. Modern exegetists underline the ethical or moral dimension of the parable.<sup>509</sup>

Pope Francis understands the message of this story as determining a redefinition of being Christian. Let us recall that something similar happened in the era of early Christianity at the beginning of the fourth century, when the Church, after a long time of persecution, had to adapt to a new situation and redefine the meaning of being Christian. The Pope sees the current situation in a similar way; he defines it through various factors and offers a new definition of being Christian. Of course, this has a crucial impact on ecclesiology.

The Pope sees the exegesis of this event through the prism of a biblical verse from the Book of Genesis 4:9, where God asks Cain: "Where is your brother Abel?" And the answer of Cain: "Am I my brother's keeper?" This Lucan parable represents a starting interpretational key of the whole encyclical, allowing the Pope's thinking to be interpreted in a complex way. The Good Samaritan, who helps a wounded Jew of totally different religion and culture, is thus presented by the Pope as an example of behaviour for Christians and all other people of good will: "The parable is one that any of us can relate to and find challenging".<sup>510</sup>

In the first place he recalls a fundamental message of the whole Bible that all people are the descendants of Adam and Eve, citing the verse from Job 31:15 "Did not he who made me in the womb also make him? And did not the same one fashion us in the womb?", which clearly reminds us that every man was created by the same God.<sup>511</sup> Subsequently, he draws attention to the efforts of the Israeli nation to overcome the tribal way of thinking that limited the pursuit of good deeds to the members of one's own tribe,<sup>512</sup> which became conspicuous in the New Testament – Mt 5:45 (the heavenly Father "makes his sun rise on the evil and on the good") and Lk 6:36 ("Be merciful, just as your Father is merciful").<sup>513</sup> This results in an imperative present in both the Old and New Testament which reminds the Jewish people that they themselves had once lived as foreigners.<sup>514</sup> The Pope also adds a universal New Testament imperative: "In everything, do to others as you would have them do to you; for this is the law and the prophets" (Mt 7:12).<sup>515</sup> In this context, we can better understand that "love does not care if a brother or sister in need comes from one place or another."<sup>516</sup> Because "our only course is to imitate the Good Samaritan. Any other decision would make us either one of the robbers or one of those who walked by without showing compassion for the sufferings of the man on the roadside,"<sup>517</sup> underlining this idea a few lines below:

"there are only two kinds of people: those who care for someone who is hurting and those who pass by; those who bend down to help and those who look the other way and hurry off. (...) Will we bend down and help another to get up? This is today's challenge, and we should

509 J.A. Fitzmyer, *The Gospel according to Luke (X-XXIV)*, AncB 28A, New York etc. 1985, pp. 882-885.

510 Encyclical Letter fratelli Tutti, 39.

511 Encyclical Letter fratelli Tutti, 41.

512 Encyclical Letter fratelli Tutti, 41-42.

513 Encyclical Letter fratelli Tutti, 42.

514 Encyclical Letter fratelli Tutti, 42-44.

515 Encyclical Letter fratelli Tutti, 42.

516 Encyclical Letter fratelli Tutti, 43.

517 Encyclical Letter fratelli Tutti, 46.

not be afraid to face it. In moments of crisis, decisions become urgent. It could be said that, here and now, anyone who is neither a robber nor a passer-by is either injured himself or bearing an injured person on his shoulders.<sup>518</sup>

Pope Francis subsequently reminds us of the traditional explanation that our belief in God does not guarantee that we actually live in accordance with it in a practical way:

“belief in God and the worship of God are not enough to ensure that we are actually living in a way pleasing to God. A believer may be untrue to everything that his faith demands of him, and yet think he is close to God and better than others. The guarantee of an authentic openness to God, on the other hand, is a way of practicing the faith that helps open our hearts to our brothers and sisters.”<sup>519</sup>

Hence, the Pope is convinced that being Christian means transforming faith into deeds. This is something that needs to be shown to everybody, to the whole world. Nobody can be prevented from the effort to assist others like the Samaritan:

“All of us have a responsibility for the wounded, those of our own people and all the peoples of the earth. Let us care for the needs of every man and woman, young and old, with the same fraternal spirit of care and closeness that marked the Good Samaritan.”<sup>520</sup>

Pope Francis believes that Christ suggests to “be present to those in need of help, regardless of whether or not they belong to our social group”.<sup>521</sup> Jesus does not want us “to decide who is close enough to be our neighbour, but rather that we ourselves become neighbours to all.”<sup>522</sup>

Thus, the Pope defines the sense and the essence of Christian existence open to all those who need help, regardless of their religious adherence or geographical and political incorporation. In the following chapters of the encyclical, Pope Francis applies this fundamental message to specific areas of social life.

All of this leads to one essential question: to what extent is the Pope’s interpretation of the parable about the Good Samaritan traditionally Christian? Is it inspired by a certain tradition or does it represent the mere contemporary view of Pope Francis?

### **The parable about the Good Samaritan in early Christian tradition**

We can find several allegorical and literal interpretations of the parable in Christian tradition.<sup>523</sup> Actually, there are two lines weaving through the history: the Antiochian and the Alexandrian interpretational traditions.

From the second century we find allegorical interpretations, according to which Jerusalem is seen as paradise and Jericho as this world, which Adam and the whole of mankind have been thrown into by the power of envious demons, and the Samaritan represented Christ the Saviour.

518 Encyclical Letter fratelli Tutti, 48.

519 Encyclical Letter fratelli Tutti, 50.

520 Encyclical Letter fratelli Tutti, 53.

521 Encyclical Letter fratelli Tutti, 54.

522 Encyclical Letter fratelli Tutti, 53-54.

523 Cf. Riemer Roukema, The Good Samaritan in Ancient Christianity, *Vigiliae Christianae* 58, (2004): 56-74.

We can mention Irenaeus of Lyon, who uprooted gnostic theses<sup>524</sup> in his interpretation of the parable and Origen, who seemed to be the first to interpret the inn mentioned in the parable as the image of the Church in his homily dated to years 233 – 234.<sup>525</sup> We also find out for the first time that the wounded man is actually the image of Adam from the Book of Genesis, who abandoned paradise and was attacked and hurt by the devil.<sup>526</sup> Origen attributes the ideas mentioned in his sermon to one of the presbyters, whom we cannot identify. Furthermore, the sermon has been preserved in the Latin translation by St. Jerome, though we cannot be sure how precise and complete the translation from the Greek language is. In the commentary to the Gospel of John, Origen describes the Samaritan through the verse of the Psalm 120:4 (LXX, today’s Psalm 121) as a guardian: “the Guardian of Israel never slumbers nor sleeps.” Experts clearly point out that Origen associated the Samaritan (*šōmrôn* in Hebrew) with other Hebrew expression *šōmer* – the guardian from the Psalm 121:4.<sup>527</sup>

We also find an allegorical interpretation of the parable in the works of Church fathers written in Greek, where they put emphasis on the ethical dimension of the explanation. Saint John Chrysostom, Bishop of Constantinople, who lived in the fifth century, wrote about the attribute of mercy paid by Christians to pagans, Hebrews and Jewish Christians who were considered to be spiritually wounded.

The interpretation of the parable in Ambrose’s commentary to the Gospel of Luke is based on the attitude of Origen, too.<sup>528</sup> Naturally, he tries to avoid Origen’s Platonism, insisting on the pre-existence of souls. However, there is a crucial difference. While Origen read the story through the prism of the verse of Psalm 121:4, Ambrose did it through the verse 114:6 (LXX 113:7): “He lifts the poor from the ash heap”.

It seems that St. Augustine, Bishop of Hippo, paid the largest amount of attention to the exegesis of the parable. It is obvious that he knew both Origen’s and Ambrose’s interpretations.<sup>529</sup> Out of a large number of references to the parable in his works, we can choose his early work *De doctrina Christiana*. In the first book (396 – 397), Augustine deals with the question of the double commandment of love to God and to our neighbour. He narrates the story of the Samaritan from the Gospel of Luke, arriving to the conclusion that our neighbour is actually everyone who needs our help or practically any poor person.<sup>530</sup>

“And he teaches us that we should see as our neighbour everyone who needs our service of mercy or who would need our helping hand in case of poverty. These words reveal that our neighbour is also the person who should reciprocate and help us if we need it. Nobody can

524 Irenaeus Lugdunensis. Contre les Hérésies (Adversus Haereses), III,17,3, SC 211, pp.123-137.

525 Origenes. Homélies sur saint Luc 34,3, (In Lucam Homiliae). SC 87, 1962, pp. 400-411.

526 See also: Bartelink, Gerhardus Johannes Marinus, Les Démons Comme Brigands, *Vigiliae Christianae* 21, no. 1 (1967):12-24.

527 Roukema, The Good Samaritan, 63-64.

528 Ambrosius Mediolanensis. Sur saint Luc (Expositio euangelii secundum Lucam) VII,71-84, SC 52bis, 1958, p.

529 Roukema, The Good Samaritan 69; Roland J. Teske, St. Augustine on the Good Samaritan in: Augustine of Hippo, Philosopher, Exegete, and Theologian. Marquette Studies in Philosophy, No. 66. Marquette University Press, 2009, pp. 167-192; Langouanère, Jérôme. La notion de prochain dans les premiers écrits d’Augustin. Esquisse de réflexion. *Revue d’études augustiniennes et patristiques* 57, (2011): 239-267; Brodie McGregor, Suffering and Political Thought: A theological consideration of the propriety of suffering as a category in political thought. University of Edinburgh, pp. 281-297; Dominique Sanchis, *Samaritanus ille*. L’exégèse augustinienne de la parabole du bon Samaritan. in: Recherches des science religieuse, Juillet-Septembre 1961, tome XLIX, numero 3, pp. 406-425.

530 Augustinus. *doctr. chr.* 1,31, SIMONETTI, pp. 55-56.

be the neighbour to anyone but his neighbour. But if there is anyone who does not see that nobody can be excluded, whom can we refuse to help? Indeed, our Lord extends this rule to our enemies, too, when he says: 'love your enemies, do good to those who hate you'.<sup>531, 532</sup>

Augustine uses the Latin expression *proximus* as we find it in *Vetus latina* or *Veteres latinae*, which is a translation of the Greek *hó pléios* (LXX) and the Hebrew *rea'*. The Hebrew expression *rea'* is derived from Hebrew word *ra'ah*, which means first of all to "graze", "nurse", "feed". Only then does the association with the meaning "to be a friend of someone" arrive.

Although *The Vulgata* translated it as *amicus*, *The New Vulgata* returned to the expression *proximus*. Of all the Latin Church fathers, Jerome and Augustine were the ones who most contributed to the understanding of the term neighbour.

The second important text of Augustine can be found in a work of his written shortly after the first book *De doctrina christiana*. Here, we are referring to the second volume of the book *Quaestiones euangeliorum*, written in the year 400.<sup>533</sup>

We can point to a clear analogy of Augustine's explanation with Origen, although there are some differences, mainly concerning the fact that for Augustine, the double denarius was a symbol of the double commandment of love,<sup>534</sup> while Origen<sup>535</sup> and Irenaeus<sup>536</sup> interpreted it as a knowledge of the Father and the Son.

#### **Fundamental elements of interpretation of the parable about the Samaritan**

We have to explain whether or not Augustine and other early Christian authors had the right to interpret the figure of the Samaritan as Christ. Augustine as well as Origen before him associated the verses 8:48-49 from the Gospel of John with the verses 10:30-37 from the Gospel of Luke.<sup>537</sup> In the Gospel of John, Christ is accused of being a Samaritan and acting under the spell of the devil. Augustine recalls that Christ denied being under the spell of the devil, but he did not deny that he was a Samaritan. Augustine believed that Christ considered himself to be a Samaritan, ergo a guardian.<sup>538</sup>

The fact that Origen and Augustine liken the Samaritan to a neighbour leads us back to the original meaning of the word *proximus* in the Hebrew language mentioned above, i.e. "guardian". According to biblical texts, the Lord<sup>539</sup> is the guardian, and in this spirit the verse of the Psalm 120:4 was related to resurrected Christ.<sup>540</sup>

For this reason, Augustine is convinced that Christ is our neighbour and that is why he came to heal our wounds and gave us a double commandment of love for God and for our neighbour. In this spirit, Augustine adopts Origen's symbolical interpretation, according to which the fallen and wounded man represents Adam from the Book of Genesis. And since we all descend from

531 Lk 6:27; Mt 5:44.

532 Augustinus. *doctr. chr.* 1,31, SIMONETTI, p. 56.

533 Augustinus. Qu. Eu. 2,19, CCL 44b, p. 62.

534 We can also find the metaphor in the works of Gregory of Nyssa, but Augustine could hardly have read his Greek text: Gregoire de Nysse. In canticum canticorum homelia 14, PG 44, 1085.

535 Origenes. Homélie sur saint Luc 24,3,8, (In Lucam Homiliae). SC 87, 1962, p.

536 Irenaeus Lugdunensis. Contre les Hérésies (Adversus Haereses), III,17,3, SC 211, pp. 123-137.

537 Augustinus. lo. eu. tr. 43, 2, CCL 36, p. 373.

538 Augustinus. en. ps. 30, en. 2, sermo 1,8, CCL 38, s. 197; en. ps. 125, 15, CCL 40, p. 1856.

539 Augustinus. qu. eu. 2, 19, CCL 44/B, pp. 62-63.

540 Augustinus. en. ps. 68, sermo 2,11, CCL 39, pp. 925-926.

Adam,<sup>541</sup> we are affected by the same wound, needing Christ the Samaritan. Augustine recalls the tradition introduced by Origen that the devil and his angels<sup>542</sup> are the bandits who wounded him. The inn represents the image of the Church – this theory is adopted by Augustine from an older tradition mentioned above.<sup>543</sup> He recalls again that the two coins given to inn keeper for taking care of the wounded symbolize the two commandments of love for God and our neighbour. Hence, his commentary to the Psalm 125: He gave two denarii for care, love for God and love for neighbour, because on these two commandments leans the law and the prophets.<sup>544</sup> Thus, the innkeeper does not symbolize only the Apostles, as suggested in the verse from 2 Cor 5:20 ("So we are ambassadors for Christ"),<sup>545</sup> but Augustine relates this role to himself and all the Christians ("I act likewise, we all act likewise, serving as innkeepers").<sup>546</sup> Here we could say that the Bishop of Hippo relates everything to the Church, where man, wounded by original sin, is taken care of by other Christians. However, Augustine wrote clearly in his book *De doctrina Christiana*, quoted above, that every man represents the wounded and thus becomes our neighbour:

"This is taught by Apostle Paul, when he says: 'You shall not commit adultery; you shall not kill; you shall not steal; you shall not bear false witness; you shall not covet, and whatever other commandment there may be, are summed up in this saying, "You shall love your neighbour as yourself. Love does no evil to the neighbour".'(Rom 13:9-10) So, whoever assumes that the Apostle did not include every person in this commandment must admit a very absurd and truly destructive opinion that the Apostle did not consider to be sinful if some man (or non-Christian or enemy) commits adultery with his wife, kills him or covets his property. It is clear that only a fool can assume something like this, and hence it is obvious that every man is to be seen as our neighbour, because we must do no evil to anyone. (...) Because our Lord Jesus Christ appears to us in the figure of a man who helped an almost dead man on the road, wounded and abandoned by bandits. Even the psalmist prays: 'I went about in grief as for my brother' (Ps 35:14). But divine nature is of higher perfection than ours and exceeds it by far, and the commandment to love God differs from the commandment to love our neighbour. God implements his benevolence and mercy out of his goodness, but we are supposed to be compassionate with one another because of him. He is merciful so that we could fully rejoice of him. We sympathize with one another to rejoice in him."<sup>547</sup>

It is clear to Augustine that the aim of biblical exegesis is to fulfil the double commandment of love for God and for neighbour. Christ showed his mercy to the whole of mankind<sup>548</sup> and subsequently anyone who needs help becomes a neighbour for Christians.<sup>549</sup> Augustine expressed

541 Augustinus. en. ps. 125,15, CCL 40, p. 1855.

542 Augustinus. en. ps. 136,7, CCL 40, p. 1968.

543 Augustinus. qu. eu. 2, 19, CCL 44/B, p. 63.

544 Augustinus. en. ps. 125,15, CCL 40, p. 1856. The coins that the Samaritan left to the inn keeper were interpreted in various ways in pre-Augustinian tradition. They symbolized the Old and the New Testament, God Father and God Son or double commandment of love. The latter was adopted by Augustine.

545 Augustinus. lo. eu. tr. 41,13, CCL 36, p. 365.

546 Augustinus. sermo 179A = Wilmart 2, 8, PLS II, p. 715.

547 Augustinus. *doctr. chr.* 1,32-33, SIMONETTI, pp. 57-58.

548 Miloš Lichner, Chápanie pojmu *miser cordia* v *Enarrationes in psalmos* podľa svätého Augustína. in: Lichner, M., Benkovský, J., Juhás, V. *Božie milosrdenstvo v konfrontácii spiritualit* (Trnava: Dobrá kniha, 2016).

549 Kurz, William, Patristic Interpretation of Scripture within God's Story of Creation and Redemption. in: Letter & Spirit, Vol. 7: The Bible and the Church Fathers: The Liturgical Context of Patristic Exegesis. (Steubenville, OH: Emmaus Road Publishing, 2011): 35-50.

it clearly in his sermon Denis 16 (=299D), pronounced around year 413 in Carthage during the feast of the Scillitan Martyrs, where he touched on the verse from the Gospel of Luke 10:29 (“And who is my neighbour?”). We are convinced that this verse does not only reflect the thinking of Augustine, but it points out the parallel with the thinking of Pope Francis, as expressed in his encyclical *Fratelli tutti*. Augustine writes:

“The one who asked expected that the Lord might perhaps tell him: your father and your mother, your wife, your children, your brothers, your sisters. But this was not his answer. He’d rather submit the explanation that every human being is the neighbour of every human being and so he said. (...) This man from Jerusalem saw priests and Levites as his neighbours and Samaritans as strangers. Eventually, his neighbours passed him by and the stranger became his neighbour. So who was a true neighbour to this man? (...) What did he answer? I think it was the one who treated him with mercy. And the Lord said: go and do likewise.”<sup>550</sup>

### Conclusion

American sociologist Rodney Stark<sup>551</sup> writes that in the first centuries the spreading of Christianity was strongly supported by the fact that Christians showed their feeling for charity not only mutually but also towards non-Christians, e. g. during epidemics.<sup>552</sup> We have been living in an era of big changes and the migration of people of various cultures and faiths. Pope Francis is aware of this situation and tries to offer an answer of the Church that would be in accordance with Catholic tradition. Although he does not mention it in his encyclical, our research has clearly shown that the thoughts of Pope Francis are rooted in a very ancient tradition documented by early Church authors, mainly Augustine of Hippo. And although the Pope does not refer to these early Christian texts with a clear interpretational line from Origen through Ambrose to Augustine directly, we can say that his exegesis and subsequent impulses in other chapters of his social encyclical are deeply traditionally Christian. Contrary to early Christian authors, the Pope avoids the allegory so typical for patristic exegesis, but the ideas he draws inspiration from involve such patristic exegesis. Both Augustine and Pope Francis remind us that Jesus turned the question the other way round. He did not ask whose neighbour was the wounded man, but which one of the three was his neighbour. Augustine and Pope Francis share the belief that this has always been the core of Christian existence.

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### AUTHOR CONTRIBUTIONS

All the mentioned authors significantly, directly, and intellectually contributed to the work and approved its publication.

### CONFLICT OF INTEREST

All the authors declare that the research involved in the article and the publication of the article were carried out without having any business, financial or other relations and/or circumstances that could be considered as a potential conflict of interest. At the same time, all the authors declare that there is no conflict of interest related to this article or its review.

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550 Augustinus. Sermo Denis 16 (=299D), 2, MA 1, p. 76.

551 Rodney Stark, *The Rise of Christianity: a sociologist reconsiders history* (Princeton, 1996): 73-94.

552 Roukema, *The Good Samaritan*, 73.

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**SOCIAL WORK WITH FAMILIES OF CHILDREN PLACED IN INSTITUTIONAL CARE (SHORT COMMUNICATION)**

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**Abstract**

**Background:** This article presents the results of our research, the main aim of which was to examine which factors influenced the results of social work with families. The research sample consisted of 38 families which had children placed in institutional care. Social work for the purpose of remediation of families was realized by the organization Smile as a Gift. In our article we present the partial results of our research, namely the specific finding of whether there is a connection between the time of separation of the child from the family and its interest about the child. We want to compare our research results with the findings of Miklošková et al. 2020 who examined the types of bonding behaviour of children placed in centers for children and families in Slovakia. They obtained interesting results which point to the need for rapid involvement of parents in the process of remediation immediately after the removal of the child from the family. **Methods:** Our research sample consisted of 38 families, which had children placed in institutional care. Intensive field social work was carried out with the families of the children for a period of one year after the child was removed from the biological family and subsequently placed in institutional care. Content analysis of the collection of documents of selected families and own observation. The clients' collections of documents consisted of the following materials: an anamnesis report on the family, social diagnostics of the family prepared according to the methodology of the program PRIDE by which we identified the status of the family in terms of its strengths and weaknesses, ecomaps, genocharts, developmental puzzle of the child, a table with the history of losses of each family member. To process the objectives of the research questions we used the Pearson's chi-square test method as a statistical method that allows us to verify whether a random variable has certain predetermined probability distributions.

**Results:** The main aim of the research was to find out whether there is a connection between the period of separation of the child from the family and its interest about the child. We compare the results of our research with the identified styles of relational bond- behaviour of children placed in institutional care throughout Slovak republic.

**Conclusion:** The results that are presented are the results of our own work with the families of children from children's homes which were included in the remediation process after removing children from the family environment.

**Keywords:** Relationship – Bonding – Support – Remediation.

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### Introduction

If family doesn't meet its role, if some of its functions aren't fulfilled or fail in it, we speak apart from a functional family about a problematic, dysfunctional family.<sup>554</sup> In the event of a failure of a family function, it is importance that experts sensitively direct the family to the right path, show it where it fails and what are the possibilities and risks.

The family, which shows a non-fulfillment of a certain function, comes to the aid of social workers, social curators and other experts, for example from the ranks of teachers and medicine doctors. They all work together for one goal. They help the family heal it and ensure its proper functioning outwardly towards society, but also inwardly towards itself. Such remediation of the family, the assistance to family members takes place in cooperation with employees of institutions and organizations and through professional activities. The basis is to provide help to the child by helping the whole family.<sup>555</sup>

### Methods and Results

The main aim of the research was to find out whether there is a connection between the period of separation of the child from the family and its interest about the child. We compare the results of our research focused on 38 families with children placed in institutional care with the identified styles of relational bond- behaviour of 480 children placed in institutional care throughout Slovakia.

Content analysis of document collections of specific families own observation and statistical processing using the Pearson's chi-square test method were the main methods of our research. Other data used for data analysis were the plan of social work with children and their families and their ongoing evaluations. The research methods with which we compare our results consisted of two parts. "Quantitative data were collected through two online questionnaires, the first anamnestic and the second relational. Both questionnaires were administered through internet links. The first was an anamnestic questionnaire consisting of 37 questions related to anamnestic background of the participant. This questionnaire was filled in by relevant psychologist, pedagogue, social worker or another professional staff of the center for children and families who know the participant. The second questionnaire started with a 20-item one diagnostic tool for relational ECR-R binding supplemented by sets of questions aimed at forgiveness. In case The ECR-R questionnaire is universal standardized abbreviated form from The Experiences in Close Relationships- Revised (ECR-R) Questionnaire, Fraley, R.C., Waller, N.G. et Brennan, K.A. (2000), Wilkinson, R.B. (2011)."<sup>556</sup>

In this paper, we present selected results of our research in the areas defined above.

**Table No. 1 Statistical results for research question – find out if there is a connection between the time of separation of the child from the family and its interest about the child**

#### Interest \* Separation time Crosstabulation

Count

		Separation time					Total
		1,00	2,00	3,00	4,00	5,00	
Interest	1,00	4	18	5	4	3	34
	2,00	3	1	4	5	12	25
	3,00	3	1	7	4	1	16
	4,00	2	1	8	5	1	17
Total		12	21	24	18	17	92

#### Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	47,786 <sup>a</sup>	12	,000
Likelihood Ratio	45,181	12	,000
Linear-by-Linear Association	1,617	1	,204
N of Valid Cases	92		

**Source: K. Minarovičová, Sociálna práca s ohrozenými a dysfunkčnými rodinami. (Nitra: FSVaZ, Univerzita Konštantína Filozofa v Nitre, 2018), 77.**

„14 cells (70,0%) have expected count less than 5. The minimum expected count is 2,09. The obtained results confirm that there is a connection between the period of separation of the child from the family and its interest about the child.“<sup>557</sup>

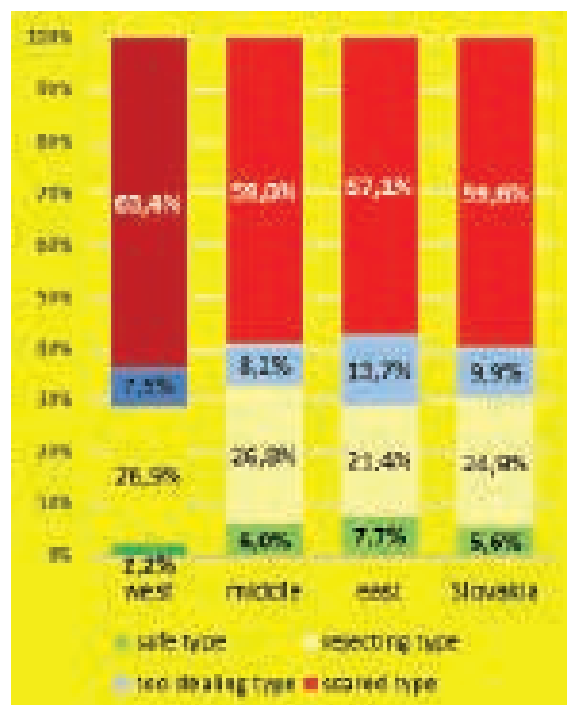
554 Jana Levická et al., *Sociálna práca s rodinou* (Trnava: Trnavská univerzita, 2004).

555 V. Bechyňová and M. Konvičková, *Sanace rodiny. Sociální práce s dysfunkčními rodinami* (Praha: Portál, 2008).

556 Monika Miklošková et al., *Naplnenie práva dieťaťa na kontakt s rodinou a naplnenie potreby blízkej osoby v prostredí náhradnej starostlivosti na Slovensku*. (Bratislava: Spoločnosť priateľov detí z detských domovov Úsmev ako dar a Vysoká škola zdravotníctva a sociálnej práce sv. Alžbety, 2020), 41-42.

557 Katarína Minarovičová, *Sociálna práca s ohrozenými a dysfunkčnými rodinami* (Nitra: FSVaZ, Univerzita Konštantína Filozofa v Nitre, 2018), 77.

**Table No. 2 Types of bonding behavior in children placed in centers for children and families in Slovakia**



Source: Miklošková et al. (2020), 56.

Based on the data above which researched Miklošková et al. we can conclude that the largest number of children (59,6 %) have a scared type of relationship. Next 24,9 % children show rejecting type of relationship; 9,9 % have too dealing type of relationship and only 5,6 % of children show a safe type of relationship.

We also emphasize the need for a close relationship in our research<sup>558</sup> in which we focused on determining the degree of emotional frustration respectively deprivation in children in children’s homes and in foster families. The research sample consisted of 150 children who grew up in three different environments: children living in institutional types of children’s homes; children growing up in children’s homes with a family character of care and children living in foster families. In our research we used Freybergh’s self-assessment scale of deprivation. An important factor that affected the degree of emotional frustration respectively deprivation was the fact whether the children had a contact with their biological parents or had contact only occasionally respectively had any contact. In the research we found that children who had frequent contact with their parents had less emotional frustration respec-

558 Katarína Minarovičová, *Emocionálna frustrácia u detí v detských domovoch Psychiatria, psychoterapia, psychosomatika*. 16, no. 3 (2009): 128-133.

tively deprivation than children who had only sporadic contact, as well as children who had any contact with biological parents.

These results point to the need for intensive involvement of parents in the process of remediation immediately after the removal of the child from the family.

**Discussion and Conclusion**

Social workers should respond adequately to the needs of children placed in institutional care. The search for effective ways of helping, among which the effort to renew or repair relationships with biological families can be included, significantly contributes to a positive change in the internal experience of children in institutional care. Families often need some form of accompaniment and support. The difficult situation, which is indisputably the exclusion of a child from the biological family, requires a sensitive approach by social workers. And not just those. The process of remediation also reveals the spiritual dimensions of human survival, which lead to the need to forgive guilt. Vadrna (2018) emphasizes the need to forgive parents for their guilt. Based on the results of his research, he states that thanks to forgiveness, children were able to start living their lives without bitterness and pain. „The child needs to have his negative feelings named as fully legitimate, because in most cases the parents have actually committed guilt against them (unless the reason for the exclusion was, for example, parental death, illness or unintentional guilt). If the child has his negative feelings recognized as justified, to move the child further in the process of forgiveness.<sup>559</sup> Thanks to forgiveness, a young person can later live a quality life differently than people who have not been able to cope with the loss of a good childhood. With our contribution we want to point out the importance of the relationship between children in institutional care and their parents and the need for intensive rehabilitation of these families.

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559 M. Vadrna, *Obnova vzťahu k rodičom v živote ľudí vyrastajúcich v detských domovoch*. Rigorózna práca. Fakulta sociálnych vied a zdravotníctva UKF v Nitre. (2018): 30-31.

## WE HAVE BEEN LOOKING FOR ANSWERS TOGETHER FOR MORE THAN 18 YEARS



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**Do we need to address issues related to death and dying? Can people enjoy a good quality of life even in its final stage? Are we able to eliminate pain and other undesired symptoms? Why do we need to work together to make our help effective? How has the COVID-19 pandemic affected hospice and palliative care?**

We will look for answers to these and many other questions during the upcoming **9th International Conference of Hospice and Palliative Care**, which will take place on **16 October 2021** at the Faculty of Health and Social Work of the University of Trnava in Trnava. **The first annual conference took place 18 years ago** on 26 March 2003, and at that time it was the only international conference with a holistic approach for all interested professions in this field in Slovakia. We have naturally continued with this approach. Participants can look forward to erudite lectures of high quality from prominent academics, scientists, and practitioners who are recognised personalities in hospice and palliative care not only in Slovakia and from Slovakia, but also from other countries. The regular presenting lecturers who have also participated at the conference in recent years include a chief expert on palliative medicine in Slovakia, Ms MUDr. Kristína Križanová, head physician MUDr. Andrea Škripeková, PhD. and Prof. Daniel J. West, PhD. (Scranton, USA), who are also the conference guarantors and co-organisers. In addition, we welcome new speakers from Slovakia, the Czech Republic, Austria, Great Britain, the USA, and other countries. In addition to the medical and nursing aspects of palliative care, the lectures taking place in the afternoon will address the psychological, social and spiritual contexts, management, volunteering, paediatric palliative care, and new challenges we face during the COVID-19 pandemic. The conference will take place in the English, Slovak, and Czech languages, while several lectures taking place in the afternoon will be exclusively in English. The poster section will also be very interesting. We believe that the situation will allow us to meet in person and we expect to host around 200 participants, as was the norm in previous years. You can find the details and sign up for the conference at [www.truni.sk](http://www.truni.sk) and on the Facebook page of the Department of Social Work at the Faculty of Health Care and Social Work of the University of Trnava.

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